

Trainee chartered accountant and Finance Business Partner

Job Ref: REQ180798

As part of the University's ongoing commitment to redeployment, please note that this vacancy may be withdrawn at any stage of the recruitment process if a suitable redeployee is identified.

The Finance Office includes c.50 staff who deliver financial support to colleagues across the University. Teams within the department include financial planning and analysis, transaction processing for payables and receivables, financial accounting, treasury management, insurance and procurement. The Finance Office is led by the Director of Finance, who is a member of the senior management team of the University. The day-to-day operation of the Finance Office is led by the Deputy Director of Finance. This role sits within the Financial Planning and Analysis team who provide support to devolved budget holders across the University both within academic schools and professional services.

Job Description

Job Grade: AD5 / MA6 (career graded post)

Job Purpose

To support the allocated Senior Finance Business Partner in the provision of proactive, professionally qualified support and guidance to designated Schools or Professional Services ("the Departments") for the management of their devolved budgets; with a clear focus on ensuring the best use of resources.

To work towards achieving chartered accountant status, to the benefit of the institution, matching the level of knowledge and responsibility expected from a training accountant at each stage of their study, with an appropriate and reasonable level of accountability and financial reward.

Job Duties

- **As this is a career graded post, duties and responsibilities at each level of qualification are as per the table below.**

At Unqualified Level (AD5)	At Part Qualified Level (MA6-Lower)	At Qualified Level (MA6-Higher)
Assist in the development of an on-going professional relationship with budget holders, to ensure that the needs of the budget holder are fully satisfied and that service level agreements are adhered to.	Support the development of an on-going professional relationship with budget holders, to ensure that the needs of the budget holder are fully satisfied and that service level agreements are adhered to.	Develop and maintain an on-going professional relationship with budget holders, to ensure that the needs of the budget holder are fully satisfied and that service level agreements are adhered to.
Perform regular reviews of financial transactions and processes, in order to identify any issues or areas of concern that need to be addressed.	Monitor and report upon the financial position of the Departments to relevant stakeholders using appropriate means of communication and financial analysis, thus ensuring an effective and efficient service is provided.	Responsible for monitoring and reporting upon the financial position of the Departments to relevant stakeholders, using appropriate means of communication and financial analysis to ensure an effective and efficient budget management service is provided.

Assist the Senior Finance Business Partners in the production of reports, analysis and presentations in order to provide clear and useful information to budget holders.	Assist the Senior Finance Business Partners in the provision of professional support and advice to budget holders over a wide range of subjects, with a clear focus on obtaining best value and best use of resources for the University.	Provision of professional challenge, support and advice to budget holders over a wide range of subjects, with a clear focus on obtaining best value and best use of resources for the University.
Provide support to the Senior Finance Business Partners for a range of transactional tasks including the management of invoices, processing of journals, allocating costs etc. so that the general ledgers are correctly updated and maintained.	Provide support to Departments' senior management teams in balancing local priorities with University financial requirements in order to achieve the best local performance.	Facilitate the balance of local priorities against University financial requirements in order to achieve local performance requirements.
Produce reports and analysis pertaining to the financial position of the Departments to relevant stakeholders.	Attend key meetings, as a finance expert, to provide support and advice on an ad-hoc basis; preparing and presenting reports and/or analysis as may be required.	Attend key meetings, as a finance expert, to provide support and advice on an ad-hoc basis; preparing and presenting reports and/or analysis as may be required.
	Review and monitor expenditure on supplies and services, produce recommendations for improved efficiencies where appropriate enabling effective financial management of the wider University budget.	Review and monitor expenditure on supplies and services, produce recommendations for improved efficiencies where appropriate enabling effective financial management of the wider University budget.
	Maintain professional working relationships with the wider finance team and other Professional Services to aid in supporting the financial management role.	Develop and maintain professional working relationships with the wider finance team and other Professional Services to aid in supporting the financial management role.
	Identify issues of non-compliance with financial regulations, technical accounting requirements, legal requirements or University policy.	Ensure compliance with financial regulations, technical accounting requirements, legal requirements or University policy and procedures.
		Advise PVC's, Deans and Heads of Professional Services regarding the optimum use of resources at School/Service level.
Assist the Senior Finance Business Partner team in working with each budget holder, to achieve the production of realistic and achievable budgets.		
Assist, under the supervision of the Senior Finance Business Partner, in the preparation of information required by Financial Accounting colleagues for the closure of accounts and preparation of annual financial statements.		
Undertake any other duties of a similar nature that may be assigned from time-to-time, to ensure the continuity of an effective financial management service under the terms of the Service Level Agreement.		

Communication

- Work as an active member of the Finance department and in support of the client Department's senior management team, liaising with members of the wider University.
- Ensure audit and corporate governance requirements of the University are maintained; adhering to all financial regulations.
- Network widely with staff in client Departments while working closely with the Finance team to ensure service objectives are achieved.
- Respond to requests for support from the Senior Finance Business Partner on any financial, statistical or administrative matter relating to the devolved budgets under management.

Training

- Attend appropriate personal development courses and maintain requirements for continuing professional development as required by qualifying institute.
- Commit to personal training and development and the attainment of a professional accounting qualification with a recognised qualifying body.

Functional Contacts

- All colleagues within the University Finance team
- All line managers and support staff within relevant Departments
- Other professional services departments within the University
- Senior Finance Business Partner, Financial Operations Manager and other senior managers within the University as may, from time to time, be required.

Standards of Performance

The required standards of performance will be met when:

- Timely and accurate financial information is available.
- All control systems are working and audited without fault.
- The financial account system and chart of accounts are being used so as to provide information to monitor budgets.
- Personal objectives are being achieved.
- Satisfactory feedback is received having built and managed key relationships engendering trust and mutual respect with devolved budget holders.
- The requirements of the Service Level Agreement are assessed as being fulfilled by the wider business partner team.
- The requirements of the Service Level Agreement are assessed as being fulfilled by the wider business partner team.

Points to Note

The purpose of this job description is to indicate the general level of duties and responsibility of the post. The detailed duties may vary from time to time without changing the general character or level of responsibility entailed.

Special Conditions

All staff have a statutory responsibility to take reasonable care of themselves, others and the environment and to prevent harm by their acts or omissions. All staff are therefore required to adhere to the University's Health, Safety and Environmental Policy & Procedures.

All staff should hold a duty and commitment to observing the University's Equality & Diversity policy and procedures at all times. Duties must be carried out in accordance with relevant Equality & Diversity legislation and University policies/procedures.

Successful completion of probation will be dependent on attendance at the University's mandatory courses which include Respecting Diversity and, where appropriate, Recruitment and Selection.

Organisational Responsibility

Reports to the Senior Finance Business Partner

Person Specification

As this is a career graded post, the requirements of the person specification increase with each level of qualification as per the table below. Your application will be reviewed against the appropriate level of essential and desirable criteria listed below. Applicants are strongly advised to explicitly state and evidence how they meet each of the essential (and desirable) criteria in their application. Stages of assessment are as follows:

At entry Level (AD5)	At Part Qualified Level (MA6-Lower)	At Qualified Level (MA6-Higher)
		As for Part Qualified level – plus:
A 2:1 undergraduate degree (or equivalent) in any discipline. GCSEs in Maths and English at Grade B or above (or equivalent).	Part qualified accountant with the ICAEW.	Fully qualified accountant with the ICAEW.
An interest in a career in finance in Higher Education, and an awareness of current developments in the sector. Previous experience of working in a financially based administration role would be advantageous.	Experience of working within a large and complex financial environment, with some specific knowledge and experience of fulfilling a budget management role.	Experience of working within a large and complex financial environment, with some specific knowledge and experience of fulfilling a budget management role.
An ability to work collaboratively to resolve or explain complex problems. Good organisational skills, logical approach with good attention to detail and the ability to work to tight deadlines whilst managing multiple projects independently.	Experience of challenging existing processes and procedures together with the development and implementation of improved systems where appropriate.	Evidence of working under pressure, with the clear experience of self-motivation and workload prioritisation.
Ability to build and maintain strong relationships, as well as the ability to communicate complex concepts to non-specialists.	Strong communication skills to deal effectively with a variety of stakeholders. The ability to challenge devolved budget managers, present and disseminate financial information effectively to non-financial staff and to present both verbal and written reports to management teams and other stakeholders.	Advanced communication skills to deal effectively with a variety of potential stakeholders. The ability to challenge devolved budget managers, present and disseminate financial information effectively to non-financial staff and to present both verbal and written reports to management teams and other stakeholders.
Excellent analytical and numerical abilities and the ability to pro-actively respond to financial issues as they arise.		
A desire to study an accountancy qualification and a demonstrable commitment to achieving qualification with the ICAEW and compliance with the requirements of a training contract.		Demonstrable commitment to continuing professional education and compliance with the requirements of ICAEW.
Willingness to attendance all compulsory induction activities as specified by the University and adherence to University policies regarding equal opportunities.		

Conditions of Service

The position is FULL TIME and OPEN-ENDED. Salary will be on Administration Grade 5 (£24,771 to £29,515 per annum) progressing to Management and Specialist Grade 6 (£30,395 to £39,609 per annum) on achieving qualification and performance milestones. Starting salary to be confirmed on offer of appointment. Subject to annual pay award.

The appointment will be subject to the University's normal Terms and Conditions of Employment for Grades 1-5, Grades 6 and above staff, details of which can be found [here](#).

The University is committed to enabling staff to maintain a healthy work-home balance and has a number of family-friendly policies which are available at <http://www.lboro.ac.uk/services/hr/a-z/family-leave-policy-and-procedure---page.html>.

We also offer an on-campus nursery with subsidised places, subsidised places at local holiday clubs and a childcare voucher scheme (further details are available at: <http://www.lboro.ac.uk/services/hr/a-z/childcare-information---page.html>)

In addition, the University is supportive, wherever possible, of flexible working arrangements. We also strive to create a culture that supports equality and celebrates diversity throughout the campus. The University holds a Bronze Athena SWAN award which recognises the importance of support for women at all stages of their academic career. For further information on Athena SWAN see <http://www.lboro.ac.uk/services/hr/athena-swan/>

Applications

The closing date for receipt of applications is **9 October 2018**.