Job Description and Selection Criteria

<table>
<thead>
<tr>
<th>Job title</th>
<th>Finance Manager</th>
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<tbody>
<tr>
<td>Division</td>
<td>Mathematical, Physical and Life Sciences</td>
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<tr>
<td>Department</td>
<td>Mathematical Institute</td>
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<tr>
<td>Location</td>
<td>Andrew Wiles Building, Radcliffe Observatory Quarter, Woodstock Road, Oxford, OX2 6GG.</td>
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<tr>
<td>Grade and salary</td>
<td>Grade 8: £41,526 to £49,553 per year (with a discretionary range to £54,131 depending on experience)</td>
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<tr>
<td>Hours</td>
<td>Full time</td>
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<tr>
<td>Contract type</td>
<td>Permanent</td>
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<tr>
<td>Reporting to</td>
<td>Head of Administration and Finance</td>
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<tr>
<td>Vacancy reference</td>
<td>151570</td>
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<tr>
<td>Additional information</td>
<td>This position is subject to a 12-month probationary period.</td>
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</table>

The Role

The Mathematical Institute is looking to appoint to the key role of Finance Manager, to take the lead in developing and implementing the department’s financial plans (principally the annual budget, in-year forecasts and longer-term plans). Our annual turnover is budgeted at £30M, and the department holds around 120 individual research grants at any one time of varying size, scope and complexity, and from a variety of funding bodies including the EPSRC, ERC, UK research charities and industry. The Mathematical Institute has around 250 staff on the main payroll (including over 100 faculty members), and there are around 900 undergraduate students (including joint courses with other subjects), around 250 doctoral students, and around 250 Master’s students across five programmes.

The Finance Manager has oversight of the day-to-day finance operation for the department. The Finance team of six (5.1FTE) has recently been restructured to create a General Ledger team and a Research Projects and Studentships team, with the latter responsible for
management of the department’s research grants and portfolio of studentship funding, including our Centres for Doctoral Training. The postholder will provide leadership and management for staff in the team, while ensuring that the restructure changes become embedded and the needs of the department are well met.

The postholder will work closely with the Research Facilitation team, which actively assists faculty in seeking, costing and obtaining external funding; the Finance team is then responsible for the management of the portfolio of funded grants and contracts through the full lifecycle of projects from award to final report. The Finance Manager plays a critical and leading role in ensuring that the research portfolio of the Mathematical Institute is underpinned by rigorous financial models, effective systems of grants management, and returns the best possible income to the department. The postholder is responsible for ensuring that the department is well-informed about the overall impact of its grant portfolio, complies with all due terms and conditions, and manages the income effectively on an annual and multi-year basis.

The Finance Manager also ensures that the department has in place effective and resilient financial processes and controls. The postholder ensures that the department’s financial position is closely monitored and that timely, accurate management information is provided to the Head of Department, Head of Administration and Finance, departmental officers, staff and faculty. The postholder promotes understanding of the financial implications of decisions through high quality financial information and reporting and plays a key role in developing the overall financial health of the Institute.

Responsibilities

Financial Strategy and Planning

- Working closely with the Head of Administration and Finance, play a lead role in the department’s planning and budgeting activities
- Contribute to the development of the department’s financial plan
- Provide costings for new and existing initiatives, and model different funding scenarios. Analyse the financial and non-financial implications of pursuing new funding opportunities and make recommendations to the Head of Administration and Finance
- Ensure that the financial performance of the department’s key revenue streams, and in particular the income from research activities, are understood
- Prepare the department’s annual budget and in-year quarterly forecasts, in consultation with stakeholders and for review with the Head of Department and Head of Administration and Finance
- Develop key performance indicators for the department
- Contribute to financial elements of the department’s Risk Register
- Take an active role in presenting the department’s financial plans to senior leadership within the department and at regular review meetings with the Division

Financial Control and Monitoring

- Be fully aware of and follow the University’s Financial Regulations and understand them sufficiently to interpret, apply and effectively communicate them
- Maintain and develop effective and resilient financial processes and controls, which are fully compliant with University and other external requirements. Monitor and document as appropriate
- Lead the finance team in dealing effectively with all finance-related queries from academic and professional services staff, responding in a timely and professional manner
- Manage the production of timely and accurate financial information, including the production of regular and ad hoc reports, to the Head of Administration and Finance, Head of Department, budget holders, relevant departmental committees, the MPLS
Division and University, and as may be required from time to time to external research sponsors, funding agencies and auditors

- Ensure the full range of procedures are in place to monitor the department’s finances and related transactions on a monthly and quarterly basis, in line with University best practice
- Be fully aware of and follow the guidance in the University’s Expenses Policy and advise on how best to apply it

**Audit**

- Ensure that the department is prepared for visits from auditors and act as a key point of contact providing information and explanations as required
- Oversee the completion of the annual Financial Self-Assurance Return. Act as the department’s custodian of the financial information which supports, as evidence, the entries made in the Toolkit

**Research Grant Management**

- Oversee the financial management of all research funding, ensuring compliance with the terms and conditions of the awards and the University’s financial regulations
- Build and maintain excellent relationships with all stakeholders, including Principal Investigators, the Research Facilitation team, and HR team to ensure effective grant management
- Where necessary, take part at the negotiation stage of bids for larger grants
- Ensure expenditure reviews are carried out at least quarterly (monthly for major awards), providing management information to the department’s Finance Committee to ensure full and appropriate use of funding

**Studentships**

- Oversee the management of the department’s portfolio of funding for postgraduate studentships and related projects (such as CDTs and John Fell Fund awards), including funding from Doctoral Training Partnerships, research grants, donations and trust funds

**Trust Funds and Donations**

- Oversee management of all trust funds and donations affiliated with the department and ensure funds are used appropriately

**General**

- Lead and line manage members of the Finance team, overseeing their performance and professional development
- Member of the department’s Finance Committee, reporting regularly to it on the department’s finances
- Contribute to and develop strong networks with financial staff across the Division and University, particularly the MPLS finance team
- Any other duties commensurate with the level and nature of the post as requested by the Head of Administration and Finance
Selection criteria

Essential
- Strong accounting knowledge, evidenced by a CCAB or CIMA qualification
- Strong numeracy skills
- An excellent general level of education, evidenced by a good first degree or equivalent
- Experience of managing a finance function, including implementation of financial processes and controls
- Demonstrable ability to understand the information needs of others and communicate complex information in an understandable way, both orally and in writing, to a diverse range of audiences
- Effective interpersonal skills with the demonstrable ability to build good working relationships with financial, academic and professional services staff, and to consult, collaborate with, and respect the ideas of others as appropriate
- Expert financial analysis skills, with proven ability to apply them to problem-solving, evaluation of options, and results
- A high level of personal effectiveness, and the ability to work methodically and accurately, particularly when under pressure, and to meet tight deadlines
- High level of general IT competence across standard Microsoft Office packages, and advanced Excel skills
- Tact and discretion when dealing with sensitive and confidential information
- Demonstrable ability to inspire and lead a team, to foster a flexible, collaborative approach, to maximise the potential of individuals and to help them perform strongly in their roles

Desirable
- Knowledge of the UK research grant award systems
- Experience of Oracle-based finance systems
- Experience of working in the Higher Education sector

Pre-employment screening

Standard checks
If you are offered the post, the offer will be subject to standard pre-employment checks. You will be asked to provide: proof of your right-to-work in the UK; proof of your identity; and (if we haven’t done so already) we will contact the referees you have nominated. You will also be asked to complete a health declaration so that you can tell us about any health conditions or disabilities for which you may need us to make appropriate adjustments.

Please read the candidate notes on the University’s pre-employment screening procedures at: https://www.jobs.ox.ac.uk/pre-employment-checks

About the University of Oxford

Welcome to the University of Oxford. We aim to lead the world in research and education for the benefit of society both in the UK and globally. Oxford’s researchers engage with academic, commercial and cultural partners across the world to stimulate high-quality research and enable innovation through a broad range of social, policy and economic impacts.

We believe our strengths lie both in empowering individuals and teams to address fundamental questions of global significance, while providing all our staff with a welcoming and inclusive workplace that enables everyone to develop and do their best work. Recognising that diversity is our strength, vital for innovation and creativity, we aspire to build a truly diverse community which values and respects every individual’s unique contribution.
While we have long traditions of scholarship, we are also forward-looking, creative and cutting-edge. Oxford is one of Europe's most entrepreneurial universities and we rank first in the UK for university spin-outs, and in recent years we have spun out 15-20 new companies every year. We are also recognised as leaders in support for social enterprise.

Join us and you will find a unique, democratic and international community, a great range of staff benefits and access to a vibrant array of cultural activities in the beautiful city of Oxford.

For more information, please visit www.ox.ac.uk/about/organisation.

The Mathematical Institute

The Mathematical Institute, as Oxford’s Department of Mathematics is known, is one of the leading mathematics departments in the world. Our mathematical research, impact and environment were all ranked first in the UK in the 2014 Research Excellence Framework exercise, a government review of research in all UK universities. The Mathematical Institute is the focus of research into both fundamental mathematics and its applications, and our inclusive nature and overall size are key factors in the provision of an outstanding research environment for our members. The large number of faculty, postdocs and students in the Mathematical Institute, all supported by excellent facilities, allows us to maintain a critical mass in research groups encompassing a wide spectrum of mathematics, while our integrated nature fosters collaboration between fields. We also host a large number of academic visitors. Our web pages (www.maths.ox.ac.uk) provide comprehensive information about all of our activities.

The research activities of the Institute as a whole can be gauged from the web pages of the research groups and centres within the Institute (www.maths.ox.ac.uk/research). The range of our research interests is well reflected by the profile of our faculty as listed at www.maths.ox.ac.uk/people. Many members of the Institute have received prestigious prizes and other special recognition for their work; some recent examples can be found at www.maths.ox.ac.uk/news/awards-and-prizes.

The Mathematical Institute moved into the purpose-built Andrew Wiles Building in the University’s Radcliffe Observatory Quarter in September 2013. As well as providing offices for all staff and graduate students, it houses a range of other facilities available to members of the department, including the Whitehead Library, a large range of meeting rooms, teaching spaces, lecture rooms, and social spaces, and a small facility for carrying out table-top experiments. For more information, see www.maths.ox.ac.uk/about-us.

Teaching is central to the life of the Mathematical Institute and we have around 900 undergraduates on course, some on joint courses with other departments. We teach around 250 students each year across five taught master’s degree courses, and have over 250 doctoral students in residence at any one time. Our doctoral programme always attracts the best research students from across the world, and we have a broad mentoring and training programme.

The Mathematical Institute strives to ensure that all staff and students are given the opportunities and support they need to achieve their potential. We are committed to equality of opportunities and to advancing women’s careers. We support staff returning from long-term absence and provide flexible arrangements for staff with parental responsibilities. Further information about family support can be found in the Standard Terms and Conditions. Our Equality, Diversity and Inclusion Committee\(^1\) contributes to many aspects of our work, see

\(\text{1} \quad \text{The Mathematical Institute was a founding supporter of the London Mathematical Society’s Good Practice Scheme (www.lms.ac.uk/women/good-practice-scheme). We have held an Athena SWAN Bronze Award since 2013, upgraded to Silver in 2017.}\)
As part of the department’s commitment to openness, inclusivity and transparency, we strongly encourage applications from all who consider they meet the requirements of the post, and particularly from women and ethnic minorities.

For more information on the Mathematical Institute, please visit: [www.maths.ox.ac.uk](http://www.maths.ox.ac.uk)

The Mathematical Institute holds a silver Athena Swan award to recognise advancement of gender equality: representation, progression and success for all.

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**The Mathematical, Physical, and Life Sciences Division**

The Mathematical, Physical, and Life Sciences (MPLS) Division is one of the four academic divisions of the University. In the results of the six-yearly UK-wide assessment of university research, REF2014, the MPLS division received the highest overall grade point average (GPA) and the highest GPA for outputs. We received the highest proportion of 4* outputs, and the highest proportion of 4* activity overall. More than 50 per cent of MPLS activity was assessed as world leading.

The MPLS Division's 10 departments and 3 interdisciplinary units span the full spectrum of the mathematical, computational, physical, engineering and life sciences, and undertake both fundamental research and cutting-edge applied work. Our research addresses major societal and technological challenges and is increasingly focused on key interdisciplinary issues. MPLS is proud to be the home of some of the most creative and innovative scientific thinkers and leaders working in academe. We have a strong tradition of attracting and nurturing the very best early career researchers who regularly secure prestigious fellowships.

We have around 6,000 students and play a major role in training the next generation of leading scientists. Oxford's international reputation for excellence in teaching is reflected in its position at the top of the major league tables and subject assessments.

MPLS is dedicated to bringing the wonder and potential of science to the attention of audiences far beyond the world of academia. We have a strong commitment to supporting public engagement in science through initiatives including the Oxford Sparks portal ([http://www.oxfordsparks.net/](http://www.oxfordsparks.net/)) and a large variety of outreach activities. We also endeavour to bring the potential of our scientific efforts forward for practical and beneficial application to the real world and our desire is to link our best scientific minds with industry and public policy makers.

For more information about the MPLS division, please visit: [http://www.mpls.ox.ac.uk/](http://www.mpls.ox.ac.uk/)

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**How to Apply**

Applications are made through our e-recruitment system and you will find all the information you need about how to apply on our Jobs website [https://www.jobs.ox.ac.uk/how-to-apply](https://www.jobs.ox.ac.uk/how-to-apply).

Your application will be judged solely on the basis of how you demonstrate that you meet the selection criteria stated in the job description.
As part of your application you will be asked to provide details of two referees and indicate whether we can contact them now.

You will be asked to upload a CV and a supporting statement. The supporting statement must explain how you meet each of the selection criteria for the post using examples of your skills and experience. This may include experience gained in employment, education, or during career breaks (such as time out to care for dependants).

Please upload all documents as PDF files with your name and the document type in the filename.

All applications must be received by midday UK time on the closing date stated in the online advertisement.

Interviews are anticipated to take place in the week commencing Monday 12 July 2021.

**Information for priority candidates**

A priority candidate is a University employee who is seeking redeployment because they have been advised that they are at risk of redundancy, or on grounds of ill-health/disability. Priority candidates are issued with a redeployment letter by their employing department(s).

If you are a priority candidate, please ensure that you attach your redeployment letter to your application (or email it to the contact address on the advert if the application form used for the vacancy does not allow attachments).

**DATA PROTECTION:** All data supplied by applicants will be used only for the purposes of determining their suitability for the post, and will be held in accordance with the principles of the Data Protection Act 1998 and the department’s data protection policy.

[https://www.maths.ox.ac.uk/members/policies/data-protection/statement](https://www.maths.ox.ac.uk/members/policies/data-protection/statement)

Due to the large volume of recruitment that the department administers we are unable to provide feedback to non-shortlisted applicants.

**If you need help**

Help and support is available from: [https://hrsystems.admin.ox.ac.uk/recruitment-support](https://hrsystems.admin.ox.ac.uk/recruitment-support)

If you require any further assistance please email recruitment.support@admin.ox.ac.uk.

To return to the online application at any stage, please go to: [www.recruit.ox.ac.uk](http://www.recruit.ox.ac.uk).

Please note that you will receive an automated email from our e-recruitment system to confirm receipt of your application. **Please check your spam/junk mail** if you do not receive this email.
Important information for candidates

Data Privacy

Please note that any personal data submitted to the University as part of the job application process will be processed in accordance with the GDPR and related UK data protection legislation. For further information, please see the University’s Privacy Notice for Job Applicants at: https://compliance.admin.ox.ac.uk/job-applicant-privacy-policy. The University’s Policy on Data Protection is available at: https://compliance.admin.ox.ac.uk/data-protection-policy.

The University’s policy on retirement

The University operates an Employer Justified Retirement Age (EJRA) for all academic posts and some academic-related posts. The University has adopted an EJRA of 30 September before the 69th birthday for all academic and academic-related staff in posts at grade 8 and above. The justification for this is explained at: https://hr.admin.ox.ac.uk/the-ejra

For existing employees, any employment beyond the retirement age is subject to approval through the procedures: https://hr.admin.ox.ac.uk/the-ejra

There is no normal or fixed age at which staff in posts at grades 1–7 have to retire. Staff at these grades may elect to retire in accordance with the rules of the applicable pension scheme, as may be amended from time to time.

Equality of opportunity

Entry into employment with the University and progression within employment will be determined only by personal merit and the application of criteria which are related to the duties of each particular post and the relevant salary structure. In all cases, ability to perform the job will be the primary consideration. No applicant or member of staff shall be discriminated against because of age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex, or sexual orientation.
Benefits of working at the University

Employee benefits
University employees enjoy 38 days’ paid holiday, generous pension schemes, travel discounts, and a variety of professional development opportunities. Our range of other employee benefits and discounts also includes free entry to the Botanic Gardens and University colleges, and discounts at University museums. See https://hr.admin.ox.ac.uk/staff-benefits

University Club and sports facilities
Membership of the University Club is free for all University staff. The University Club offers social, sporting, and hospitality facilities. Staff can also use the University Sports Centre on Iffley Road at discounted rates, including a fitness centre, powerlifting room, and swimming pool. See www.club.ox.ac.uk and https://www.sport.ox.ac.uk/

Information for staff new to Oxford
If you are relocating to Oxfordshire from overseas or elsewhere in the UK, the University’s Welcome Service website includes practical information about settling in the area, including advice on relocation, accommodation, and local schools. See https://welcome.ox.ac.uk/
There is also a visa loan scheme to cover the costs of UK visa applications for staff and their dependents. See https://staffimmigration.admin.ox.ac.uk/visa-loan-scheme

Family-friendly benefits
With one of the most generous family leave schemes in the Higher Education sector, and a range of flexible working options, Oxford aims to be a family-friendly employer. We also subscribe to My Family Care, a service that provides practical advice and support for employees who have caring responsibilities. The service offers a free telephone advice line, and the ability to book emergency back-up care for children, adult dependents and elderly relatives. See https://hr.admin.ox.ac.uk/my-family-care

The University has excellent childcare services, including five University nurseries as well as University-supported places at many other private nurseries.

For full details, including how to apply and the costs, see https://childcare.admin.ox.ac.uk/

Disabled staff
We are committed to supporting members of staff with disabilities or long-term health conditions. For further details, including information about how to make contact, in confidence, with the University’s Staff Disability Advisor, see https://edu.admin.ox.ac.uk/disability-support

Staff networks
The University has a number of staff networks including the Oxford Research Staff Society, BME staff network, LGBT+ staff network and a disabled staff network. You can find more information at https://edu.admin.ox.ac.uk/networks

The University of Oxford Newcomers’ Club
The University of Oxford Newcomers' Club is an organisation run by volunteers that aims to assist the partners of new staff settle into Oxford, and provides them with an opportunity to meet people and make connections in the local area. See www.newcomers.ox.ac.uk.