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| Last updated: | 6th November 2020 |

**JOB DESCRIPTION**

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| Post title: | **Head of Planning & Performance** | | |
| Academic Unit/Service: | Finance, Planning & Analytics | | |
| Faculty: | Professional Services | | |
| Career Pathway: | Management, Specialist and Administrative (MSA) | Level: | 6 |
| \*ERE category: | n/a | | |
| Posts responsible to: | Director of Finance – Planning & Analytics | | |
| Posts responsible for: | 1x L5, 6 x L4, 2 x L3 | | |
| Post base: | Office-based | | |

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| Job purpose |
| This role brings together leadership of the University’s Strategic Planning and Data, Analytics and Insights teams, as such it plays a key role in strategy delivery.  **Planning:**  To lead and develop the Strategic Planning team to deliver the University strategy, by enabling and driving the University strategic planning cycle.  **Performance:**  To provide leadership, and management support, moving forward the long-term strategic development of a Data, Analytics and Insight function at the University of Southampton, which serves as the central source for reporting institutional information to internal and external agencies aligned to the University’s strategies. |

| Key accountabilities/primary responsibilities | | % Time |
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|  | **Staff management**   * To lead and develop the planning & performance area, ensuring the two teams within it have the capability and skills to respond to rapid change and complexities to meet the needs of the University now and in the future. * To effectively manage budgets and resources | 10% |
|  | **Student number planning**   * To lead student number planning process across the institution, working with key stakeholders to ensure plans meet the changing needs of the University. | 20% |
|  | **Strategic Planning**   * To lead the University’s annual business planning process and to develop frameworks to translate the University’s vision into actionable strategies. * To develop, implement and maintain a fit for purpose, robust, focused approach to business planning to allow for improved decision making at the University, faculty and professional services levels – benchmarking against best practise across the sector. * Working with senior leaders within the University - to set direction for faculties and professional services on development and implementation of new planning systems and approaches to ensure continuing success. * To provide expert support and advice to faculty and professionals services management committees during the business planning process. | 20% |
|  | **Data, analytics & insight**   * To lead and manage a Data, Analytics and Insights (DAI) team, covering the functions of market intelligence, student experience management information and competitor analysis. Working across the faculties and professional services to ascertain their DAI needs and prioritising in line with the University strategy. * To provide and present data, information and interpretation to senior management groups and committees to facilitate decision making, for example in relation to; student recruitment, university policy, university reputation, the student experience – in furtherance of the institution being recognised as a successful and highly influential international university. | 30 % |
|  | **Data integrity**   * To play a key leadership role in driving improvements to the integrity, quality, accuracy, validity and impact of institutional data and information in terms of collection, analysis and reporting. | 10% |
|  | **Executive level committee support**   * To support the University’s Planning & Resource Group, including attendance at meetings and monitoring of action delivery. | 5 % |
|  | Any other duties as appropriate | 5 % |

| Internal and external relationships |
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| Post holder will need to work closely with the University’s Executive, as well as colleagues across professional services and faculties.  Post holder will be expected to liaise with peers in other, similar HEIs through membership of bodies such as HESPA (higher education strategic planners association). |

**PERSON SPECIFICATION**

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| Criteria | Essential | Desirable | How to be assessed |
| Qualifications, knowledge and experience | Skill level equivalent to achievement of a professional qualification or postgraduate degree.  Significant experience of strategic planning in a commercial or education sector.  Proven experience of managing significant change.  Proven strategic management skills in a specialist field. | Postgraduate qualification or equivalent professional experience in relevant discipline.  Knowledge of Higher Education sector data sources e.g. HESA & OfS  Knowledge of Lean / Six Sigma process efficiency tools |  |
| Planning and organising | Significant experience in planning and delivering major projects and workloads, often to very tight deadlines  Able to organise major new initiatives, with little or no precedent.  Ability to take a strategic view in a fast-moving and dynamic environment. |  |  |
| Problem solving and initiative | Able to develop significant new concepts and original ideas within one’s field in response to intractable issues of importance to the University. |  |  |
| Management and teamwork | Able to proactively develop team dynamics and performance, ensuring quality standards are consistently achieved.  Able to foster positive relationships both within and outside of own department.  Able to manage team dynamics, ensuring any potential for conflict is managed effectively.  Able to proactively work with senior managers across the University to achieve key deliverables. |  |  |
| Communicating and influencing | Able to negotiate effectively on behalf of the department or University on key issues.  Able to communicate with colleagues at all levels.  Able to resolve tensions and difficulties as they arise. |  |  |
| Other skills and behaviours | High levels of initiative  Persistent and resilient  Able to apply and actively promote equality, diversity and inclusion principles to the responsibilities of the role.  Demonstrate the Southampton Behaviours and work with colleagues to embed them as a way of working within the team. See Appendix 1 |  |  |
| Special requirements | Excellent understanding of organisational planning systems, and to be able to apply these to a University context |  |  |

**JOB HAZARD ANALYSIS**

**Is this an office-based post?**

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| Yes | If this post is an office-based job with routine office hazards (eg: use of VDU), no further information needs to be supplied. Do not complete the section below. |
| No | If this post is not office-based or has some hazards other than routine office (eg: more than use of VDU) please complete the analysis below.  Hiring managers are asked to complete this section as accurately as possible to ensure the safety of the post-holder. |

## - HR will send a full PEHQ to all applicants for this position. Please note, if full health clearance is required for a role, this will apply to all individuals, including existing members of staff.

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| **ENVIRONMENTAL EXPOSURES** | **Occasionally**  (<30% of time) | **Frequently**  (30-60% of time) | **Constantly**  (> 60% of time) |
| Outside work |  |  |  |
| Extremes of temperature (eg: fridge/ furnace) |  |  |  |
| ## Potential for exposure to body fluids |  |  |  |
| ## Noise (greater than 80 dba - 8 hrs twa) |  |  |  |
| ## Exposure to hazardous substances (eg: solvents, liquids, dust, fumes, biohazards). Specify below: |  |  |  |
| Frequent hand washing |  |  |  |
| Ionising radiation |  |  |  |
| **EQUIPMENT/TOOLS/MACHINES USED** | | | |
| ## Food handling |  |  |  |
| ## Driving university vehicles(eg: car/van/LGV/PCV) |  |  |  |
| ## Use of latex gloves (prohibited unless specific clinical necessity) |  |  |  |
| ## Vibrating tools (eg: strimmers, hammer drill, lawnmowers) |  |  |  |
| **PHYSICAL ABILITIES** | | | |
| Load manual handling |  |  |  |
| Repetitive crouching/kneeling/stooping |  |  |  |
| Repetitive pulling/pushing |  |  |  |
| Repetitive lifting |  |  |  |
| Standing for prolonged periods |  |  |  |
| Repetitive climbing (ie: steps, stools, ladders, stairs) |  |  |  |
| Fine motor grips (eg: pipetting) |  |  |  |
| Gross motor grips |  |  |  |
| Repetitive reaching below shoulder height |  |  |  |
| Repetitive reaching at shoulder height |  |  |  |
| Repetitive reaching above shoulder height |  |  |  |
| **PSYCHOSOCIAL ISSUES** | | | |
| Face to face contact with public |  |  |  |
| Lone working |  |  |  |
| ## Shift work/night work/on call duties |  |  |  |

Appendix 1

Collegiality represents one of the four core principles of the University; Collegiality, Quality, Internationalisation and Sustainability. Our Southampton Behaviours set out our expectations of all staff across the University to support the achievement of our strategy.

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| **All staff** | **Behaviour** |
| **Personal Leadership** | I take personal responsibility for my own actions and an active approach towards my development |
| I reflect on my own behaviour, actively seek feedback and adapt my behaviour accordingly |
| I show pride, passion and enthusiasm for our University community |
| I demonstrate respect and build trust with an open and honest approach |
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| **Working Together** | I work collaboratively and build productive relationships across our University and beyond |
| I actively listen to others and communicate clearly and appropriately with everyone |
| I take an inclusive approach, value the differences that people bring and encourage others to contribute and flourish |
| I proactively work through challenge and conflict, considering others’ views to achieve positive and productive outcomes |
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| **Developing Others** | I help to create an environment that engages and motivates others |
| I take time to support and enable people to be the best they can |
| I recognise and value others’ achievements, give praise and celebrate their success |
| I deliver balanced feedback to enable others to improve their contribution |
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| **Delivering Quality** | I identify opportunities and take action to be simply better |
| I plan and prioritise efficiently and effectively, taking account of people, processes and resources |
| I am accountable, for tackling issues, making difficult decisions and seeing them through to conclusion |
| I encourage creativity and innovation to deliver workable solutions |
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| **Driving Sustainability** | I consider the impact on people before taking decisions or actions that may affect them |
| I embrace, enable and embed change effectively |
| I regularly take account of external and internal factors, assessing the need to change and gaining support to move forward |
| I take time to understand our University vision and direction and communicate this to others |