## Position Description

**Title:** Finance Manager – Research Reporting  
**HEW Level:** HEW 9  
**Faculty/Office:** Finance  
**Department/Team:** Financial Control and Treasury  
**Position Number:**  
**Date:** March 2019

**Position Purpose:** Support the Director – Financial Control and Treasury in the management of research financial reporting and governance.

### ORGANISATIONAL CONTEXT

The Finance division provides a broad range of Financial Services to support the University's mission of teaching and research. Within the Finance division, the Financial Control and Treasury department drives strong financial governance over the University's financial results, provides external reporting to government and grant funding bodies, manages cash liquidity, debt and investment needs, ensures adherence to external Accounting Standards, performs complex financial asset valuations, manages the University Fixed Asset register, and supports the academic community in managing projects through their financial life-cycle and reporting on external research grants.

The Finance Manager – Research Reporting oversees the preparation and submission of the major annual research financial returns (ARC, NHMRC, HERDC, ERA), as well as finance progress reports on individual research grants over the life of each grant.

The role oversees the financial governance of the project ledger, which houses grant and other operational project accounts. The role manages a team of four direct reports, who undertake the life-cycle processes of project set-up, monitoring, external reporting, invoicing and quality reviews.

This role will partner with senior stakeholders to overhaul and streamline processes, develop and monitor workloads, and establish and deliver against agreed KPIs.

This role develops strong, credible relationships with senior stakeholders across the organization, including the Director - Research Office, Faculty Research, Managers, Finance Managers, General Managers, Heads of Departments, senior academics and Institute Directors.

### ORGANISATION CHART

- **Director Financial Control and Treasury**
  - Finance Manager - Controlled Entities  
    - Team
  - Finance Manager - Research Reporting  
    - Team
  - Finance Manager - Research Reporting
  - Financial Reporting Accountant
  - Financial Reporting Officer x3
  - Head of Tax & Treasury
  - Team
  - Senior Finance Manager - Financial Controls & Compliance Manager
    - Team
**KEY ACCOUNTABILITIES**

Support the Director – Financial Control and Treasury with:

- Managing the core processes of project ledger maintenance, including project set-up, invoice processing, non-lead partner communication and year-end project reviews and roll-forward processes. These processes are high-volume and yet also require application of judgement and a constant focus on accuracy.

- Managing the creation and review of accurate and timely internal and external grant funding reporting requirements, including individual grant acquittals and annual submissions to Higher Education Research Data Collection (HERDC), Australian Research Council (ARC) National Health & Medical Council (NHMRC) Excellence in Research for Australia (ERA) and other funding bodies.

- Completing an overhaul of the above two areas of work, as part of OFS delivery against the University strategic initiative to overhaul back-office support to the academic community

- Establish a new model of stakeholder engagement with key research project stakeholders, including Director of Research Office, senior academics, Faculty Research Managers, Faculty General Managers, and Directors of Research Institutes and Centre of Excellence. Establish customer KPI and satisfaction metrics, initiate regular customer research project review meetings and drive a new approach to customer interaction in the area of research grant financial support.

- Review and approval of grant-related month-end journals as required

- Provision of advice to Offices and Faculties on application of financial policies and pro-active identification of anomalies in Project Ledger /Chart.

- Design and review of assigned material for the University and Group financial statements, including grant acquittals.

- Manage and develop a team of four direct reports in delivery of the above accountabilities. Overhaul workload models used within the team.

- Comply with relevant EEO and WHS regulations. Perform any other duties as required and as appropriate for the HEW grade of this role.

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**POSITION CONTEXT**

<table>
<thead>
<tr>
<th>Reports to:</th>
<th>Director – Financial Control and Treasury</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positions Reporting to:</td>
<td>Direct: 4</td>
</tr>
<tr>
<td>Indirect: nil</td>
<td></td>
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<tr>
<td>Key Direct Clients:</td>
<td>University Finance Managers and General Managers and Research Managers (HEW 9+10).</td>
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<tr>
<td></td>
<td>Director Research Office (HEW 10)</td>
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<td></td>
<td>Directors of Research Institutes and Centre of Excellence (HEW 10)</td>
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<tr>
<td>Other Key Relationships:</td>
<td>Other OFS Directors (HEW 10).</td>
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<td></td>
<td>Other staff members in own office or department</td>
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<td></td>
<td>Immediate team members</td>
</tr>
<tr>
<td>Budget Accountability</td>
<td>Nil</td>
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<tr>
<td>Role-specific Conditions:</td>
<td>Criminal check</td>
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<tr>
<td>Scope and autonomy</td>
<td>Identifies Group wide current and emerging issues and develops appropriate policies, strategies and/or programs.</td>
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<tr>
<td>Problem solving</td>
<td>Manages significant organisational problems and/or issues and undertakes complex strategic planning and decision making.</td>
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</table>
## CAPABILITY FRAMEWORK

Capability Frameworks describe the behaviours, skills, attributes and experience required to successfully perform a position or group of similar positions.

<table>
<thead>
<tr>
<th>COMPETENCIES</th>
<th>ATTRIBUTES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Influencing and Persuading</strong>: Building commitment by convincing others and winning them over to a particular point of view.</td>
<td><strong>Perseverance</strong>: Persevering despite obstacles to ensure tasks are completed.</td>
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<td><strong>Relationship Management</strong>: Establishing effective working relationships with others.</td>
<td><strong>Flexibility</strong>: Responding effectively to unexpected or changing circumstances.</td>
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<td><strong>Implementing Systems</strong>: Adopting a systematic and organised approach, and developing and utilising guidelines and procedures.</td>
<td><strong>Initiative</strong>: Taking action, on own accord, to address problems and prevent them from reoccurring.</td>
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<td><strong>Setting Expectations</strong>: Stating clearly what is expected from others, clearly expressing ideas, and maintaining a precise and constant flow of information.</td>
<td><strong>Reliability</strong>: Meeting commitments and responsibilities.</td>
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<tr>
<td><strong>Delegating</strong>: Enlisting the talents of others to help meet objectives by giving them important activities and sufficient autonomy to exercise their own judgement.</td>
<td><strong>Interpersonal Impact</strong>: Making a positive impression on others in a range of interpersonal contexts.</td>
</tr>
<tr>
<td><strong>Tracking Performance</strong>: Taking nothing for granted and persistently monitoring the progress of activities to ensure they are completed on time.</td>
<td><strong>Resilience</strong>: Dealing effectively with and recovering quickly from setbacks or pressure.</td>
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<tr>
<td><strong>Giving Feedback</strong>: Letting others know in a respectful, supportive and straightforward manner what is expected of them, how they have performed and if they have met needs and expectations.</td>
<td><strong>Accountability</strong>: Assuming responsibility for making decisions and delivering agreed outcomes.</td>
</tr>
<tr>
<td><strong>Leading and Directing</strong>: Taking the lead and exercising influence when managing complex situations and/or making critical business decisions.</td>
<td><strong>Integrity</strong>: Maintaining confidentiality, discretion and professionalism.</td>
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<td><strong>Delivering Outcomes</strong>: Holding self and others accountable for achieving high quality and solution focused outcomes.</td>
<td><strong>Quality Focus</strong>: Ensuring accuracy and quality when completing tasks.</td>
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<td><strong>Planning and Execution</strong>: Managing time and resources to complete tasks and achieve objectives.</td>
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<td><strong>Developing Capability</strong>: Coaching, mentoring and supporting others to develop their competence and confidence for performance and growth</td>
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**REQUIRED KNOWLEDGE**
Qualifications, technical and/or professional skills and information needed from day one for successful performance.

- Bachelor in Accounting/Finance or equivalent relevance
- CA/CPA qualified accountant
- Minimum five years of relevant post-qualification managerial experience.
- High level of verbal and written communication skills
- Advanced excel skills and report creation via cubing technology.

**ACQUIRED KNOWLEDGE**
Organisational and/or professional skills and information to be developed within the first 3 to 6 months in the role for successful performance.

- Knowledge of specific accounting treatments applicable to the University. Knowledge of Finance functions, structure, policies, systems, processes and procedures.
- Knowledge of University policies, systems, processes.
- Knowledge of how the University works and how relevant functions across the University interrelate.
- Understanding of government funding of Universities.

**KEY EXPERIENCES**
Practical experiences and exposure to specific environments or activities related to successful performance.

- Significant team management experience, including workload planning and monitoring and team development.
- Strong experience in driving significant improvements in customer experience and customer-focused cultural change.
- Significant experience of managing high-volume financial activities that require both judgement and high levels of accuracy.
- Significant experience on overhauling processes, re-designing activities, thinking outside the box and engaging with partners to make step-changes in the way core operational activities are performed.
- Significant experience of understanding customer needs, forging credible relationships with senior stakeholders, and delivering on customer KPIs.
- Experience in a similar role within a large, complex organisation with complex accounting and reporting requirements.
- Proactive, inquisitive nature, with experience of investigating existing practices and processes and providing both process and technical advice to ensure business processes are in compliance with mandatory reporting and accounting policies.
- Ability to develop and drive adherence to policies and procedures.
- Extensive use of large computerised financial systems (Finance One system knowledge helpful but not essential).