

**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 to project manage the fitout and move for our new Head Office based at 2 Devonport Road, Tauranga. The role is responsible for:

- Leading project and operational delivery for the implementation of our new Head Office site.
- Managing project scope (including design), timelines, plan/reporting, resources, risk registers, execute, and monitor the 2 Devonport build, and exiting existing sites within approved budgets.
- Assisting/responsible for procurement, tender evaluations and contracts.
- Effectively managing stakeholders, working with Executive Representatives, General Manager, branch teams, IT, Marketing and People and Performance to drive a collaborative approach and successfully deliver project requirements. A key focus will be on change management.
- Monitoring and providing progress reports to the Property Manager, Executive, maintain and complete financial tracking to budget/cost reporting and ensure alignment with WIP and completion of fixed asset register.
- Assisting with other new builds and fitouts.
- Working with our delivery partners the incumbent must establish and strengthen good relationships (construction, architects, furniture, audio visual, security etc).

The role will be key in establishing our new Head Office site, and preparing the site for ongoing business-as-usual support.

## WHAT I DO

### PROJECT MANAGEMENT AND DELIVERY

- Lead the 2 Devonport project from its current state to operational handover, including managing make good and shut down of existing sites (Cameron Rd and Harington St sites). This includes accountability for the completion of project to time, scope, and within Board approved budget.
- Design, plan, scope, and schedule activities required to engage all parties for 2 Devonport.

- Engage with Delivery Partners (construction, lease, insurers, security, audio visual) to drive successful project co-ordination and delivery, including exiting existing sites.
- Complete tracking of project spend/cost reporting and maintaining delivery alignment with plan and budgets.
- Identify and escalate risks and issues to the Property, Executive and other parties as required.
- Complete WIP and Fixed Asset review and updates for 2 Devonport, Cameron Rd and Harington St and any associated paperwork for suppliers, insurers, regulatory and legal compliance.
- Ensure BCP disciplines are in place as part of the projects work.
- Ensure the project scope delivers to our Physical Site Security Policy.
- Develop the move plan to successfully move team members from current sites into 2 Devonport.
- Ensure successful exits of current leases.
- Use project management methodologies which are fit for purpose.
- Deliver value to the Project and Property Team

## STAKEHOLDER / CHANGE MANAGEMENT

- Build strong rapport with stakeholders, influencing key decisions and driving cross department cooperation.
- Ensure change management is incorporated as part of our approach, providing full visibility to Property Manager and Executives on progress.
- Provide clear communications with Management and Teams.
- Manage and engage with stakeholders/delivery partners 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

- Alternate 24/7 contact for Alarms nationwide – answering and responding to after-hours calls.
- Assist with other projects or other 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 or 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	<ul style="list-style-type: none"> <li>• Relevant tertiary qualification in Business, Administration, or related field (desirable)</li> <li>• Project Management certification/qualification (preferred)</li> </ul>
Knowledge/Experience	<ul style="list-style-type: none"> <li>• 5+ years of experience in project management roles</li> <li>• Project Management experience running successful end-to-end property projects, specifically build, fit out and moves, including using project management toolsets (essential)</li> <li>• Programme Management (desirable)</li> <li>• Change Management (desirable)</li> <li>• Financial services industry experience (desirable)</li> </ul>
Key Skills and Attributes	<ul style="list-style-type: none"> <li>• A proven ability to successfully plan, prioritise, and deliver a significant stream of works.</li> <li>• Highly competent in managing project; resources, dependency, delivery partners, including scope, and conflict management.</li> <li>• Budget modelling and cost reporting/management.</li> <li>• Highly motivated, collaborative, resilient individual capable of working in a dynamic environment.</li> <li>• Ability to establish and maintain strong relationships with a diverse range of internal/external stakeholders and delivery partners.</li> <li>• Pro-active and delivery focussed with excellent influencing abilities, listening and communication skills – both written and verbal.</li> <li>• Extensive problem-solving skills, with innovative and flexible solutions</li> <li>• Excellent time management with the ability to work autonomously, under pressure, manage multiple priorities and deliverables</li> <li>• Organised and energetic with a commitment for ensuring the delivery of a high-quality client experience</li> <li>• Proficient at working independently as well as a key contributor to the property team.</li> </ul>