

## **Job Description**

**Position:** Purchasing and Insurance Officer

**Academic School/Service:** Finance

**Reference:** FIN-031/P

**Grade:** Grade 7

**Status:** Permanent

**Hours:** Full Time (36.25 hpw)

**Reporting to:** Head of Finance

### **Main Function of the Position:**

To be responsible for the management of the University Group's Purchasing and Insurance functions. Ensure that the University obtains value for money from its procurement activities and that best purchasing practice, including legal compliance, is achieved from its procurement operations. Manage the Insurance portfolio to ensure that suitable cover is maintained for all risks and that any incidents that may give rise to a claim are promptly notified to the University's insurers and that claims that arise are properly managed.

Support other areas of the University Group on procurement and insurance matters as required by the Assistant Vice Chancellor (Resources).

### **Principal Duties and Responsibilities:**

#### **Purchasing and Procurement:**

1. Responsible for the development, implementation and provision of procurement advice and assistance across the University, in order to achieve the best possible value for money in all its purchasing activities, consistent with the need to acquire goods and services of an appropriate quality.
2. Manage and coordinate the ongoing development of the University's purchasing systems and procedures and ensure that all staff involved in purchasing/procurement are familiar with the procedures.
3. Maintain a Purchasing Manual and Notes for Guidance for use by all staff involved in the purchasing cycle, detailing strategy, policy and procedural guidelines and external purchasing legislation to which the University has to adhere.
4. Ensure that all purchases comply with legal requirements including The Public Contracts Regulations 2015 and the University's Financial Regulations and that necessary approvals are obtained.
5. Develop an awareness of the potential for cost effective purchasing, provide advice and guidance to budget managers and introduce and monitor a purchasing performance measurement system.

**Tender Process:**

6. Develop and maintain a tender procedure for the procurement of goods/services consistent with the University's Financial Regulations where the value of the proposed purchase is of sufficient value to require suppliers to tender for the business.
7. Promote a consistent approach towards tendering, to ensure compliance with EU Procurement Directives, statutory requirements and University Financial Regulations and other such relevant procurement related policies.
8. Maintain a central Tender Register for audit purposes.
9. Recommend the criteria and procedure for Post Tender Negotiations, undertaking and/or assisting as required.
10. Establish and amend as necessary the University's tender documentation including tender specifications and award criteria and develop terms and conditions of contracts.

**Operational Issues:**

11. Review, develop and operate a system for Vendor Appraisal of all major supplies to the University. Maintain a central Vendor Database of all approved suppliers.
12. Maintain and update the purchase order processing system and ensure its effective operation.
13. Assist budget managers and purchasing staff within departments in negotiating and procuring 'one-off' requirements for goods/services, as requested.
14. Determine the procurement training needs of all staff involved in purchasing and develop a training programme to meet those needs.
15. Represent the University, as required on procurement bodies such as the North Western Universities Purchasing Consortium, Association of University Purchasing Officers and Joint Procurement Policy Steering Group working parties.
16. Manage the activities of the University's NWUPC Commodity Group members and advise the Head of Finance periodically of the continued benefit, or otherwise of continued membership.
17. Manage the completion and return of all statistical analysis that may be required.

**Insurance:**

18. Manage the University's insurance portfolio ensuring that adequate cover is maintained in accordance with the Board of Governors risk appetite statement and maintain the Insurance Register.
19. Ensure that incidents that are required to be notified to insurers are notified promptly in accordance with the insurer's requirements.
20. Manage the annual insurance renewals, including the completion of the renewals questionnaire.
21. Provide an efficient insurance claims and advisory service.

**General:**

22. Ensure that documentation for all Purchasing procedures is properly prepared and maintained.
23. Carry out all duties in a manner which engenders an attitude of professional co-operation.
24. Ensure and maintain integrity and confidentiality of data and associated data protection requirements in line with corporate and statutory requirements
25. Be part of a team which will deliver training in a devolved financial management and other procedures.
26. Other duties as may be required commensurate with the scale and nature of the post as indicated in the Finance Office List of Procedures.

**Note:**

This is a description of the position requirements as it is presently constituted. It is the University's practice to periodically review job descriptions to ensure that they accurately reflect the position requirements to be performed and if necessary update to incorporate changes were appropriate. The review process will be conducted by the relevant manager in consultation with the post holder.

## Person Specification

<b>Position:</b> Purchasing and Insurance Officer		<b>Reference:</b> FIN-031/P	
<b>Academic School/Service:</b> Finance		<b>Priority (1/2)</b>	<b>Method of Assessment</b>
<b>Criteria</b>			
<b>1 Qualifications</b>			
1 a)	Honours degree in relevant subject area or equivalent level experience/qualification	1	CV/ Documentation
1 b)	Member of Chartered Institute of Purchasing and Supply or Member of the Chartered Insurance Institute	1	CV/ Documentation
<b>2 Skills / Knowledge</b>			
2 a)	Effective negotiator and persuasive when dealing with all levels of managers both inside and outside the University.	1	CV/Expression of Interest Interview
2 b)	Able to establish, maintain and operate procurement systems.	1	CV/Expression of Interest Interview
2 c)	Able to work effectively and identify and prioritise issues individually and as part of a team.	1	CV/Expression of Interest Interview
2 c)	Able to convey complex information clearly, accurately and concisely to lay audiences.	1	CV/Expression of Interest Assessment
2 d)	Customer focused skills, able to interact effectively with staff and stakeholders at all level.	1	CV/Expression of Interest Interview
<b>3 Experience</b>			
3 a)	Experience of operating in a Purchasing/contracting function in a complex organisation (in the public and/or private sector).	1	CV/Expression of Interest Interview
3 b)	Practical experience of operation of a computerised purchase order processing system.	2	CV/Expression of Interest Interview
3 c)	Experience of developing/negotiating commercial contracts	1	CV/Expression of Interest Interview
3 d)	Practical experience in insurance matters	2	CV/Expression of Interest Interview
3e)	Able to work to deadlines	1	CV/Expression of Interest Interview
<b>4 Personal Qualities</b>			
4 a)	Awareness of the requirements associated with operating within a customer service environment	1	CV/Expression of Interest Interview
4 b)	Ability, competence and confidence to lead and motivate others in procurement and insurance.	1	CV/Expression of Interest Interview
4 c)	Sensitive to individual differences and in dealing with colleagues/partners and stakeholders from different cultural backgrounds.	1	CV/Expression of Interest Interview
4 d)	Well-developed interpersonal skills.	1	CV/Expression of Interest Interview
4 e)	Commitment to continuous improvement and creative ways of working	1	CV/Expression of Interest Interview

<b>5</b>	<b>Other</b>		
5 a)	Willing to undertake staff development, which may take place outside the University	1	CV/Expression of Interest Interview
5 b)	Awareness of the principles of the Data Protection Act, Health and Safety, Freedom of Information Act, Prevent, and Bribery Act	1	CV/Expression of Interest Interview
5 c)	Commitment to the University's policy on equal opportunities and diversity	1	CV/Expression of Interest Interview
5 d)	Available to work flexibly and travel nationally as appropriate in order to meet the needs of the services	1	CV/Expression of Interest Interview

*Note:*

1. **Priority 1** indicates **essential** criterion – an applicant would be unsuccessful if unable to satisfy all Priority 1 criterion.
2. **Priority 2** indicates **desirable** criterion - applicants failing to satisfy a number of these are unlikely to be successful.
3. It is the responsibility of the employee to ensure any professional accreditation/membership remains current