

APPENDIX ONE:
Job Description

POSITION TITLE:	Senior Project Manager
LOCATION:	Head Office, Tauranga
PEOPLE LEADER:	Property Manager

At Craigs (CIP) we are focused on helping our clients to achieve their financial goals and grow their wealth. We believe that where a client's financial future is concerned, our people are fundamental to achieving this. Our collective skills, knowledge and commitment means that we can provide the best possible outcomes for our clients.

The Senior Project Manager role is located within the CIP Property Team based in Tauranga. This team is responsible for new builds, site searches, fitouts, reconfigurations, lease management, site reviews and operational day-to-day property requirements nationally. The role's primary focus is:

- Supporting and leading project and operational delivery nationally across our property portfolio to align with our Strategic Plan.
- Managing project scope (including design), timelines, plan/reporting, resources, risk registers, execute, and monitor new builds, refurbishments and upgrades and exiting existing sites within approved budgets.
- Assisting/responsible for procurement, tender evaluations, contract, and lease negotiations.
- Effectively managing stakeholders, working with General Managers, branch teams, IT, Marketing and People and Performance to drive a collaborative approach and successfully deliver project requirements.
- Monitoring and providing progress reports to the Property Manager, Head of Advisory and General Managers. Maintain and complete financial tracking to budget and ensure alignment with WIP and completion of fixed asset register.
- Working with our strategic partners the incumbent must establish and strengthen good relationships (construction, architects, furniture, audio visual, security etc).

The role will be key in executing our property targets across the organisation which enable CIP to achieve its alignment to our Strategic Plan.

WHAT I DO

PROJECT MANAGEMENT AND DELIVERY

- Lead new build projects from the creation of board paper, obtain board approval initiation/concept to operational handover, manage make good and shut down of existing sites.
- Engage with Strategic Partners (construction, lease, insurers) to drive successful project co-ordination and delivery, including exiting.
- Design, plan, scope, and schedule activities required to engage all parties for new builds and reconfigurations.

- Hold accountability for the completion of project to time, scope, and within Board approved budget. Responsible for tracking project spend and maintaining delivery alignment with plan and budgets.
- Use project management methodologies which are fit for purpose.
- Responsible for identifying and escalating risks and issues to the Property and General Managers and other parties as required
- Ensure new Heads Of Agreement, Agreement To Lease and Deed Of Lease are created and signed off. Additionally lease renewal support where required.

VENDOR / STAKEHOLDER MANAGEMENT

- Build strong rapport with stakeholders, influencing key decisions and driving cross department cooperation.
- Managing and engaging with stakeholders/external vendors on a regular basis, ensuring sufficient input is provided by all relevant parties and all requirements/deliveries are well understood and executed within a timely manner.

OTHER RESPONSIBILITIES

- Ensure the identification of operational efficiencies, driving new initiatives to enable better process flows, efficiencies and cost savings.
- Deliver to our Physical Site Security Policy initiating the scope by upgrading sites for alarm monitoring and other required functions, test and commissioning. In conjunction with the Property Manager and budget identify priority upgrades for site specific security including introduction to new builds or refurbished sites.
- WIP and Fixed Asset review and updates for all projects and any associated paperwork for suppliers, insurers, regulatory and legal compliance.
- Within the BCP role you have the following responsibilities oversight and input into the business continuity operations, including reporting and day-to-day activities. Along with the other Crisis Managers you will either manage or support the programmatic expectations that guide business unit leaders with specific events.
- Key alternate 24/7 contact for Alarms nationwide – answering and responding to occasional after-hours calls.
- Assist with operational day-to-day property requirements as required by the Property Manager.

GENERAL DUTIES AND RESPONSIBILITIES

- Operate within the parameters of the NZX rules and regulations, relevant legislation and CIP procedures and policies.
- Maintain a high level of competence with Craigs Investment Partners' systems.
- Follow company policy and process to ensure client information is protected against loss, unauthorised access, use, modification of disclosure.
- Maintain the core competencies as set down by the Company from time to time.
- Complete all Company educational requirements as required for the role as set by the Company.
- At all times follow Company prescribed administrative processes and policies, including use of supporting systems.
- Act professionally, ethically and work co-operatively and constructively within the framework of the Company structure.
- At all times act with integrity and treat clients fairly and respectfully.
- Any other tasks as requested by your manager.

WHAT I VALUE

Our Values



**We are
stronger
together**



**We
strive for
excellence**



**We put
people
first**



**We do
what's
right**

At Craigs, we pride ourselves on creating an environment where our people feel they belong and can bring their best self to work and feel valued. We grow as a team and with our clients and are always looking to support our communities – both internal and external. Our values build the foundation of how we work and how we provide great outcomes for our people and clients.

WHAT I BRING

Qualifications	• Relevant tertiary qualification in Business, Administration, or related field (desirable) • Project Management certification/qualification (preferred)
Knowledge/Experience	• 10+ years of experience in project management roles • Project Manager experience running successful end-to-end property projects, including using project management toolsets (essential) • Programme Management (desirable) • Financial services industry experience (desirable)
Key Skills and Attributes	• A proven ability to successfully plan, prioritise, and deliver a program of works. • Highly competent in managing project budgets, resources, dependency, vendors, strategic partners, including scope, and conflict management • Budget modelling and cost reporting/management • Highly motivated, collaborative, resilient individual capable of working in a dynamic environment • Ability to establish and maintain strong relationships with a diverse range of internal and external stakeholders • Pro-active and delivery focussed with excellent influencing abilities and listening and communication skills – both written and verbal • Extensive problem-solving skills, with innovative and flexible solutions • Excellent time management with the ability to work autonomously, under pressure, manage multiple priorities and deliverables • Organised and energetic with a commitment for ensuring the delivery of a high-quality client experience • Proficient at working independently as well as part of a team.