

Job Description

Position:	Purchasing and Insurance Officer
School/Service:	Finance
Reference:	FIN-082/P
Grade:	Grade 7
Status:	Fixed-Term – 3 Months
Hours:	Full-Time
Reporting to:	Head of Finance

Main Function of the Position:

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.

Principal Duties and Responsibilities:

1. Assist and advise on the roll-out of the new Purchasing Card Policy, ensuring alignment with financial regulations and HMRC guidance.
2. Embed strict spend controls (eligible categories, transactions, limits) and ensure all transactions are fully evidenced, reconciled, and approved.
3. Deliver targeted training and communications to shift behaviours from convenience spend to policy-compliant business use only.
4. Promote responsible card usage through education and communication, changing user behaviour to align with procurement compliance.
5. Manage the system and initial card setup – ensure only approved MCC codes are applied and aiding in finding solutions to alternative suppliers.
6. Monitor purchasing card transactions, address non-compliance, and promote accountability in spending.
7. Review current procurement processes and identify gaps/opportunities Amazon Business can address.
8. Define business requirements (e.g., approved suppliers, spend categories, reporting needs).
9. Assess compliance with procurement policies, finance regulations, and audit requirements.
10. Communicate benefits, risks and expected outcomes of Amazon Business implementation.

11. Register and configure the Amazon Business account in line with organisational policy.
12. Set up approval workflows, spend limits, and user access roles.
13. Define purchasing categories aligned with existing procurement frameworks.
14. Configure restricted categories to prevent non-business purchases.
15. Assist with the implementation of other purchasing solutions such as embedded card, virtual cards, digital wallets and travel cards.
16. Ensure compliance with UK public procurement legislation (including the Procurement Act 2023 and Public Contracts Regulations 2015) and the University's Financial Regulations.
17. Provide expert procurement advice and guidance to support value for money, quality, and compliance.
18. Manage and develop purchasing systems, procedures, and documentation, ensuring staff awareness and adherence.
19. Oversee procurement activities, including requisitions, tenders, contracts, and approvals, ensure governance, transparency, and ethical practice.
20. Support service managers by developing tender documentation, managing supplier clarifications, leading evaluations, and advising on contract awards.
21. Monitor procurement performance, maintain accurate records, and report on compliance and value for money.
22. Promote procurement awareness across the University and build staff capability through guidance and knowledge sharing.
23. Ensure all procurement documentation is properly prepared, maintained, and aligned with statutory and institutional requirements.
24. Conduct comprehensive due diligence and vetting of new and existing suppliers, including financial health, sanctions/PEP screening, modern slavery compliance, data protection, information security, health & safety, and insurance.
25. Review, negotiate and approve supplier terms and conditions, ensuring all agreements meet legal, regulatory and institutional requirements.
26. Oversee supplier onboarding and maintain an accurate, auditable supplier master file, approving or rejecting supplier set-ups and amendments.
27. Ensure appropriate contractual protections (e.g., NDAs, data processing agreements, security schedules) are in place before data sharing or granting system access.
28. 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 tend for the business.

29. 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.
30. Maintain a central Tender Register for audit purposes.
31. Recommend the criteria and procedure for Post Tender Negotiations, undertaking and/or assisting as required.
32. Establish and amend as necessary the University's tender documentation including tender specifications and award criteria and develop terms and conditions of contracts.
33. Maintain and oversee the purchase order processing system and ensure its effective operation.
34. Assist budget managers and purchasing staff within departments in negotiating and procuring 'one-off' requirements for goods/services as requested.
35. Represent the University, as required on procurement bodies such as the North Western Universities Purchasing Consortium, Association of University Purchasing Offers and Joint Procurement Policy Steering Group working parties.
36. 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.
37. Manage the completion and return of all statistical analysis that may be required.
38. Contribute to the development, implementation and management of the contract registers.
39. Manage the University's insurance portfolio (e.g., property, liability, professional indemnity, cyber and travel) ensuring adequate cover is maintained in line with the Board of Governors' risk appetite, maintaining the Insurance register.
40. Liaise with insurance brokers and providers on policy placement, endorsements, declarations, renewals, and ensure accurate sums insured and schedules.
41. Oversee incident notification and insurance claims from first report to settlement, coordinating with departments, brokers, and legal advisors, and provide an efficient claims and advisory service.
42. Maintain up-to-date records of insurance coverage, claims history, and associated documentation.
43. Ensure suppliers and contractors carry adequate insurance and provide valid certificates.
44. Uphold professional standards, integrity, confidentiality, and compliance with data protection requirements.
45. Support staff training on procurement, financial management, and new policy rollouts (e.g., purchasing card policy)

46. Contribute to the ongoing development and improvement of procurement and insurance procedures.
47. Carry out all duties in a manner which engenders and attitude of professional cooperation.
48. Other duties as may be required commensurate with the scale and nature of the post as indicated in the Finance Officer List of Procedures.
49. Promote a culture of accountability and responsible spending.
50. Ensure a safe working environment and abide by university health and safety policies and practices and to observe the University's Equal Opportunities policy and Dignity at Work policy at all times.
51. Awareness of environmental and sustainability issues and a commitment to the University's associated strategy with respect to the performance / delivery of key responsibilities of the role.
52. Ensure and maintain integrity and confidentiality of data and associated data protection requirements in line with statutory and corporate requirements.

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.

Please note that this appointment may be subject to Disclosure and Barring Clearance.

Person Specification

Position: Purchasing and Insurance Officer		Reference: FIN-082/P	
School/Service: Finance		Priority	Method of Assessment
Criteria		(1/2)	
1 Qualifications			
1 a)	Honours degree in relevant subject area or equivalent level experience	Priority 1	CV / Documentation
1 b)	Member (or working towards) of Chartered Institute of Purchasing and Supply or Member of the Chartered Insurance Institute.	Priority 1	CV / Documentation
2 Skills / Knowledge			
2 a)	Effective negotiator and persuasive when dealing with all levels of managers both inside and outside the University.	Priority 1	CV / Interview
2 b)	Able to establish, maintain and operate procurement systems.	Priority 1	CV / Interview
2 c)	Thorough understanding of the procurement rules, contract development and administration.	Priority 1	CV / Interview
2 d)	Able to work effectively and identify and prioritise issues.	Priority 1	CV / Interview
2 e)	Thorough understanding of contractual processes.	Priority 1	CV / Interview
2 f)	Able to convey complex information clearly and accurately.	Priority 1	CV / Interview
2 g)	Customer focused skills, able to interact effectively with staff.	Priority 1	CV / Interview
3 Experience			
3 a)	Experience of operating in a Purchasing/contracting function in a complex organisation (in the public and/or private sector).	Priority 1	CV / Interview
3 b)	Experience of using procurement and financial management systems.	Priority 2	CV / Interview
3 c)	Experience of developing/negotiating commercial contracts.	Priority 1	CV / Interview
3 d)	Practical experience in insurance matters	Priority 2	CV / Interview
3 e)	Experience in contract management processes	Priority 1	CV / Interview
3 f)	Experience of working within public sector regulations	Priority 1	CV / Interview
3 g)	Able to work to deadlines	Priority 1	CV / Interview
4 Personal Qualities			
4 a)	Awareness of the requirements associated with operating within a customer service environment	Priority 1	Interview
4 b)	Ability, competence and confidence to lead and motivate others in procurement and insurance.	Priority 1	Interview

4 c)	Sensitive to individual differences and in dealing with colleagues/partners and stakeholders from different cultural backgrounds.	Priority 1	Interview
4 d)	Strong interpersonal skills and a commitment to teamwork.	Priority 1	Interview
4 e)	Commitment to continuous improvement and creative working.	Priority 1	Interview
5	Other		
5 a)	Willing to undertake staff development, which may take place outside the University	Priority 1	Interview
5 b)	Awareness of the principles of the Data Protection Act, Health and Safety, Freedom of Information Act, Prevent and the Bribery Act	Priority 1	Interview
5 c)	Commitment to the University's policy on equal opportunities and diversity	Priority 1	Interview
5 d)	Available to work flexibly and travel as appropriate in order to meet the needs of the services	Priority 1	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
4. Employees are expected to have access to suitable IT equipment and broadband internet access at home to work remotely if required