

## JOB DESCRIPTION

# Head of Finance Advisory

<b>ROLE TITLE</b>	Head of Finance Advisory
<b>SECTION/DIVISION:</b>	Financial Services Division (FSD), Finance Advisory
<b>REPORTS TO:</b>	Chief Financial Officer
<b>DIRECT REPORTS (FTE):</b>	5
<b>INDIRECT REPORTS (FTE):</b>	37 approx.
<b>PRIMARY PURPOSE OF THE ROLE:</b>	<p>To lead, develop and manage the provision of high quality finance advisory services across the University through the provision of expert financial advice, analysis and support that strengthens the University and client portfolio finances, supports financial probity, quality financial management and effective decision making.</p> <p>The role leads and manages the high performance delivery and coordination of finance services activities such as month-end accounting, internal financial reporting, financial forecasting, budgeting activities, financial modelling and analysis and bespoke financial advisory activities. A client focused, service excellence delivery orientation is critical to the success of this role.</p>
<b>ACCOUNTABILITIES:</b>	<p>Lead the provision of consistent, embedded finance services to a large and diverse group of stakeholders, who often hold differing goals, perspectives and expectations.</p> <p>In consultation with key client stakeholders, anticipate priorities and contribute to FSD strategic and business planning processes.</p> <p>Create the Finance Advisory Services strategy and develop an annual work plan that translates strategy into meaningful operational service delivery plans, goals and objectives.</p> <p>Implement effective budgeting and business planning for the Finance Advisory unit; and ensure staff are deployed astutely providing coverage of services across the client portfolios.</p> <p>Lead, establish and monitor service delivery standards and performance measures to ensure expectations are clear, support a high performance culture, and form the basis for evaluation of effectiveness and improvement planning. Proactively seek feedback from multiple channels to drive customer service excellence.</p> <p>Partner with senior executives in the University and use financial information to analyse and determine the underlying financial strength of the client portfolios and recommend how to remedy deficiencies and mitigate financial risks.</p> <p>Lead, develop and monitor effective and robust financial controls, systems and frameworks to ensure the integrity of business critical financial information; and effective financial and risk management in line with professional standards, delegations, policy and legislative requirements.</p> <p>Manage, develop, analyse and review a variety of highly complex financial documents, reports and proposals including business cases, funding submissions, briefing and discussion papers, ensuring comprehensiveness, accuracy and timeliness.</p>

Provide appropriate, reliable and trusted financial advice, recommendations, analysis, commentary and expert technical interpretation on highly complex operational and strategic matters, in a manner easily interpreted by stakeholders.

Evaluate and respond to highly sensitive and contentious operational or service delivery issues to ensure that financial, reputational and business risks are minimised.

Build and foster the relationship with the Manager Finance Services (Shared Services), to ensure seamless provision of finance services.

Lead and implement a culture of innovation, high performance and service excellence, including investigating ways to improve effectiveness by harnessing technology.

Actively participate and effectively work as part of the FSD Leadership Team by collaborating with peers, providing advice, and contributing to business cases and special reports/papers.

Develop business continuity and other emergency and recovery plans, ensuring such plans are tested regularly in accordance with University frameworks.

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**KEY RELATIONSHIPS:**

Internal  
Chief Operating Officer  
Senior leaders of various Client Portfolios receiving services from Finance Advisory  
Other senior executives and managers across the University  
Manager, Finance Services (Shared Services)  
Financial Services Division staff.  
University Auditor  
University Compliance Analyst

External  
Senior executives with external organisations such as DHBs, research funding bodies, consultants  
Peers from other universities  
Key participants in sectors that provide financial advisory services.

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**QUALIFICATIONS & EXPERIENCE:**

Essential:  
Tertiary level qualification or recognised qualification(s) appropriate to the role. Professional standing for current membership or eligibility for membership of a recognised New Zealand accounting body.  
10+ years' experience of managing and providing finance services in a medium size or complex organisation.  
Extensive experience in budget management, financial management, modelling, and development and implementation of financial management policy, systems, controls and reporting at a senior level.

Preferred:  
Postgraduate qualification or a relevant recognised professional credential.  
10+ years' management experience, 5+ years' of which is in a leadership capacity.

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**TECHNICAL SKILLS AND KNOWLEDGE:**

High degree of computer literacy and numerical data analysis skills - advanced Excel; proficiency in the Microsoft suite of programmes.  
Highly proficient in a range of financial and accounting software and systems in a complex financial environment.  
Experience with Finance One an advantage

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**SPECIAL REQUIREMENTS:**

Some travel may be required to attend other University sites.

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**DIRECT BUDGET ACCOUNTABILITY:**

Operating budget of circa \$4.5M per annum

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**HEALTH AND SAFETY:**

Act and work in a manner compliant with current health and safety at work legislation and University procedures, frameworks and guidelines. Role model safe behaviour and practices, share the responsibility to prevent harm and contribute to a safe campus and work environment, including raising workplace health and safety concerns for self, students, visitors and other staff.

**SUSTAINABILITY:**

Act in a manner consistent with the University's sustainability commitments; role-modelling sustainable practices, with a particular emphasis on minimising the environmental impact of day-to-day activities.

**CAPABILITY FRAMEWORK:**

Capability Group	Capability Name	Level
<b>ENGAGE</b>	Communicate Effectively	Advanced
	Commit to Customer Service	Advanced
	Work Collaboratively	Adept
	Influence and Negotiate	Adept
<b>ENABLE</b>	Deliver Results	Advanced
	Plan and Prioritise	Advanced
	Think and Solve Problems	Advanced
	Demonstrate Accountability	Advanced
<b>PERSONAL ATTRIBUTES</b>	Display Resilience and Courage	Advanced
	Act with Integrity	Advanced
	Manage Self	Advanced
	Value Diversity	Adept
<b>PEOPLE MANAGEMENT</b>	Manage and Develop Capability	Adept
	Inspire Direction and Purpose	Advanced
	Optimise Work Outcomes	Advanced
	Change and Innovation	Adept
<b>LANGUAGE AND CULTURE</b>	Te Reo	Intermediate
	Tikanga Māori	Adept

## CAPABILITY FRAMEWORK DESCRIPTORS

### Head of Finance Advisory



Communicate Effectively	Commit to Customer Service	Work Collaboratively	Influence and Negotiate
<i>Communicate clearly, actively listen to others and respond with respect</i>	<i>Provide customer centric services in-line with the University's and organisational objectives</i>	<i>Collaborate with others and value their contribution</i>	<i>Gain consensus and commitment from others and resolve issues and conflicts</i>
ADVANCED	ADVANCED	ADEPT	ADEPT
<p>Present with credibility, engage varied audiences and test levels of understanding. Adjust style and approach to optimise outcomes</p> <p>Translate technical and complex information concisely for diverse audiences</p> <p>Actively listen and create opportunities for others to contribute to discussion and debate</p> <p>Write fluently and persuasively in a range of styles and formats</p>	<p>Promote a culture of customer service excellence in the organisation</p> <p>Initiate and develop partnerships with customers to define and evaluate service performance outcomes</p> <p>Actively seek customer feedback and promote and manage service relationships both within the organisation and with external parties</p> <p>Liaise with senior stakeholders on key issues and provide expert and influential advice</p> <p>Identify and incorporate the interests and needs of customers in operational process design</p>	<p>Encourage a culture of recognising the value of collaboration</p> <p>Build co-operation and overcome barriers to information sharing and communication across teams and work units</p> <p>Share lessons learned across teams and work units</p> <p>Identify opportunities to work collaboratively with other areas to solve issues and develop better processes and approaches to work</p>	<p>Negotiate from an informed and credible position</p> <p>Lead and facilitate productive discussions with staff and stakeholders</p> <p>Encourage others to talk, share and debate ideas to achieve a consensus</p> <p>Pre-empt and minimise conflict. Recognise and explain the need for compromise</p> <p>Influence others with a fair and considered approach and sound arguments</p>

Deliver Results	Plan and Prioritise	Think and Solve Problems	Demonstrate Accountability
<i>Achieve results through efficient use of resources and a commitment to quality outcomes</i>	<i>Plan to achieve priority outcomes and respond flexibly to changing circumstances</i>	<i>Think, analyse and consider the broader context to develop practical solutions</i>	<i>Be responsible for own actions, adhere to legislation and policy and proactively address risk</i>
ADVANCED	ADVANCED	ADVANCED	ADVANCED
<p>Be accountable for outcomes and drive a culture of achievement and acknowledge input of others. Seek and apply the expertise of key individuals to achieve organisational outcomes</p> <p>Investigate and create opportunities to enhance the achievement of organisational objectives</p> <p>Ensure others understand that on-time and on-budget results are required and how overall success is defined. Progress organisational priorities and ensure effective acquisition and use of resources</p> <p>Control output of work unit(s) to ensure organisational outcomes are achieved within budget</p>	<p>Undertake strategic planning to ensure work unit(s) activity is aligned with University strategy. Monitor and evaluate progress and outcomes to inform future planning</p> <p>Ensure work unit(s) plans and goals are clear and appropriate including contingency provisions. Monitor progress of initiatives and make necessary adjustments</p> <p>Anticipate and assess the impact of changes to work unit(s) plans and initiatives, such as changing University, tertiary sector/economic conditions, and respond appropriately</p> <p>Consider the implications of a wide range of complex issues, and adjust work unit(s) priorities when necessary</p>	<p>Undertake objective, critical analysis to draw accurate conclusions that recognise and manage contextual issues</p> <p>Engage in critical analysis of complex issues, weigh up alternatives and identify the most effective solutions, taking into account the wider organisational context</p> <p>Explore a range of possibilities and creative alternatives to contribute to systems, process and business improvements</p> <p>Implement systems and processes that underpin high quality data gathering and analysis</p>	<p>Design and develop systems to establish and measure accountabilities and outcomes</p> <p>Incorporate sound risk management principles and strategies into planning. Ensure accountabilities are exercised in line with operational goals</p> <p>Monitor and maintain operational area knowledge of and compliance with legislative and regulatory frameworks</p> <p>Model the highest standards of financial probity, demonstrating respect for University monies and other resources</p>



## PERSONAL ATTRIBUTES

Display Resilience and Courage	Act with Integrity	Manage Self	Value Diversity
<i>Be open and honest, prepared to express your views, and willing to accept and commit to change</i>	<i>Be ethical and professional and act in keeping with the University's values</i>	<i>Show drive and motivation, a measured approach and a commitment to learning</i>	<i>Show respect for diverse backgrounds, experience and perspectives</i>
ADVANCED	ADVANCED	ADVANCED	ADEPT
<p>Stay calm and act constructively in highly pressured and unpredictable environments</p> <p>Give constructive and honest feedback and advice using appropriate manner and tone in the face of strong, contrary views</p> <p>Accept criticism of own ideas and respond in a thoughtful and considered way</p> <p>Welcome new challenges and persist in raising and working through new and difficult issues</p> <p>Develop effective strategies and show decisiveness in dealing with emotionally charged situations, difficult and controversial issues</p>	<p>Represent the organisation in an honest, ethical and professional way and model the highest standards of ethical behaviour and reinforce them in others</p> <p>Promote a culture of integrity and professionalism within the organisation. Ensure others understand and comply with the legislation and policy framework within which they operate</p> <p>Monitor ethical practices, standards and systems and reinforce their use. Act on reported breaches of rules, policies and guidelines</p>	<p>Act as a professional role model for colleagues, set high personal goals and take pride in their achievement</p> <p>Seek challenging goals and show commitment to their achievement</p> <p>Actively seek, reflect and integrate feedback to enhance own performance, showing a strong capacity and willingness to modify own behaviours</p> <p>Take the initiative and act in a decisive way and maintain a high level of personal motivation when faced with challenging circumstances</p>	<p>Seek to promote the value of diversity for the organisation</p> <p>Recognise and adapt to individual differences and working styles</p> <p>Support initiatives that create an environment in which diversity is valued</p>



## PEOPLE MANAGEMENT

Manage and Develop Capability	Inspire Direction and Purpose	Optimise Work Outcomes	Change and Innovation
<i>Engage and motivate staff and develop capability and potential in others</i>	<i>Communicate goals, priorities and vision and recognise achievements</i>	<i>Manage resources effectively and apply sound workforce planning principles</i>	<i>Support, promote and champion change, and assist others to engage with change</i>
ADEPT	ADVANCED	ADVANCED	ADEPT
<p>Define and clearly communicate roles, responsibilities and performance standards to achieve team/work unit outcomes</p> <p>Develop team/work unit plans that take into account team capability, strengths and opportunities for development</p> <p>Provide regular constructive feedback to build on strengths and achieve results</p> <p>Coach staff and encourage professional development and continuous learning</p> <p>Address and resolve team and individual performance issues, including unsatisfactory performance in a timely and effective way</p>	<p>Promote a sense of purpose and work with others to translate strategic direction into operational goals and build a shared understanding of the link to core organisational outcomes</p> <p>Build a shared sense of direction, clarify priorities and goals and inspire others to achieve them. Work to remove barriers to achievement of goals</p> <p>Implement performance development standards and frameworks to align workforce capability with the organisation's current and future priorities and objectives</p> <p>Create opportunities for recognising and celebrating high performance at the individual and team level</p>	<p>Develop workforce plans that effectively distribute organisational resources to achieve organisational goals</p> <p>Plan for strategic allocation of people and resources that links to wider organisational aims and goals</p> <p>Encourage others to strive for ongoing performance improvement and excellence</p> <p>Align systems and processes to encourage improved performance and outcomes</p>	<p>Actively promote change processes to staff and participate in the communication of change initiatives across the work unit(s). Seek and foster new ways of doing things</p> <p>Provide guidance, coaching and direction to individuals and others managing uncertainty and change</p> <p>Identify cultural barriers to change and implement strategies to address these</p>



## LANGUAGE & CULTURE

Te Reo	Tikanga Māori
<i>Develop understanding and use of te reo Māori (Māori language)</i>	<i>Create knowledge and use of tikanga Māori (Māori cultural practices) in the work place</i>
INTERMEDIATE	ADEPT
<p>Demonstrate use of te reo Māori words and phrases in appropriate work place settings</p> <p>Has prepared and can communicate accurately own mihi if required in the work place context</p> <p>Take part in opportunities to practice and extend own language capability</p>	<p>Engage with subject matter experts and consider the University's Māori Strategic Framework principles when undertaking work planning activity</p> <p>Model good practices and encourage others to adopt work place practices that show sensitivity for tikanga Māori</p> <p>Has good knowledge of the Articles and Principles of Te Tiriti o Waitangi and encourages understanding in others</p> <p>Encourage others to extend their understanding and knowledge of tikanga Māori</p>