

## JOB DESCRIPTION

### Associate Finance

<b>ROLE TITLE</b>	Associate Finance
<b>SECTION/DIVISION:</b>	Financial Services Division, Finance Advisory
<b>REPORTS TO:</b>	Either Manager Divisional Finance or Manager Finance
<b>DIRECT REPORTS:</b>	Nil
<b>INDIRECT REPORTS (FTE):</b>	Nil
<b>PRIMARY PURPOSE OF THE ROLE:</b>	<p>Provide a range of financial advisory services to one or more work areas including financial advice, analysis and day-to-day support to managers that strengthens the work area's finances, supports financial probity, quality financial management and effective decision making.</p> <p>The role is part of the Financial Services Division, flexibly providing finance-related services, across the University. A client focused, service excellence delivery orientation is critical to success in this role.</p>
<b>ACCOUNTABILITIES:</b>	<p>Provide a range of financial advisory activities to work area(s) such as accounting including month end accounting; financial reporting and analysis; financial forecasting and budgeting services including financial and accounting services, analysis, modelling and reporting for the project lifecycle of research grants and CCWs; identification, development and tracking of cost saving initiatives and efficiencies; cost recovery and analysis activities; and identification, analysis and interrogation of variances, financial status and issues of the work area(s).</p> <p>Be the financial point of contact for Head(s) of the work area(s) and proactively partner with managers to better appreciate business needs. Anticipate and be responsive to the needs and issues of the work area.</p> <p>Analyse and action requests in order to prioritise matters, and take action to facilitate or provide resolution and problem solving, referring where appropriate.</p> <p>Implement accepted financial management controls, systems and frameworks across the work area(s) in order to ensure the integrity of business critical financial information and effective financial and risk management in line with all required standards.</p> <p>Prepare, analyse and explain a variety of standard financial statements, schedules, variance reports and other finance reports accurately and efficiently. Initiate, develop and submit specialised financial documents, reports and proposals such as business cases, funding submissions, briefing and discussion papers, ensuring comprehensiveness, accuracy and timeliness to support the achievement of business requirements.</p> <p>Provide appropriate, reliable and trusted financial advice and recommendations on operational matters, in a manner easily interpreted by stakeholders.</p> <p>Evaluate and respond to operational or service delivery issues to ensure that financial, reputational and business risks are minimised.</p> <p>Work collaboratively with Ask Otago (the contact centre) and Finance Services (Shared Services), to deliver an integrated and seamless suite of finance services.</p>

Collaborate effectively with peer Associates - Finance, other stakeholders in the work area and Finance Services (Shared Service) to provide feedback into the finance function for enhancing the effectiveness and efficiency of financial and accounting services ; and to support leveraging collective knowledge and the provision of a consistent level of service

Undertake a regular review of financial transactions within the work area to identify errors, variances or discrepancies. Investigate and resolve, or escalate as appropriate.

Perform Departmental Health & Safety Officer (DHSO), first aid and/or fire warden duties (if required)

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**KEY RELATIONSHIPS:**Internal

Heads of Department, managers and staff in the work area who receive finance services including Principal Investigators (where applicable).  
Shared Services including Ask Otago, Finance Services, HR Services and Operations  
Financial Services Division staff  
Research and Enterprise Division staff (where applicable)

External

Dependent upon the work area and the requirements of the work area.

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**QUALIFICATIONS & EXPERIENCE:**Essential

Recognised qualification(s) appropriate to the role.  
5+ years' finance experience relevant to the role.  
Knowledge and some experience in budget management, financial management, accounting and modelling, and implementation of financial management and accounting policy, systems, controls and reporting arrangements.

Preferred:

Tertiary level qualification in an accounting/finance discipline Knowledge of policies and procedures of various funding agencies. May include Research Funding bodies, subcontractors.

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**TECHNICAL SKILLS AND KNOWLEDGE:**

Proficiency in the Microsoft suite of programmes; well-developed keyboard and word-processing skills.  
Highly proficient in a range of financial and accounting software and systems  
High degree of computer literacy and numerical data analysis skills - advanced Excel  
Experience with Finance One preferred

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**SPECIAL REQUIREMENTS:**

Contribute as part of a network of Financial Services Division staff, to provide suitable coverage during periods of leave and peak period activities.  
May be required to perform duties at different workplaces or locations across the campus

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**DIRECT BUDGET ACCOUNTABILITY:**

Nil

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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.

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**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.

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**CAPABILITY FRAMEWORK:**

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

## CAPABILITY FRAMEWORK DESCRIPTORS

### Associate Finance

#### ENGAGE

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>
INTERMEDIATE	INTERMEDIATE	INTERMEDIATE	INTERMEDIATE
<p>Focus on key points and speak using plain language</p> <p>Clearly explain and present ideas and arguments</p> <p>Display active listening and ask appropriate, respectful questions</p> <p>Write fluently and communicate routine technical information clearly avoiding unnecessary use of jargon</p>	<p>Support a culture of quality customer service in the organisation</p> <p>Demonstrate a thorough knowledge of the services provided and relay accurately to customers</p> <p>Identify and respond quickly to customer needs</p> <p>Consider customer service requirements and provide solutions to meet needs. Resolve complex customer issues and needs</p> <p>Co-operate across work areas to improve outcomes for customers</p>	<p>Build a supportive and co-operative team environment</p> <p>Share information and learning across teams. Support others in challenging work situations</p> <p>Acknowledge outcomes which were achieved by effective collaboration</p> <p>Engage other teams or work units to share information and solve issues and problems jointly</p>	<p>Utilise facts, knowledge and experience to support recommendations</p> <p>Work towards positive and mutually satisfactory outcomes</p> <p>Identify and resolve issues in discussion with other staff and stakeholders</p> <p>Identify others' concerns and expectations</p> <p>Keep discussion focused on the key issues</p>

#### ENABLE

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>
INTERMEDIATE	INTERMEDIATE	ADEPT	FOUNDATIONAL
<p>Complete work tasks to agreed budgets, timeframes and standards</p> <p>Take the initiative to progress and deliver own and team/work unit activities</p> <p>Contribute to allocation of responsibilities and resources to ensure achievement of team/work unit goals</p> <p>Seek and apply specialist advice when required</p>	<p>Understand the team/work unit objectives and align operational activities accordingly</p> <p>Initiate and develop goals and team plans and use feedback to inform future planning</p> <p>Respond proactively and with initiative to changing circumstances and adjust plans and schedules when necessary</p> <p>Ensure current work plans and activities are consistent with organisational change initiatives</p>	<p>Research and analyse information, identify interrelationships and make relevant evidence based recommendations</p> <p>Anticipate, identify and address issues and potential problems and select the most effective solutions from a range of options</p> <p>Participate in and contribute to team/work unit initiatives to resolve common issues or barriers to effectiveness</p> <p>Identify and share organisational process improvements to enhance effectiveness</p>	<p>Take responsibility for own actions</p> <p>Be aware of delegations and act within authority levels</p> <p>Be aware of team goals and their impact on own work tasks</p> <p>Escalate issues when these are identified</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>
INTERMEDIATE	INTERMEDIATE	INTERMEDIATE	INTERMEDIATE
<p>Be flexible and adaptable and respond quickly when situations change</p> <p>Offer own opinion and raise challenging issues in an appropriate manner</p> <p>Listen when ideas are challenged and respond in a reasonable way</p> <p>Work through challenges</p> <p>Stay calm and focused in the face of challenging situations</p>	<p>Represent the organisation in an honest, ethical and professional way and support a culture of integrity and professionalism</p> <p>Understand and follow legislation, rules, policies, guidelines and codes of conduct and help others to understand their obligations for compliance</p> <p>Recognise and report misconduct and inappropriate behaviour</p>	<p>Be willing to develop and apply new skills and adapt existing skills to new situations</p> <p>Show commitment to achieving work goals effectively</p> <p>Show awareness of own strengths and areas for growth and seek and respond positively to constructive feedback and guidance</p> <p>Demonstrate a motivated attitude to work activities and maintain own motivation when tasks become difficult</p>	<p>Be responsive to diverse experiences, perspectives, values and beliefs and listen to others' individual viewpoints</p> <p>Seek input from others who may have different perspectives and needs</p> <p>Adapt and respond positively in diverse environments</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>
FOUNDATIONAL	FOUNDATIONAL
<p>Use te reo Māori words and greetings in an appropriate way in the work place</p> <p>Endeavour to use and pronounce Māori words correctly</p> <p>Actively participate in training and development opportunities that increase own te reo Māori language capability</p>	<p>Understand the University's Māori Strategic Framework and its relevance for own work</p> <p>Demonstrate some awareness of Māori customs, values and beliefs</p> <p>Has some knowledge of Te Tiriti o Waitangi</p> <p>Actively participate in training and development opportunities that increase own understanding of tikanga Māori and knowledge of Te Tiriti o Waitangi</p>