



# Job Description



## Summary

<b>Job title</b>	Senior Financial Analyst
<b>Division</b>	University Administration and Services
<b>Department</b>	Finance Division
<b>Location</b>	Hythe Bridge Street, Oxford
<b>Grade and salary</b>	Grade 8: £45,585 - £54,395 per annum with a discretionary range to £59,421
<b>Hours</b>	Full time
<b>Contract type</b>	Permanent
<b>Reporting to</b>	Financial Planning and Analysis Manager
<b>Vacancy reference</b>	168865

## The role

As a highly skilled qualified accountant, you will have the experience or potential to be able to work in senior financial management roles, with the skills to be able to flourish whilst working on financial planning and modelling, and evaluating risk at a strategic level.

The role is a key part of a small team working centrally in the Finance Division providing management accounting support to University committees and senior staff. You will have the ability to work independently showing initiative and innovation and will need the skill set to support the development of reporting to senior members of the committees of the University including PRAC, Finance Committee and Council. This will include being able to explain complex financial structures and being ready to challenge current practices to deliver improvements to reporting processes. You will be a key part of the team providing a central co-ordination point for Academic Divisions and non-Academic departments and will support the Planning, Budgeting and Forecasting processes.

The Senior Financial Analyst role requires the skills and/or experience to be able to understand the technical accounting applied at the University and plays a vital role in explaining the links between the Financial Statements and Management Accounts. This is particularly important for the preparation of a number of key financial submissions throughout the year.

The Senior Financial Analyst maintains excellent working relationships with a large range of financial teams in a large Finance Division.

We welcome applications from all sections of the community. We aspire to build a truly diverse community which values and respects every individual's unique contribution.



## Responsibilities

1. Playing a large role in supporting the production of the University's TRAC return, which combines the University's financial statements and other data sources (space, academic time, student/staff numbers etc.) to break the University's activities down into three areas of activity: teaching, research and other. Decision making and problem solving is continuously required to bring the return together to ensure that the University return meets the statutory requirements and that the return is produced in time to meet the submission deadline:
  - The return is used to produce University level cost of teaching statistics as well as the indirect rates used on all research project costings. This task involves liaising with other parts of the University such as Estates, Research Services and Planning.
  - Requiring you to use your initiative, there is real potential for expanding the utility of the TRAC return and develop new analysis of interest to senior leaders, for instance through an improved understanding of the cost of teaching. The post holder will be required to use problem solving skills to extract the relevant analysis to support any new reports.
2. To assist in providing financial reporting on the University's central activities (eg scholarships, subsidiaries, University Colleges etc) on a monthly basis.
3. To provide expert knowledge and input to developments to the Budgeting and Forecasting System (BFT) to ensure that this is meeting Divisional and Central requirements.
4. Using your financial analysis skills and/or experience, to produce and distribute key financial control statistics which inform are reliable and are potentially ultimately reported through to Committee.
5. To be responsible for the production, monitoring and administration of the annual planning timetables. This requires excellent knowledge of key University deadlines and will require effective team working with divisional teams to avoid undue workload pressures.
6. Responsibility for the production and distribution of the annual budgeting guidelines which confirm, in particular, the key inflation statistics to be used in the process.
7. To be responsible for producing analysis of the University's performance in comparison to its peer Universities. The research involved in this task encompasses using the HEIDI system (to extract financial statistics from other Universities), reading other Universities' accounts and, if required, liaising with accountants from the other Universities involved.
8. To act as an effective channel of communication within the Finance Division, with particular focus on the relationship to the divisions and the wider University departments, ensuring that decisions and requests for information are effectively communicated.
9. The post holder may be required to deputise for the Financial Planning and Analysis Manager at both internal and external meetings.

## Selection criteria

### Essential selection criteria

- A recognised accounting qualification at CCAB/CIMA level or equivalent
- Broad-based, relevant accounting experience, with proven and demonstrable accounting skills, including financial planning. It would be advantageous, though not essential, to have experience of financial accounting.
- Strong and effective communication skills with finance and non-finance staff and an ability to operate effectively in an intellectually challenging environment.
- Computer literate, with strong understanding of financial systems, including experience of using such systems and delivering effective management reporting.
- Strong numeracy skills.
- High levels of personal effectiveness, particularly organisation, and the ability to focus on achieving deadlines whilst ensuring that timetables/plans can be met.

- Has excellent influencing skills as well as the ability to build and maintain relationships with a large network of key contacts.

#### Desirable selection criteria

- Experience of TRAC or dealing with UKRI
- Other expertise in using flexible reporting software such as PowerBI

#### 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 to support you.

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](http://www.ox.ac.uk/about/organisation).

#### Finance Division

The Finance Division is responsible for providing advice and information on financial matters affecting all departments, divisions and subsidiary companies of the University of Oxford. Our mission is to provide sound financial advice and timely information to academics, researchers, administrators and other stakeholders. For more information please visit: <https://finance.admin.ox.ac.uk/>

#### University Administration and Services

The central administrative sections of the University are collectively called University Administration and Services (UAS). UAS comprises structures to:

Support the University's core academic purposes of teaching, learning and research

Ensure the University can meet the requirements of government, funding bodies and other external agencies

Facilitate the attainment of the objectives set out in the [University's Strategic Plan](#).

UAS comprises University-wide functions, encompassing the key areas of academic administration, research services, finance, personnel, estates, IT services and external affairs as well as a number of other functions. Further information about the work of each section, together with contact details and the profiles of the head of each section, can be found on the [UAS sections page](#).

## How to apply

Applications are made through our online recruitment portal. Information about how to apply is available on our Jobs website <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.

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## 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).

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## If you need help

Application FAQs, including technical troubleshooting advice is available at:  
<https://staff.web.ox.ac.uk/recruitment-support-faqs>

Non-technical questions about this job should be addressed to the recruiting department directly:  
[uashr@admin.ox.ac.uk](mailto:uashr@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 online recruitment portal 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 very senior research posts at **grade RSIV/D35 and clinical equivalents E62 and E82** of 30 September before the 70<sup>th</sup> birthday. The justification for this is explained at: <https://hr.admin.ox.ac.uk/the-ejra>.

For **existing** employees on these grades, 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 other grades 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](http://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 dependants. 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 the Work+Family Space, 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](http://www.newcomers.ox.ac.uk).

### Oxford Research Staff Society (OxRSS)

A society run by and for Oxford University research staff. It offers researchers a range of social and professional networking opportunities. Membership is free, and all researchers employed by Oxford University are welcome to join. Subscribe at [researchstaff-subscribe@maillist.ox.ac.uk](mailto:researchstaff-subscribe@maillist.ox.ac.uk) to join the mailing list to find out about upcoming events and other information for researchers, or contact the committee on [committee@oxrss.ox.ac.uk](mailto:committee@oxrss.ox.ac.uk). For more information, see [www.ox.ac.uk/oxrss](http://www.ox.ac.uk/oxrss), Twitter @ResStaffOxford, and Facebook [www.facebook.com/oxrss](http://www.facebook.com/oxrss).