



Job title	Finance Manager: Gifts and endowments	Job family and level	Administrative, Professional and Managerial Level 4
School/ Department	Financial Management Department	Location	Kings Meadow Campus/ Hybrid Working

Purpose of role

- Provide effective and efficient operational financial management services and business-partnering support to Campaign and Alumni Relations Office (CARO).
- Provide leadership for one direct report
- Provide effective fund management for philanthropic income raised by the University, ensure provision of robust and consistent financial advice and influence significant business decisions.
- Work closely with the CARO directors to implement specific plans and agendas including University and business unit KPIs.
- Work closely with the Corporate Finance Team to ensure compliance with financial regulations, external reporting and requirements for financial planning, budgeting, management accounting, forecasting and other financial reporting.
- Ensure that CARO's objectives are being met and budget management support is provided at an appropriate level to support CARO's business decisions.

	Main responsibilities (Primary accountabilities and responsibilities expected to fulfil the role)	% time per year
1	<p>Philanthropic Fund Management</p> <ul style="list-style-type: none"> ▪ Ensure the University's philanthropic income is properly and accurately managed in accordance with SORP, financial regulations, University policy and best practice. ▪ Oversee effective donation management including gifts processing, acknowledging, and disbursement at the University. Devise and maintain a system of robust internal controls and ensure best financial practice through compliance with legal and statutory requirements. ▪ Provide specialist financial and technical advice on all UK and ▪ Overseas charitable donations to the University, including endowments, legacies, gift aids, gift of shares and other charitable giving types and programs. ▪ Lead legacy administration services at the University and liaise with internal and external parties on all legacy gifts. ▪ Ensure appropriate Gift Agreements are in place in accordance with the University's Gift Acceptance Policy and Code of Ethical Fundraising Practice. ▪ Work closely with other finance colleagues at the University and provide expert guidance on philanthropic donations and 	30 %

	<p>endowments.</p> <ul style="list-style-type: none"> ▪ Actively manage and develop effective working relationships with external partners, other HE institutions and regulators where appropriate to share best practice and facilitate future exchange of information in gift accounting and fundraising. 	
2	<p>Financial planning, management accounting, monitoring and control</p> <ul style="list-style-type: none"> ▪ Lead CARO financial planning and management processes within the University's framework. Model and evaluate financial scenarios for CARO business proposals. ▪ Ensure management accounts and forecasts are prepared in line with the University's processes and standards. ▪ Evaluate budget position and provide recommendations based on business requirements. Contribute to development and implementation of strategic plans for CARO. ▪ Provide financial briefings, training and support to CARO directors and budget holders to ensure high quality provision. ▪ Manage and mitigate financial risks associated with donations and endowments. ▪ Advice and support CARO and other fundraising staff in their role ensuring legal and statutory regulations are understood and followed. 	25%
3	<p>Financial Reporting and Performance Monitoring</p> <ul style="list-style-type: none"> ▪ Develop and provide financial reports and recommendations on the University fundraising performance to senior management team and executive management boards and committees. ▪ Analyse and identify trends and gaps in the University's fundraising activities and their financial implications in support of decision making. ▪ Responsible for the University's annual Ross CASE Survey submission and post survey results analytics. Make recommendations on performance improvement. ▪ Develop and report on financial KPIs for philanthropic income at the University. ▪ Work closely with other senior colleagues at CARO and the University to provide expert guidance to inform CARO fundraising and supporter engagement objectives. ▪ Manage and support CARO's new projects and working groups as they arise. 	20%
4	<p>Change Management</p> <ul style="list-style-type: none"> ▪ Ensure best practice and adherence to University policy in all financial processes, constantly improving standards in accordance with the University's responsibility to its supporters. ▪ Recommend policy and develop financial procedures to improve CARO's financial control and assurances. ▪ Lead the ongoing process of improvement by identifying any shortfalls in current financial procedures and implement improvements. ▪ Inform and influence CARO policy formulation and contribute to decisions on financial elements of major business development issues. ▪ Keep up to date with accounting, regulatory and University developments to ensure compliance. 	10%

5	<p>Staff leadership and development</p> <ul style="list-style-type: none"> ▪ Ensure that the finance team achieve high work standards and outputs and add value to the University. ▪ Lead and motivate the team (1 direct report) including improving the capability of staff. ▪ Provide development opportunities, coaching and professional support. ▪ Organise own and Finance Team work/priorities ensuring these fit into the wider organisational and departmental plans. ▪ Collaborate and support other colleagues outside the team who are responsible for some aspects of financial management. 	10%
6	<p>Other responsibilities</p> <ul style="list-style-type: none"> ▪ As may reasonably be required 	5%

Person specification

	Essential	Desirable
Skills	<ul style="list-style-type: none"> ▪ Proven planning and ▪ Organisational skills for self and others ▪ Influencing skills with senior managers ▪ Excellent interpersonal skills and ability to negotiate and communicate effectively at both senior and junior levels ▪ Advanced analytical and problem-solving capability ▪ Excellent business writing skills ▪ Highly proficient IT skills with Office, financial and other business systems ▪ Ability to define priorities and work flexibly and effectively under pressure to meet demanding and sometimes conflicting deadlines 	<ul style="list-style-type: none"> ▪ Presentation/workshop facilitation skills. ▪ Change management skills
Knowledge and experience	<ul style="list-style-type: none"> ▪ Substantial experience working in the charity, or HE sector. ▪ Application of financial/business processes and controls ▪ Operation of devolved financial management ▪ Application of project and long-term contract accounting and reporting ▪ A track record of credible engagement with senior management ▪ Up-to-date knowledge of technical accounting developments and practice ▪ Understanding of UK higher education funding environment and opportunities ▪ Detailed knowledge of funding partners' financial systems and processes where appropriate ▪ In-depth knowledge of the principles of financial management, theory and best practice ▪ Understanding of charitable giving, including knowledge of tax efficient giving ▪ Line management experience 	<ul style="list-style-type: none"> ▪ Knowledge of higher education sectors, university structures and procedures ▪ Working knowledge of Raiser's Edge software packages. ▪ Experience of leading and motivating a professional team ▪ Business case preparation and options assessment ▪ Specific experience relevant to the business unit ▪ Well-developed knowledge and understanding of systems/services and their dependencies across organisational functions
Qualifications, certification and training (relevant to role)	<ul style="list-style-type: none"> ▪ CCAB qualified or significant experience in a similar or relevant to role 	



As part of this, we welcome a diverse population to join our work force and therefore encourage applicants from all communities, particularly those whose protected characteristics under the Equality Act 2010, are not well-represented in our current staff body.

Expectations and behaviours

The University has developed a clear set of core expectations and behaviours that our people should be demonstrating in their work, and as ambassadors of the University's strategy, vision and values. The following are essential to the role:

- Valuing people** Is friendly, engaging and receptive, putting others at ease. Actively listens to others and goes out of way to ensure people feel valued, developed and supported.
- Taking ownership** Is clear on what needs to be done encouraging others to take ownership. Takes action when required, being mindful of important aspects such as Health & Safety, Equality, Diversity & Inclusion, and other considerations.
- Forward thinking** Drives the development, sharing and implementation of new ideas and improvements to support strategic objectives. Engages others in the improvement process.
- Professional pride** Is professional in approach and style, setting an example to others; strives to demonstrate excellence through development of self, others and effective working practices.
- Always inclusive** Builds effective working relationships, recognising and including the contribution of others; promotes inclusion and inclusive practices within own work area.

Key relationships with others



