



UNIVERSITY OF LEEDS

## CANDIDATE BRIEF

**Faculty Business Planning Accountant, Leeds University Business School, Faculty of Business**



**Salary: Grade 7 (£33,199 – £39,609 p.a.)**

**Reference: LUBSC1401**

**Closing date: 25 June 2019**

**We will consider job share and flexible working arrangements**

## **Faculty Business Planning Accountant, Leeds University Business School, Faculty of Business**

**Do you have experience of working in a financial environment, with a proven track record of financial reporting, planning and forecasting principles? Are you customer focussed, with the ability to work effectively as part of a team, delivering a professional and supportive finance service to a wide range of stakeholders?**

The purpose of this role is to provide Business Partnering support in providing high quality financial management information, financial analysis and financial planning support to the Faculty of Business. This role reports to the Financial Planning and Business Analyst and supports the financial reporting, forecasting and the annual budgeting exercise.

You will be customer focussed and flexible in your approach and work as part of the faculty finance team. The role includes undertaking advanced and detailed financial analysis to determine financial performance at a Faculty, Divisional and level, and to support activity based costing and student number planning.

### **What does the role entail?**

As a Faculty Business Planning Accountant, you will:

- Provide support to the annual Integrated Planning Exercise financial submissions for the Faculty of Business, including the consolidation of non-staff budgets, the use of the University Resource Allocation Model, the adherence to agreed planning assumptions and the identification of risk factors;
- Provide support to the development and continuous improvement of efficient systems and processes within the Faculty to support robust planning, forecasting, monthly monitoring, and other financial returns and support colleagues in the financial management of their areas of control;
- Develop and maintain relationships with budget holders and their teams to provide advice and guidance on budget setting, budgetary control, variance reporting and forecasting and assist with the annual budgeting and forecasting exercises and variance reporting within the Faculty;





- Develop and maintain an understanding of financial issues relating to Faculty Funding and an awareness of the current issues to which responses may be needed;
- Support the Faculty Financial Planning and Business Analyst (FP&BA) in producing financial performance models, using appropriate activity based methodology, to support financial sustainability and investment decisions across all functional areas of the Faculty;
- Support the production of timely, accurate and high quality:
  - Monthly Monitoring and Reporting;
  - Quarterly Financial Forecasts;
  - Student Number Reporting Pack;
  - Student number plans;
  - Yearend reporting pack, inclusive of divisional and activity analyses, key performance indicators, divisional teaching loads, support service analysis and trend analysis;
- Provide supporting evidence demonstrating the Faculty's financial viability to accrediting Bodies, such as EQUIS, AACSB and AMBA;
- Work closely with colleagues from Strategy and Planning and Management Accounts ensuring service levels are met in respect of the collation and return of submissions that feed into University returns for TRAC, HESA and HEFCE.
- Contribute to the Yearend process on behalf of the Faculty;
- Ensure that full economic costing is embedded throughout the Faculty for all activities and work, and provide advice to non-finance colleagues to promote awareness and understanding;
- Provide cover, when required, for other members of the Faculty finance Team;
- Ensure the Business School's compliance with the University's financial procedures and audits;
- Provide advice as appropriate on the University's procedures and regulations.
- When required provide SAP financial reporting training and guidance to staff within the Faculty and to budget holders on financial planning and other finance related issues;
- Maintain and review account structures, ensuring they support activity based reporting and best practice in general;
- Develop and nurture networks across the University for the creation and sharing of knowledge and best practise;



- Liaise with and be a representative on formal and informal committees/working groups on financial matters on behalf of the Faculty finance team;
- Undertake continued professional development in consultation with the FP&BA. In particular ensuring continual development in relevant system practices;
- Undertake other duties as appropriate and as required by the FP&BA.

These duties provide a framework for the role and should not be regarded as a definitive list. Other reasonable duties may be required consistent with the grade of the post.

## What will you bring to the role?

As a Faculty Business Planning Accountant, you will have/be:

- A Part Qualified (CCAB) accountant or will have equivalent experience;
- A proven track record of financial reporting, planning and forecasting principles;
- Demonstrable experience of working in a finance role and successfully delivering financial support to strategic and operational planning;
- Significant experience of management accounting techniques, the budgeting process, management reporting and variance analysis;
- Significant experience of activity based costing and activity based reporting/management;
- Highly advanced IT skills comprising Microsoft Excel, Access, Powerpoint and SAP or equivalent;
- Excellent technical ability and evidence of developing and improving financial reporting to support organisational objectives;
- Effective presentation and written skills and an ability to produce high quality, meaningful and informative reports;
- Ability to manage complex and detailed datasets to produce clear and concise management information to support strategic and operational decision making;
- Strong communication skills/negotiation skills and the ability to tailor your message to your audience;
- Strong interpersonal skills and evidence of the ability to build good working relationships with colleagues both at a Faculty and University level;
- The ability to comprehensively understand the key business drivers and the strategic agenda in order to work in partnership with senior managers;



- Ability to work effectively under pressure with multiple demands on time and strict reporting deadlines;
- A strong team ethic and customer service approach;
- Evidence of sound judgement and problem solving skills;
- An enthusiastic, positive and committed approach.

You may also have:

- An appreciation of the higher education environment, funding and policy frameworks and understanding of the key factors, trends and challenges that influence organisational strategy and behaviour;
- Working knowledge of student information system comprising Banner, ODBC, Qlikview or equivalents;
- Working knowledge of Visual Basic for Applications.

## How to apply

You can apply for this role online; more guidance can be found on our [How to Apply](#) information page. Applications should be submitted by **23.59** (UK time) on the advertised closing date.

## Contact information

To explore the post further or for any queries you may have, please contact:

**Karen Hall, Faculty finance Manager**

Tel: +44 (0)113 343 31905

Email: [K.A.Hall@lubs.leeds.ac.uk](mailto:K.A.Hall@lubs.leeds.ac.uk)

## Additional information

### Working at Leeds

Find out more about the benefits of working at the University and what it is like to live and work in the Leeds area on our [Working at Leeds](#) information page.





### **Candidates with disabilities**

Information for candidates with disabilities, impairments or health conditions, including requesting alternative formats, can be found on our [Accessibility](#) information page or by getting in touch with us at [disclosure@leeds.ac.uk](mailto:disclosure@leeds.ac.uk).

### **Criminal record information**

#### **Rehabilitation of Offenders Act 1974**

A criminal record check is not required for this position. However, all applicants will be required to declare if they have any 'unspent' criminal offences, including those pending.

Any offer of appointment will be in accordance with our Criminal Records policy. You can find out more about required checks and declarations in our [Criminal Records](#) information page.

