



MATHEMATICAL INSTITUTE
ANDREW WILES BUILDING

Job Description and Selection Criteria

Job title	Finance Officer (Studentships and Research Projects)
Division	Mathematical, Physical and Life Sciences
Department	Mathematical Institute
Location	Andrew Wiles Building, Radcliffe Observatory Quarter, Woodstock Road, Oxford, OX2 6GG.
Grade and salary	Grade 6: £32,332 - £41,732 per annum
Hours	Full time
Contract type	Permanent
Reporting to	Senior Finance Officer
Vacancy reference	170147
Additional information	This post is subject to a 12-month probationary period.

The role

As Studentship & Project Funding Officer you will be primarily responsible for managing the department's portfolio of funding for studentships. The funding for studentships is complex, with funding from various departmental, college, University and external sources. The post is the first point of contact for all studentship-related financial matters and is responsible for the day-to-day financial administration of studentships, as well as supporting the Finance Manager with setting and monitoring the annual budget for the studentship cost centres, and supporting the Senior Finance Officer and the CDT Administrators with the financial management of the department's DTPs and CDTs.

The postholder will also take responsibility for the financial administration of the Institute's departmental projects, such as John Fell Fund and Doctorial Prize Fund. The postholder will also assist the Senior Finance Officer with the management of the department's portfolio of research grants by undertaking tasks commensurate with the grade. A high level of specialised knowledge relating to the management of studentships and research grants will be required. The postholder will ensure that the financial administration of all studentships, and other assigned projects, is undertaken in accordance with departmental, University and



funder policy, and that all external funding is spent effectively and fully for the purposes agreed.

The postholder must be able to work to a high standard of accuracy and willing to assist the Senior Finance Officer across the research portfolio, and more generally within the finance team, when necessary.

Responsibilities

General

- Act as first point of contact for all financial matters related to studentships;
- Be aware of and follow the University's Financial Regulations and understand them sufficiently to interpret, apply and effectively communicate them;
- Maintain a detailed knowledge of studentship funders' terms and conditions in order to be proficient in studentship management

Studentships

The postholder will manage both internally and externally funded studentships from set-up and budget setting to monitoring and final reporting. This will include (but is not limited to):

- Understand and manage studentship costs across all departmental ledgers and maintain a live register of all active studentships, costs against budget and coding, reporting to the Finance Manager and Senior Finance Officer as required.
- Responsible for the annual budget setting and quarterly forecasting for all studentships within their relevant accounts (A1, A2, and B ledger) in line with departmental policy;
- Review studentship funding agreements from various sponsors and coordinate with Research Services for the authorisation of studentship agreements;
- Work with Research Accounts to prepare and authorise financial statements of expenditure for approval, in line with funder terms and conditions;
- Monitor the need for uplifts and extensions, co-ordinate requests for no-cost extensions on awards. Check that these have been actioned appropriately and that once agreement granted, Oracle systems have been updated;
- Review monthly balances on research pre-award, suspense accounts, control accounts and clear as appropriate;
- Reconcile and analyse transactions on the department's studentship cost centres at month end/year end and complete accrual journals for income, fees or stipends as required;
- Manage the payment of maintenance grants to students from the appropriate account.
- Manage payments to colleges for course fees, advising on the appropriate source of funds for coding;

- Manage the department's Student Travel Fund and Skills Training Fund in line with agreed department policy;
- Determining the number of studentships/amount of funding available to be awarded from each funding source and advise the department accordingly;
- Liaise with the Directors of Graduate Studies and Deputy Head of Academic Administration over the award and final allocation of funding during the annual postgraduate admissions cycle;
- Advise the CDT administrators on all relevant financial policies, procedures and regulations.
- Manage the financial administration of the department's DTP funded studentships including:
 - Allocate students to the department's various DTP accounts;
 - Track and monitor spend to ensure DTP funding is spent effectively and fully for the purposes agreed;
 - Provide information for DTP FES (final expenditure statement): checking that all expenditure is eligible and has been allocated against correct student/task.
- Support the financial administration of the department's CDTs, to include:
 - Setting and monitoring the annual budget for all CDT project accounts, and prepare quarterly forecasts;
 - Liaise with CDT administrators to arrange bursary payments;
 - Arrange and minute quarterly review meetings for CDTs;

Research and departmental project management

- Financial management of the portfolio of smaller departmental projects awarded via MPLS Division or the University, including GCRF, carers' and diversity awards, and seed funding, John Fell Fund, Doctoral Prize Fund;
- Support the management of the department's portfolio of research grants by undertaking tasks commensurate with the grade. This may include but is not limited to: producing award costings in the X5 system, validating project setups in Oracle, ensuring start certificates and grant activations are submitted in line with funder requirements, working with Research Accounts to prepare final statements of expenditure and collating data for projects undergoing external audit

Other

- Develop and maintain the procedures manual which covers the full range of duties relating to studentships, including drafting specific instructions for technical tasks;
- Supporting the development of information management systems that meet the needs of the department;
- Attend/undertake training as required and develop your professional and IT skills in order to carry out your role effectively;

- Undertake transaction processing as necessary, such as:
 - Approving expenses in SAP Concur for students charging costs to Student Travel Fund and Skills Training Fund;
 - Entering General Ledger/Project journals and transfers in the University's accounting system, Oracle Financials.
- Prepare reports on studentship funding, as required by the HAF, HOD and Finance Committee.
- Undertake any other tasks commensurate with the grade, as directed by the Finance Manager or Head of Administration & Finance.

Selection criteria

Essential selection criteria

The successful candidate will be expected to meet the following criteria:

- Educated to at least A-level standard or equivalent in at least one numerate subject
- Experience in studentships or research grants administration, in particular in managing award grants.
- Well-developed verbal and written communication skills, particularly the ability to interpret, clarify and explain complex information.
- Strong interpersonal skills, including tact and diplomacy, and the ability to establish good working relationships with a range of people and teams.
- Ability to work independently and as part of a team, ensuring high levels of communication, organising and prioritising your own workload in a busy environment, and taking personal responsibility for achieving deadlines
- Effective planning, organisational and time management skills, with the capacity to handle multiple projects and conflicting deadlines
- High level of attention to detail and accuracy
- Excellent IT skills, including *substantial* experience of Microsoft Excel
- Good financial literacy, including planning and managing budgets, presenting reports that include financial data, identifying trends and recommending/taking appropriate follow-up action

Desirable selection criteria

- Experience of working in Higher Education
- Experience of Oracle-based finance systems
- Experience of working in the area of student funding

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 have twice been ranked first in the UK, in the 2021 and 2014 Research Excellence Framework exercises, 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.

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 laboratory 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 with teaching relief, offer flexible working arrangements, and the department sponsors University nursery places to support the priority allocation of childcare to our staff. Further information about family support can be found below under University Benefits, Terms and Conditions. Our [Equality, Diversity & Inclusion Committee](#)¹ contributes to many aspects of our work.

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.

We have a number of family-friendly policies, such as the right to apply for flexible working, hybrid working, and support for staff returning from periods of extended absence. We are committed to ensuring an inclusive interview process and will reimburse up to £250 towards any additional care costs (for a dependent child or adult) incurred as a result of attending an interview for this position, which may not be applicable if the interviews are held remotely.

For more information on the Mathematical Institute, please visit: 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.

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. Oxford is widely recognised as one of the world's leading science universities and the MPLS Division is home to our non-medical sciences, with 10 academic departments that 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 tackles major societal and technological challenges – whether developing new energy solutions or improved cancer treatments, understanding climate change processes, or helping to preserve biodiversity, and is increasingly focused on key interdisciplinary issues. We collaborate closely with colleagues in Oxford across the medical sciences, social sciences and humanities, and with other universities, research organisations

¹ 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 Silver Award since 2016.

and industrial partners across the globe in pursuit of innovative research geared to address critical and fundamental scientific questions.

The disciplines within the MPLS Division regularly appear at the highest levels in rankings, including the Times Higher Education and QS world rankings. Nationally, the quality of the Division's research outputs and environment, and the resulting impact, was recognised through strong performances in the UK Research Excellence Framework in both 2014 and 2021.

MPLS is proud to be the home of some of the most creative and innovative scientific thinkers and leaders working in academe. Our senior researchers have been awarded some of the most significant scientific honours and we have a strong tradition of attracting and nurturing the very best early career researchers who regularly secure prestigious fellowships and faculty positions. MPLS continues in its work to support diversity in its staffing, seeing that it will bring benefits to all, and we are pleased to note that all academic departments in the Division hold Athena Swan Awards.

We have around 7,300 full and part-time students (including approximately 3,400 graduate 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 academics educate students of high academic merit and potential from all over the world. Through a mixture of lectures, practical work and the distinctive college tutorial system, students develop their ability to solve diverse mathematical, scientific and engineering problems.

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 (www.oxfordsparks.ox.ac.uk) and a large variety of outreach activities; these are crucial activities given so many societal and technological issues demand an understanding of the science that underpins them. We also bring the potential of our scientific efforts forward for practical and beneficial application to the real world and our desire, aided by the work of Oxford University Innovation and Oxford Sciences Innovation, is to link our best scientific minds with industry and public policy makers.

For more information about the MPLS division, please visit: www.mpls.ox.ac.uk

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 required to upload a curriculum vitae and a supporting statement. The supporting statement must explain how you meet each of the selection criteria for the post using example 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, quoting vacancy reference **170147**.

All applications must be received by **12.00 noon** UK time on **Monday 15 January 2024**.

Interviews are anticipated to take place on Tuesday 23rd January 2024.

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>

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

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 at vacancies@maths.ox.ac.uk.

To return to the online application at any stage, please go to: 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**, which with effect from 1 October 2023 will be 30 September before the 70th 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 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 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.