

## JOB DESCRIPTION

# Manager Finance

<b>ROLE TITLE</b>	Manager Finance
<b>SECTION/DIVISION:</b>	Financial Services Division, Finance Advisory
<b>REPORTS TO:</b>	Manager Divisional Finance
<b>DIRECT REPORTS (FTE):</b>	Up to 3
<b>INDIRECT REPORTS (FTE):</b>	Nil
<b>PRIMARY PURPOSE OF THE ROLE:</b>	<p>Provide a range of financial advisory services such as financial modelling and analysis services to a client portfolio (normally part of a Division) including expert financial advice, analysis and day-to-day support to executives and managers that strengthens the business unit'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>Supervise Finance Associate(s) to achieve operational outcomes. Manage the day-to-day work activities of the team, including timelines, expected customer experience and prioritising and allocating workflow across the client portfolio.</p> <p>Implement, communicate and monitor clear service delivery standards and performance measures to achieve results and outcomes that support the client area activities, better manage and minimise risks, and form the basis for improvement planning. Regularly seek feedback from stakeholders to gauge satisfaction and service quality.</p> <p>Provide a range of financial advisory activities to a client portfolio such as accounting including month end accounting; financial reporting, analysis and commentary; financial forecasting and budgeting services including financial and accounting services for the project lifecycle of research grants; EFTS forecasting; financial modelling and analysis; and analysing and determining the underlying financial strength and key financial status and issues of the client portfolio and/or business units.</p> <p>Prepare an annual financial overview for the client portfolio including 5 year financial results with narrative, key financial challenges and opportunities for the next 5 years.</p> <p>Be the key financial point of contact for Head(s) of the portfolio or work area(s) and proactively partner with senior managers in the client portfolio to fully understand business needs. Anticipate and be responsive to the needs and issues of the client portfolio.</p> <p>Analyse and action complex requests in order to prioritise matters, and take action to facilitate or provide resolution and problem solving, referring where appropriate.</p> <p>Implement, communicate and monitor effective and robust financial management controls, systems and frameworks across the work areas 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>Develop, analyse and review a variety of 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 and expert technical interpretation on complex strategic and operational matters in a manner easily interpreted by stakeholders.

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

Work collaboratively with Ask Otago (the contact centre) and build and foster strong relationships with staff in Finance Services (Shared Services), to deliver an integrated and seamless suite of finance services

Seek new opportunities for enhancing the finance operational and advisory services provided to the client portfolio through collaboration with peer Managers Finance and other stakeholders (such as Finance Services, Shared Services), so as to maximise efficiency, leverage collective knowledge and ensure a consistent level of service.

Undertake a regular review of financial transactions within the client portfolio 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); and ensure reasonably practicable steps are taken to create a safe and healthy work environment.

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**KEY RELATIONSHIPS:**

Internal

Strong functional relationship with leader of the Client Portfolio(s) and associated staff who receive finance services.

Other managers across the University

Shared Services including Ask Otago, Finance Services and Operations Financial Services Division staff

External

Dependent upon the work area and the requirements of the Client Portfolio(s). May include other universities, DHBs, Research Funding bodies, Research Groups, Consultants, Customers/clients, Suppliers

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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.

5+ years' experience of relevant finance experience.

Proven experience in budget management, financial management, accounting and modelling, and implementation of financial management and accounting policy, systems, controls and reporting arrangements.

Preferred:

Proven experience in managing the delivery of high quality work outputs and team performance.

Knowledge of policies and procedures of various funding agencies Experience of working within the tertiary sector.

Experience with Finance One an advantage

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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

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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.

**DIRECT BUDGET  
ACCOUNTABILITY:**

Nil

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

## CAPABILITY FRAMEWORK DESCRIPTORS

### Manager 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>
ADEPT	ADEPT	INTERMEDIATE	INTERMEDIATE
<p>Tailor communication to the audience</p> <p>Clearly explain complex concepts and arguments to individuals and groups</p> <p>Actively listen to others and clarify own understanding. Create opportunities for others to be heard</p> <p>Write fluently in a range of styles and formats. Prepare written material that is well structured and easy to follow by the intended audience</p>	<p>Take responsibility for delivering high quality customer-focused services</p> <p>Understand customer perspectives and ensure responsiveness to their needs</p> <p>Identify customer service needs and implement solutions</p> <p>Find opportunities to connect and co-operate with internal and external parties to improve outcomes for customers</p> <p>Maintain good relationships with key customers in area of expertise</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>
ADEPT	INTERMEDIATE	ADEPT	INTERMEDIATE
<p>Take responsibility for delivering on intended outcomes. Use own expertise and seek others' expertise to achieve work outcomes</p> <p>Ensure team/work unit staff understand expected goals and acknowledge success</p> <p>Identify resource needs and ensure goals are achieved within budget and deadlines</p> <p>Identify changed priorities and ensure allocation of resources meets new organisational needs.</p> <p>Ensure financial implications of changed priorities are explicit and budgeted</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 and be accountable for the outcomes of others</p> <p>Understand delegations and act within authority levels</p> <p>Be alert to risks that might impact the completion of an activity and escalate these when identified</p> <p>Use financial and other resources responsibly</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>
ADEPT	ADEPT	ADEPT	INTERMEDIATE
<p>Be flexible, show initiative and respond quickly when situations change</p> <p>Give constructive and honest feedback and advice using appropriate manner and tone</p> <p>Listen when ideas are challenged, seek to understand the nature of the challenge and respond constructively</p> <p>Raise and work through challenging issues and seek alternatives</p> <p>Keep control of own emotions and stay calm under pressure and in challenging situations</p>	<p>Represent the organisation in an honest, ethical and professional way and support a culture of integrity and professionalism within the team/work unit</p> <p>Set an example for others to follow and identify and explain ethical issues pertaining to work activity. Ensure others clearly understand the legislation and policy framework within which they operate</p> <p>Act to prevent and report misconduct and inappropriate behaviour</p>	<p>Look for and take advantage of opportunities to learn new skills and develop strengths</p> <p>Show commitment to achieving challenging goals</p> <p>Examine and reflect on own performance and areas for improvement. Encourage feedback from colleagues and stakeholders</p> <p>Demonstrate a high level of personal motivation 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>



## 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>
INTERMEDIATE	FOUNDATIONAL	INTERMEDIATE	INTERMEDIATE
<p>Ensure that roles and responsibilities are clearly communicated</p> <p>Develop team capability and recognise and develop potential in people</p> <p>Be constructive and build on strengths when giving feedback</p> <p>Identify and act on opportunities to provide coaching and mentoring</p> <p>Recognise performance issues that need to be addressed and work towards resolution of issues</p>	<p>Assist team to understand organisational direction</p> <p>Ensure team members understand the work unit's strategy, policies and services and how their activities align to objectives and affect overall performance</p> <p>Understand and clearly communicate performance standards</p> <p>Recognise and acknowledge team members' high quality work</p>	<p>Develop team/work unit plans that take into account team capability and strengths</p> <p>Plan and monitor resource allocation effectively to achieve team/work unit objectives</p> <p>Ensure team members work with a good understanding of work principles as they apply to the work area</p> <p>Participate in wider work unit workforce planning to ensure the availability of capable resources</p>	<p>Promote change processes and communicate change initiatives across the team/unit</p> <p>Accommodate changing priorities and respond flexibly to uncertainty and ambiguity</p> <p>Support others in managing uncertainty and change</p>

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	INTERMEDIATE
<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 incorporate its principles appropriately in work place activities</p> <p>Demonstrate an appropriate workplace understanding and awareness of tikanga Māori</p> <p>Has knowledge of the Articles and Principles of Te Tiriti o Waitangi</p> <p>Take part in opportunities to extend own understanding and awareness of tikanga Māori and Te Tiriti o Waitangi</p>