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| **West Berkshire Training Consortium** |
| **ILM Management Qualifications** |
| Self-Assessment of Management Level |

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| June 2016/WBTC/HG |

Please complete this self-assessment form to evaluate your current management level for qualification mapping against iLM’s hierarchy of management levels.

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| **Level:** | **Suggested Role:** | **Typical Descriptions:** |
| **2** | Team Leader, Supervisor | Operational role with some supervisory and task allocation |
| **3** | First Line Manager | Operational but involved in genuine management duties beyond simple task allocation |
| **4** | Middle Manager  | A wide-ranging definition usually encompassing several layers of management, implementing operational plans and supporting strategic decisions and direction |
| **5** | Senior Manager | Broad in definition again but usually covering those sitting as part of the senior management team up to those at board level |

The assessment looks at three general management areas:

* **Human Resources** –

Including sub-categories of span influence, immediate reports and line management responsibility.

* **Authority** –

Including sub-categories of finance and resources and freedom to act.

* **Service Delivery** –

Including sub-categories of planning and organisation, service improvement, problem solving and decision making.

 Only tick one descriptor (one box) per management area, the one closest to your role. If you have the time it is well worth verifying your self-assessment with your manager or a colleague who has explicit knowledge of you role.

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| **Human Resources** | **Level 2 / Team Leader** | **Level 3 / First Line Manager** | **Level 4 / Middle Manager** | **Level 5 / Senior Manager** |
| **Span of Influence** – the degree of influence you have within the organisation and the number of people directly affected | Up to 121 team only  | Up to 25 1 – 3 teams | Up to 100More than 1 teamSignificant influence on service | Could potentially be 1000’sMany teamsSignificant influence throughout organisation |
| **Immediate reports** – the seniority of those who report directly to you  | Front line staff only | Front line staff and team leaders | First line managers and more junior middle managers | Middle managers and possibly senior managers |
| **Line Management** – examples can be work planning and allocation, checking and evaluating work, and identifying training needs. It also includes responsibilities for personnel functions as recruitment, discipline, career development and appraisal | Responsible for day to day supervision or coordination of staff within a section or functionRegularly responsible for professional supervision of a small number of qualified staff or students | Responsible for day to day management of a group of staffResponsible for the allocation or placement and subsequent supervision of qualified staff or students | Responsible as line manager for a single function or departmentResponsible for the devising of training and development programmes | Responsible as line manager for several/multiple departments |
| **Authority** | **Level 2 / Team Leader** | **Level 3 / First Line Manager** | **Level 4 / Middle Manager** | **Level 5 / Senior Manager** |
| **Finance and Resources** – the responsibilities of the job for financial resources and physical assets | Regularly handles or processes cash, cheques etc. Responsible for the safe use of equipment other than equipment which they personally useResponsible for maintaining stock control and/or security of stock  | Authorised signatory for cash/financial paymentsResponsible for the purchase of some physical assets or suppliesMonitors or contributes to the formulation of department/service budgets or initiatives | Budget holder for a department or serviceResponsible for budget setting for a department or serviceResponsible for the procurement or maintenance of all physical assets or supplies for a department or service Submits capital bids | Responsible for the budget for several services or departmentsResponsible for budget setting for several services or departmentsApproves capital bids |
| **Freedom to Act –** the extent to which the jobholder is required to be accountable for their own actions and those of others, to use their own initiative and act independently and the discretion allowed to the jobholder to take action | Guided by standard operating procedures, good practice, established precedents and understands what results or standards are to be achievedSomeone is generally available for reference and work may be checked on a sample/random basis | Guided by precedent and clearly defined occupational policies, protocol/procedures or codes of conductsWork is managed rather than supervised and results and outcomes are assessed at agreed intervals | Expected results are defined but the post holder decides how they are achievedIs guided by principles and broad occupational policies and/or regulationsGuidance may be provided by peers or external reference points | Is guided by national, organisational or broad occupational policies, but in most situations the post holder will need to establish the way in which these should be interpreted |
| **Service Delivery** | **Level 2 / Team Leader** | **Level 3 / First Line Manager** | **Level 4 / Middle Manager** | **Level 5 / Senior Manager** |
| **Planning and Organisation** - This takes account of the skills required for activities such as planning or organising services, departments, rotas, meetings, conferences and for strategic planning. | Planning and organisation of straightforward tasks, activities or programmes, some of which may be ongoing  | Planning and organisation of complex tasks, activities or programmes, which require the formulation and adjustment of plans | Planning and organisation of a broad range of complex tasks, activities or programmes, some of which are on-going, which require the formulation and adjustment of plans or strategies | Formulation of long term strategic plans, which involve uncertainty and which can impact across the whole organisation |
| **Service Improvement** – the responsibilities of the job for development and implantation of policy and/or services | Implements policies within determined parameters and proposes changes to working practices or procedures for own area | Implements policies for own area and proposes policy or service changes which impact beyond own area of activity | Project management responsibility for the organisational initiativesResponsible for policy implantation and for discrete policy or service development for a service or more than one area of activity  | Programme management responsibilityProject management responsibility for critical organisational initiativesCorporate responsibility for major policy implementation and policy or service development, which impacts across or beyond the organisation |
| **Problem Solving** – the requirement for analytical skills to diagnose a problem and understand complex situations or information and judgemental skills to formulate solutions and recommend/decide on the best course of action | Judgements involving facts or situations, some of which require analysis | Judgements involving a range of facts or situations, which require analysis or comparisons of a range of options  | Judgements involving complex facts or situations, which require the analysis, interpretation and comparison of a range of options |  |