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Job Description

Post title: **Accountancy Assistant**

Date last updated/evaluated: January 2025

Author: Matthew Gallacher

Standard Occupation Code: Not applicable

School / Department: Professional Services

Faculty / Directorate: Finance Research Hub

Job Family: Management, Specialist and Administrative (MSA)

Grade: Level 2b

ERE Pathway (if applicable): Not applicable

Post reporting to: Accountant and/or Assistant Accountant

Post line report(s): None

Post base location: Hybrid: Campus / Home **:** Expectation 2 office days/week.

Job purpose: To carry out a range of professional tasks to assist with the full-lifecycle of research projects, including, but not limited to, support on application costings, institutional submissions to external funders, award set-up, post-award coordination etc. To provide research support and specialist guidance to academics, team members and finance colleagues.

 Work is supervised, but the post holder will typically have scope to adapt their approach, determine the sequence of work and use initiative to resolve common problems.

## Key accountabilities and indicative time allocation:

1. **30%**

Perform a range of complex standardised administrative, customer service and/or support activities requiring proficiency within established processes or specialisms.

To support academic colleagues with the preparation of externally funded research project costings, award set up and post award coordination. Completed in line with funder and University regulations in readiness for external submission. Provide specialist advice, support and guidance of project costings and awards using the University system of Worktribe.

1. **25%**

Apply a detailed working knowledge of specialised but established systems, processes and/or equipment to complete assigned tasks.

Administer and co-ordinate the financial and budgetary requirements of a range of research projects; develop an up-to-date knowledge of the costings and award stages of the project.

1. **10%**

Progress and resolve a range of enquiries and casework of varying complexity. Interpret and apply established procedures. Use initiative to identify and resolve common problems. Seek input from others when required and judge when to escalate more complicated cases or problems.

Once assigned, to be the point of contact for newly initiated/in-progress projects. Answering queries and resolving problems from academic colleagues and external customers, including accurate preparation of costings and awards, explanation of funder guidance, awards set up and acceptance, contracts guidance, and advising upon appropriated procedures to adopt in given situations.

1. **10%**

Plan and prioritise own short-term work activities. Clarify requirements, determine sequence of work and adapt approach if required, within overall requirements. Meeting financial processing requirements such as:

* make effective use of Worktribe and Agresso financial administrative processes; for example, customer set up.
* maintain monitoring tools for projects by setting up and reviewing personal reports for prioritisation of workload
* project house-keeping using University systems – Worktribe, OneDrive and Agresso
* handle correspondence from funding bodies, investigators and administrators regarding projects
1. **5%**

Manipulate, analyse and/or evaluate standard information or data. Prepare documentation or reports in a range of standardised formats to inform others and/or support decision making.

1. **5%**

Supervise junior colleagues performing a range of standardised or straightforward administrative, customer service and/or support tasks according to established processes and clear work instructions. Provide advice, guidance and on-the-job training as required.

This post will not include managerial experience or a direct report, but requires teamwork and the ability to share knowledge with your colleagues

1. **5%**

Maintain familiarity with related activities, services and key contacts, internally and externally. Work collaboratively and communicate effectively with others to achieve objectives. To liaise with other departments or external customers to source and exchange information; such as Faculty Finance, RIS, Tax, Compliance and Procurement as required; to obtain specific guidance to support research project costings and awards.

1. **5%**

Recognise and understand the importance of own work and how it contributes to the achievement of wider aims and objectives. Share good practice, suggest improvements and raise issues of concern where necessary.

1. **5%**

Any other duties as allocated by the line manager following consultation with the post holder.

Internal and external relationships:

* Departmental management and University senior management
* Other members of the department/University staff
* External customers

Special requirements:

n/a

# Person Specification – Skills and Competencies

All essential and desirable criteria outlined in this Person Specification will be assessed through a combination of recruitment application and CV, and where applicable numerical or written assessment.

**Knowledge, Experience and Qualifications**

Essential

Practical knowledge and experience in a relevant operational discipline. Practical knowledge may have been gained through some or all of the following:

* Relevant work experience
* Vocational training
* Formal qualification(s) equivalent to Level 2 or 3 of the Regulated Qualifications Framework e.g. AS or A Level, intermediate or advanced apprenticeship, or Level 2 or 3 award, certificate, diploma, NVQ.

Desirable

* Background in a Higher Education Institution.
* Experience with Microsoft packages (e.g. Word and Excel)
* Previous experience with using financial systems

**Teamwork and Communication**

Essential

* Contributes to team effectiveness by sharing information and supporting others.
* Ensures any supervised staff are clear about their role and responsibilities.
* Explains procedures and provides assistance to others.
* Seeks and clarifies detail as required.
* Ability to adapt well to change and service improvements.

Desirable

**Planning, Organisation and Resource Management**

Essential

* Demonstrates good knowledge of the role and its context.
* Effectively organises allocated work activities.
* Assists the organisation of non-standard work activities and events.
* Ability to work well with minimum supervision.

Desirable

* Proven background in managing multiple deadlines in a fast-paced environment

**Problem Solving and Initiative**

Essential

* Solves simple problems and adapts to changing circumstances within established practices and procedures.

Desirable

# Job Hazard Assessment

A full health clearance is required for this role where any hazards marked “**^**”, using the agreed Occupational Health referral template [available from here](https://sotonac.sharepoint.com/teams/HealthWellbeing/SitePages/Occupational-Health.aspx). Where a full health clearance is required, this will apply to all role holders, including existing members of staff.

## Physical Environment

Working outside **^** Not applicable

Exposure to noise levels >80dbA **^** Not applicable

Working with dust or fumes **^** Not applicable

Working with skin irritants **^** Not applicable

Working with chemicals (industrial or cleaning) **^** Not applicable

Working in a confined space **^** Not applicable

Working at height **^** Not applicable

Working with sewage **^** Not applicable

Contact with cytotoxins **^** Not applicable

Exposure Prone Procedure (EPP) work **^** Not applicable

Contact with clinical specimens or pathology work **^**  Not applicable

Direct patient care or patient contact Not applicable

Exposure to temperature extremes Not applicable

Frequent hand washing Not applicable

Ionising radiation Not applicable

## Psychological and Social Environment

Working shifts **^** Not applicable

Working nights **^** Not applicable

Lone working Not applicable

Working with children Not applicable

Exposure to persons with challenging behaviourNot applicable

Working with larger groups Not applicable

## Equipment, Tools and Machines

Working with vibrating machinery or tools **^** Not applicable

Driving duties e.g. LGV, PCVs, forklift trucks **^** Not applicable

Food handling Not applicable

Contact with latexNot applicable

## Physical Abilities

Prolonged physical movements or actions e.g. walking **^** Not applicable

Prolonged Standing or Sitting **^** Not applicable

Moving or handling heavy loads **^** Not applicable

Repetitive pulling or pushing **^** Not applicable

Repetitive climbing (steps, stools, ladders, stairs) **^** Not applicable

Repetitive crouching, kneeling or stooping Not applicable

Repetitive lifting Not applicable

Fine motor grips (e.g. pipetting) Not applicable

Repetitive reaching below shoulder height Not applicable

Repetitive reaching at shoulder height Not applicable

Repetitive reaching above shoulder height Not applicable

# Behaviours

Our [Inclusion and Respectful Behaviour Policy](https://www.southampton.ac.uk/about/governance/regulations-policies/policies/inclusion-respectful-behaviour) describes the expectations of everyone who is a part of our community.

Our **Southampton Behaviours** (below) outline the responsibilities we each have in working collaboratively to achieve our University strategy.

**Personal Leadership**

 - I take personal responsibility for my own actions and an active approach towards my development.

 - I reflect on my own behaviour, actively seek feedback and adapt my behaviour accordingly.

 - I demonstrate pride, passion and enthusiasm for our University community.

 - I demonstrate respect and build trust with an open and honest approach.

**Working Together**

 - I work collaboratively and build productive relationships across our University and beyond.

 - I actively listen to others and communicate clearly and appropriately with everyone.

 - I take an inclusive approach, value the differences that people bring and encourage others to contribute and flourish.

 - I proactively work through challenge and conflict, considering others’ views to achieve positive and productive outcomes.

**Developing Others**

 - I help to create an environment that engages and motivates others.

 - I take time to support and enable people to be the best they can be.

 - I recognise and value others’ achievements, give praise and celebrate their success.

 - I deliver balanced feedback to enable others to improve their contribution.

**Delivering Quality**

 - I identify opportunities and take action to make improvements.

 - I plan and prioritise efficiently and effectively, taking account of people, processes and resources.

 - I am accountable for tackling issues, making difficult decisions and seeing them through to their conclusion.

 - I encourage creativity and innovation in others, to deliver workable solutions.

**Driving Sustainability**

 - I consider the impact on people before taking decisions or actions that may affect them.

 - I embrace, enable and embed change effectively.

 - I regularly take account of external and internal factors, assessing the need for change, and gaining support to move forward.

 - I take time to understand our University strategy and communicate this to others.