JOB DESCRIPTION
Team Leader - Financial Planning
Vacancy Ref: A2992

<table>
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<th>Job Title: Team Leader - Financial Planning</th>
<th>Present Grade: 7P</th>
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<td>Department/College: Finance Division</td>
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**Directly responsible to:** Deputy Director of Finance (Financial Planning & Analysis)

**Supervisory responsibility for:** a team of allocated Finance professionals, administrators and assistants

**Other contacts**

**Internal:** All Finance Division staff, particularly the Strategic Faculty Partners, Faculty Finance Partners, other senior staff and, as required for allocated areas, Deans, Associate Deans, Heads of Departments, Research Institute Directors, Chief Administrative Officer and Secretary, Professional Services Directors, Faculty Offices, Policy and Resources Committees, Dean’s Group, Professional Services Leadership Team.

**External:** Internal and External Auditors, Regulators, Funders, Donors, Accreditation bodies, others as required.

**Key responsibilities**

**Leadership and day-to-day management of Budget Support Operations team:**

Lead, organise and manage an effective and motivated team, providing support and guidance to ensure that staff work to the highest professional standards and deliver a comprehensive and robust financial management service to budget holders across the University underpinned by excellent customer service.

In consultation with others, establish and monitor the allocation of duties and budget areas to staff in the team, with appropriate options for cover and resilience.

Bring professional experience to bear on constructively challenging the current processes and practices, using best practice from inside and outside the sector.

Identify and deliver opportunities for operational process and systems improvement, working with key colleagues such as the Systems and Data Manager and ensuring appropriate consultation, testing and evaluation of changes proposed.

Seek feedback on operations of the wider team, through personal engagement with budget holders or other stakeholders across the University and identify issues for further review and development.

Ensure delivery of all key operational requirements in support of the University’s planning, budgeting, reporting and monitoring processes as well as its annual statutory and regulatory reporting timetable.

Promote a culture of continuing professional development and learning for self and team within the framework of the University’s Performance Development Review processes. Actively support career development opportunity identification and delivery across the wider team.

**Financial Control and Financial Management operations for allocated areas**

Provision of expert technical financial support, guidance and management information to allocated budget holders, consistent with the University’s overall approach. This will include providing support for the annual Planning and
Resource allocation process (and as required on an ad hoc basis) for allocated areas including preparation of materials, evaluation of proposals against key criteria, providing appropriate challenge in assisting prioritisation of decisions in the context of wider University strategic goals.

Promoting techniques such as zero-based budgeting and principles such as full economic costing to support stakeholders in key decision making.

Ensure that historic financial performance and trends, future projections and ongoing sustainability in light of the wider University strategic priorities and emerging financial risks are identified and understood by budget-holders.

Provide sound judgement in considering issues arising, seeking advice where necessary.

**Wider role and university activities**

Develop professional networks within the institution more widely and externally within Higher Education.

As a key member of the Finance Division, seek advice from colleagues as required, effectively communicate matters relating to financial planning and operations, exchange ideas and best practice, develop excellent relationships across areas and contribute positively in all aspects of the Division’s work.

Assist with other projects commensurate with the grade of the post including as part of University wide multi-disciplinary teams working with senior managers to help develop areas of University strategy and policy.

Promote and uphold the values of the University at all times.