### Job Related Information

This document includes information about the role for which you are applying and the information you will need to provide with your application.

#### 1. Role Details

<table>
<thead>
<tr>
<th>Vacancy reference</th>
<th>14249</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job title:</td>
<td>Finance and Planning Officer</td>
</tr>
<tr>
<td>Reports to:</td>
<td>Finance Manager</td>
</tr>
<tr>
<td>Salary:</td>
<td>£32,548 - £38,833</td>
</tr>
<tr>
<td>Terms and conditions:</td>
<td>Academic Related</td>
</tr>
<tr>
<td>Grade</td>
<td>7</td>
</tr>
<tr>
<td>Duration of post:</td>
<td>Temporary until July 2019</td>
</tr>
<tr>
<td>Working hours:</td>
<td>Part-time (21 hours per week)</td>
</tr>
</tbody>
</table>
| Location:         | Learning and Teaching Innovation  
                      Walton Hall |
| Closing date:     | 12:00pm (noon), Friday 2 February 2018 |
| Type of application form accepted: | Long version and covering letter |
|                   | Your covering letter, of no more than 500 words, should address why you are applying for the role and summarise your **two main attributes** that make you an ideal candidate for this post. **Without this document the panel will not be able to shortlist you** |
| Number of referees required: | 3 |
| Unit recruitment contact: | SPR-Recruitment@open.ac.uk |


2. Summary of duties

Purpose of role

Our key activities include:

- Providing financial information to operational LTI management
- Contributing and reporting on the strategic progress of the unit against the business plan
- Coordinating the annual budgeting process
- Recording, monitoring and reconciling income and expenditure, including forecasts and year-end.
- Regularly reviewing, updating, communicating procedures and administering any financial advice or training to colleagues across LTI
- Liaising with the Open University’s finance department, the faculties and other departments across the university with any financial matters
- Managing the purchase and control of materials stock for students and tutors

Main duties and responsibilities

1. To develop strong links and working relationships with administrative, operational and academic areas of the University
2. To be the first point of contact, giving advice, guidance and direction to operational managers to ensure they comply, control and meet their financial performance responsibilities
3. To respond to specific University requests for data and information relating to LTI as required.
4. To co-ordinate the collection and dissemination of management information relating to LTI activities to be included in the monthly performance reports
5. To produce compliant and accurate financial reports to specific deadlines
6. To provide support to planning and budgeting activities including forecasts and year-end
7. To assist in the preparation of annual documentation associated with the Inter Unit Planning and Co-ordination (IUPC) process
8. To regularly review, update, communicate and disseminate appropriate financial timetables, procedures and administer any required training on financial systems
9. To process external and internal payments, maintaining appropriate records and reports in accordance with the financial timetable
10. To undertake ad hoc tasks involving the provision of financial information relating to LTI
11. Person specification

### Education, qualifications and training

**Essential:** AAT or equivalent, or work experience at a comparable level  
Measured by:  
- Application  
- Test  
- Interview

**Desirable:**

### Knowledge, work and other relevant experience

**Essential:**  
- Experienced in Financial management and budgetary control.  
- Experienced in disseminating/communicating information to a variety of stakeholders  
Measured by:  
- Application  
- Test  
- Interview

**Desirable:**

### Personal abilities and qualities

**Essential:**  
- Ability to analyse numerical data  
- Ability to support and achieve collective goals as part of a team  
- Excellent organisational and administrative skills  
- Ability to generate and build good working relationships within LTI and the University; influencing and obtaining support for initiatives requiring a collaborative group effort  
- Excellent problem solving skills and an ability to take the initiative and ownership  
- Good ICT Skills email, spreadsheets, word processing and the Internet  
- Ability to work with sensitive/confidential data and excellent attention to detail  
- A Commitment to achieving deadlines – ‘A can do’ approach  
- Knowledge of and commitment to Equal Opportunities policies and practices.  
Measured by:  
- Application  
- Test  
- Interview

**Desirable:**
12. Role specific requirements e.g. Shift working

None.

5. About the unit/department

The Open University
The Open University (OU) transforms lives through education. It is the United Kingdom's only university dedicated to distance learning, and teaching over 170,000 people every year, the OU has become by far the largest university in the UK. The University promotes educational opportunity and social justice by providing high-quality university education to all who wish to realise their ambitions and fulfil their potential.

The Learning and Teaching Innovation Portfolio
The Learning and Teaching Innovation (LTI) Portfolio, led by Pro-Vice Chancellor, Professor Hazel Rymer, supports the University's strategic vision and plan, to increase student success through improved learning and teaching by driving forward, and leading on, digital innovation. The primary purpose of the Portfolio is to work closely with the University’s four faculties and the Pro-Vice Chancellor (Research and Academic Strategy) to deliver state of the art learning and teaching to part time learners, and those studying with us through partners.

Strategy Planning and Resources
Strategy Planning and Resources is a group of six teams within the Learning and Teaching Innovation portfolio which provides specialist support to the whole unit (of approx. 600 staff) in the areas of strategic and business planning, policy development, quality management, financial planning and control, staffing, curriculum management, project management, communications, and PVC support and administration.

6. How to obtain more information about the role or application process

If you would like to discuss the particulars of this role before making an application please contact Alison Davies on 01908 653649 or email: a.davies@open.ac.uk

If you have any questions regarding the application process please contact email: SPR-Recruitment@open.ac.uk.

7. The application process and where to send completed applications

Please ensure that your application reaches the University by: 12:00pm (noon) on Friday 2nd February 2018
Your application should include:

To be considered for this post, please ensure that you send a completed application form and a covering letter as set out below.

**Application form**

The selection panel will be paying particular attention to the following section of the application form: “Please use this space to describe briefly the nature of your present appointment or any other information you consider relevant to this application not covered elsewhere”.

**NB:** It is important that candidates complete all sections of the application form in full.

**Covering letter**

Please set out in no more than 500 words the following:

a) Why you are applying for the role
b) Your 2 main attributes which make you an ideal candidate for this post

*Without this document the panel will not be able to shortlist you.*

A CV is not required and will not be considered as part of the selection process.

*Please quote the correct vacancy reference for the post you are applying for.*

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**Post it to:**

<table>
<thead>
<tr>
<th>Name/Job title:</th>
<th>Staffing Assistant (LTI)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department/Unit:</td>
<td>Learning and Teaching Innovation</td>
</tr>
<tr>
<td>Address:</td>
<td>Library Building</td>
</tr>
<tr>
<td></td>
<td>The Open University</td>
</tr>
<tr>
<td></td>
<td>Walton Hall</td>
</tr>
<tr>
<td>Post Code:</td>
<td>MK7 6AA</td>
</tr>
<tr>
<td>Or e-mail your application to:</td>
<td><a href="mailto:SPR-recruitment@open.ac.uk">SPR-recruitment@open.ac.uk</a></td>
</tr>
</tbody>
</table>

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**8. Selection process and date of interview**

<table>
<thead>
<tr>
<th>The interview panel will be chaired by:</th>
<th>Alison Davies, Finance Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>The other members of the interview panel will be:</td>
<td>Justine Price, Finance and Planning Officer</td>
</tr>
<tr>
<td></td>
<td>Jen Isaac, Staffing Manager</td>
</tr>
<tr>
<td>Assessments and interviews will take place on:</td>
<td>Thursday 15th February 2018</td>
</tr>
</tbody>
</table>
The selection process for this post will include assessments and interviews, which are scheduled to be held on 15th February 2018 (shortlisted candidates will need to be available on this day).

The selection process for this post will include additional activities designed to assess your ability to meet criteria required in the post.

We will let you know as soon as possible after the closing date whether you have been shortlisted for interview.

Further details on the selection process will also be sent to shortlisted candidates.

We will contact successful candidates as soon as possible after the closing date whether you have been shortlisted for interview. Further details on the selection process will also be sent to shortlisted candidates.

If you do not hear from us by 9 February, you should assume that you have not been shortlisted for interview but we do thank you for your interest.

Applications received after the closing date will not be accepted.