



## **Application pack**

### **Finance Officer**

We are seeking an experienced, meticulous and digitally-savvy Finance Officer to join our small, dynamic and friendly team.

#### **About the Learned Society of Wales (LSW)**

The Learned Society of Wales is the national academy for arts and sciences. We champion excellence across all academic fields and beyond. We use the knowledge of the Society's experts to promote research, inspire learning, and provide independent policy advice. A Royal Charter charity with nearly 600 Fellows, LSW is highly regarded as an authoritative, independent, and credible voice in Welsh public life.

The Society was founded in 2010 and has rapidly gained support and recognition. We work closely with all the universities and other higher education partners in Wales, providing a national, independent space for collaborative activity. We also have strong relationships with the Welsh Government, the Senedd, and other national academies in England, Scotland and Ireland.

As a registered charity, the Society has a strong commitment to ensuring its work has public benefit. Our Council is our board of trustees and has overall responsibility for the Society's governance, strategy, activities and finances. We receive core funding from the nine universities in Wales as well as subscriptions from our Fellows. In addition to funding for specific initiatives by a wide range of partners we recently received funding from the Higher Education Funding Council for Wales for a programme of activities to develop a national support scheme for researcher development.

Our small, friendly and very committed staff team of eight, support the Council and broader Fellowship and are responsible for delivering the Society's activities. We have grown as a team and adapted how we work, and what we deliver over the past two years. We have also recently recruited a new CEO who brings with them a refreshed vision for the Society and how our team operates.

#### **About the role**

The Finance Officer is responsible for all aspects of the financial management of the Society. You will be responsible for the effective management of LSW's finances and financial records and for ensuring that we are compliant with all relevant accounting standards. You will be responsible for producing our accounts and for providing financial information and advice to the CEO, Treasurer and the rest of the team. You will enjoy operating independently with high levels of autonomy and engaging effectively with external partners, Fellows and suppliers, and you will take pride in making things run smoothly for the rest of the team. Our current Finance Officer is retiring in Summer 2022 so we are looking to appoint someone as soon as possible. For candidates with up to one month's notice period there will be a short handover period with the existing Finance Officer.

The Society has recently sharpened our focus on equality, diversity and inclusion. We want to ensure that the Society benefits from the widest range of talents and perspectives, and we're building this in to all our work.

We want to be a diverse Society and to reflect a diverse society. We are committed to making the Society welcoming and inclusive and encourage applications from under-represented groups.

## Key facts about this role

<b>Salary</b>	£22,847 – £27,924 (pro rata), depending on experience
<b>Pension and benefits</b>	The post-holder may join our pension scheme, with the employer and employee each contributing 5% of gross salary into the scheme each month. We provide enhanced sick pay and maternity pay that exceed the statutory minimum.
<b>Location</b>	Hybrid working arrangement – we anticipate the post-holder dividing their work between our office in Cardiff and their home (details to be agreed with line manager).
<b>Line manager</b>	Chief Executive
<b>Employment terms</b>	Part-time (0.6), permanent.
<b>Hours</b>	21 hours (3 days) per week, usually worked between Monday-Friday. There is scope for flexible working; the pattern of hours will be agreed with the line manager. The post-holder may occasionally be required to work during evenings and weekends.
<b>Annual leave</b>	The basic leave allowance is 25 days, to be taken as agreed with the line manager. We also provide 8 statutory days and 7 additional 'customary days'. All leave is pro rata.
<b>Travel</b>	The job requires occasional travel within Wales and overnight stays. Expenses will be reimbursed.

## Key duties

- Manage the Society's financial administration – raising and processing invoices and payments, purchase orders, processing expenses claims, preparing regular financial reports and monitoring budgets.
- Manage the recording of all financial transactions on XERO, and monitor all bank accounts and third party on-line service providers reports.
- Liaise with LSW's Accountant and provide all information required for the preparation of the Annual Accounts. Manage relationship with Independent Examiner and provide all information as needed.
- Prepare and present quarterly management reports to Finance Committee, and other reports and analysis for the CEO and Treasurer as required.
- Prepare and monitor specific project budgets, and liaise with funding partners on joint initiatives.
- Implement and further develop financial management systems and online processes to ensure compliance with accounting standards/concepts and best practice.
- Implement and oversee robust anti-fraud measures.
- Liaise with our external payroll provider (University of Wales Trinity Saint David HR) on all aspects of staff salary, benefits and deductions.

- Administer all aspects of the auto-enrolment staff pension scheme, and fulfil all requirements of the Pensions Regulator.
- Maintain the holiday, sickness, and toil/overtime records of the Society's staff.
- Manage the collection of Fellow's subscription payments and donations; liaise with Fellowship Officer as needed to communicate about subscriptions.
- Manage the administration of Gift Aid, and support other aspects of the Society's fundraising activities including funding campaigns.
- Assist with the administration of grant programmes e.g. sponsored events, research collaboration grants.
- Perform other duties as directed by the Chief Executive not included above, but consistent with the role.



## Person specification

Please ensure that when you complete the Supporting Statement section of the application form, you demonstrate how you fulfil each of the criteria marked Essential (and those marked Desirable where possible).

	Criteria	Essential	Desirable	
<b>Qualification</b>	Educated to NVQ 3 level in a relevant subject or equivalent level of qualification or significant equivalent previous experience	✓		
	A degree or equivalent		✓	
<b>Knowledge and experience</b>	Demonstrable experience in finance including setting and managing budgets, the preparation of financial accounts and supporting the production of an independent audit	✓		
	Good working knowledge and experience of finance and accounting software packages	✓		
	Evidence of developing financial management systems and online processes to ensure compliance with accounting standards/concepts and best practice	✓		
	Excellent ICT skills; working knowledge in the use of a range of computer software, including Microsoft Office applications (Word, Excel, Teams) and financial systems ( e.g. XERO, Stripe, Go Cardless)	✓		
	Experience of working in a subscriptions-based membership organisation and/or charity		✓	
<b>Skills, abilities and attitude</b>	Excellent organisational skills, including the ability to work independently, prioritising own workload and meeting deadlines	✓		
	Ability to work effectively as a member of a team and able to explain finances to all levels of the organisation	✓		
	Enthusiastic and self-motivated, with a positive attitude and flexible approach to own work and willingness to support a small team	✓		
	Strong ethics with an ability to work to high standards of accuracy and manage confidential data	✓		
	Excellent written and spoken communication skills	In English	✓	
		In Welsh		✓
	Commitment to equality, diversity and inclusion	✓		
Commitment to supporting the Society's development as a bilingual organisation	✓			

	Commitment to / interest in the Society's mission and aims, and ability to translate the goals to the smooth running of the organisation.	✓	
--	---	---	--

## How to apply

- If you would like more information before deciding whether to apply, please contact Amanda Kirk ([applications@lsw.wales.ac.uk](mailto:applications@lsw.wales.ac.uk)) to arrange an informal discussion.
- You must make your application using our official application form. Please provide all relevant information on the form, as we will not consider CVs or cover letters as part of your application. Please ensure that you save the final document in Word or PDF format.
- When you write the Supporting Statement, please let us know **how you meet each of the essential criteria** in the Person Specification (and the desirable criteria if possible). We recommend that you cover each of the criteria in order, using it as a heading; this will help us assess your application more easily. You should also tell us **why you are interested in this post**. Your statement should be no more than 500 words.
- Please email your application to **Amanda Kirk** ([applications@lsw.wales.ac.uk](mailto:applications@lsw.wales.ac.uk)) by **23.00 on 6 June 2022**.
- Please complete our Equal Opportunities Monitoring questionnaire at <https://www.smartsurvey.co.uk/s/B1H26X/>  
This is anonymous and will not be considered as part of the application process.

## What will happen next?

- We will send an email acknowledgement to all applicants. If you do not receive an acknowledgement before **10.00 on 7 June**, please contact us. We are not responsible for applications that do not reach us, or that arrive after the deadline.
- We will assess the applications and select a number of candidates for interview. If we select you, we will contact you directly. **We anticipate holding interviews during the week beginning 20 June**. If you have not been invited to interview within three weeks of the closing date, please consider your application to be unsuccessful.
- We will make a provisional offer of employment to our chosen candidate. We will then take up references and, if these are satisfactory, confirm the job offer.
- We reserve the right not to make an appointment if we judge that none of the candidates meets the required standard.