



CANDIDATE BRIEF AND JOB DESCRIPTION FOR THE POST OF BURSAR (CHIEF OPERATING OFFICER)

Contents

- p. 3 Background
- p. 5 Summary of the Role
- p. 7 Organisation Chart
- p. 8 Main Duties and key responsibilities
- p. 10 Bursar – person specifications
- p. 12 Terms and Conditions of the Appointment
- p. 13 Applications and appointment process

Welcome from the Principal



Thank you for your interest in this important and exciting role. The successful candidate will be joining St Hugh's at an exciting time. One of the University's largest colleges, we play a pivotal role at Oxford. As we seek a new Bursar, we are about to refresh our strategy; we are working on some ambitious capital projects; and we have a full programme of academic activity to manage.

St Hugh's prides itself on our cutting-edge research, our welcoming and familial environment, and our academic endeavour. We're home to more than 800 students, with a rich history, and a bright future. The College is seeking to appoint a new Bursar – in essence a Chief Operating Officer – with the imagination and vision to help us thrive.

Please take some time to read this candidate brief, and understand a little more about our wonderful College. We are very much looking forward to welcoming you, to discuss your application further.

Background



St Hugh's College is one of the largest in the University of Oxford. Set in 14 acres of serene and beautiful grounds, St Hugh's is an ambitious College, originally founded in 1886 to educate poor women, and now home to more than 800 male and female, graduate and undergraduate students. St Hugh's has some 70 Fellows, in addition to 30 lecturers and a non-academic staff of 100. The College prides itself on the cutting-edge research of our academics, and our welcoming, informal culture for a diverse population of students and staff.

The Bursar is the Chief Operating Officer of the College, directing and supervising the senior management team in the execution of a wide range of functions. The role is broadly defined in the [College's Bylaws](#). She/he will be a Fellow of the College, accountable to, and a member of, the Governing Body. The Bursar will be responsible to the Governing Body for managing the College's financial, domestic and administrative affairs, as well as investment, grounds and buildings. She/he is responsible for advising on and implementing College policy in respect of health, safety and welfare and HR policy. She/he will also play a significant role in the governance of the College and its compliance with statutory regulation. The Bursar reports directly to the Principal for all management matters.

Over the past 6 years, St Hugh's College has implemented a strategy for ensuring its long-term financial sustainability, and greater inclusivity in its academic and collegiate life. This has included re-basing the budget; extending the financial and operational planning horizon and thinking creatively about income generation and streams of activity to support the strategic ambition. As the College moves forwards to drafting its new strategy, it does so with a renewed sense of confidence and ambition.

There are still challenges to face. St Hugh's College endowment stands at around £37 million. It has recently taken a £50 million equity loan to help it finance its ambitious capital plans and implement a programme of renewal and refurbishment of existing Estate. The College has recently constructed the stunning new Dickson Poon building, which houses the University of Oxford's China Centre. We are now planning an even more ambitious project to provide a social, academic and residential hub in the north-west corner of the estate. The new Bursar will take an active role in the design and delivery of this project (working closely with professional advisors and internal stakeholders) and will need strong experience of capital project management.

The College's annual [statutory accounts](#) and archives provide our financial statements from previous years.



Summary of the Role

The role of Bursar is essentially that of Chief Operating Officer, and the post holder will be expected to work at this level, in close partnership with the Principal, who takes a supervisory responsibility for the College as a whole; and the Senior Tutor, whose role encompasses all matters relating directly to academic members and students. While the Governing Body is the executive body of the College, these three officers among them take daily responsibility for implementing the decisions and strategy that Governing Body specifies.

The academic endeavour sits at the heart of all the College's activities, and the core purpose of the professional and support services is to enable the College's academic and intellectual life to thrive and flourish. The Bursar will need to be sensitive to the needs of an academic community and will understand the requirement always to recognise the needs of Fellows and students, while ensuring that the professional and support staff who are dedicated to providing and facilitating the structure within which the academic community operates are fully motivated, valued and supported.



The post calls for someone with excellent powers of leadership and team building. The Bursar will be directly responsible for the successful leadership and management (including line management) of the professional and support services within the College. The Bursar's direct areas of responsibility include the:

- Domestic Bursar (responsible for accommodation, catering, conference and events business, housekeeping)
- Head of Estates (responsible for maintenance, gardens, security (Lodge team))
- College Accountant (including management and statutory accounts, endowment, student hardship and funding)
- HR
- Bursary (responsible for governance and support)

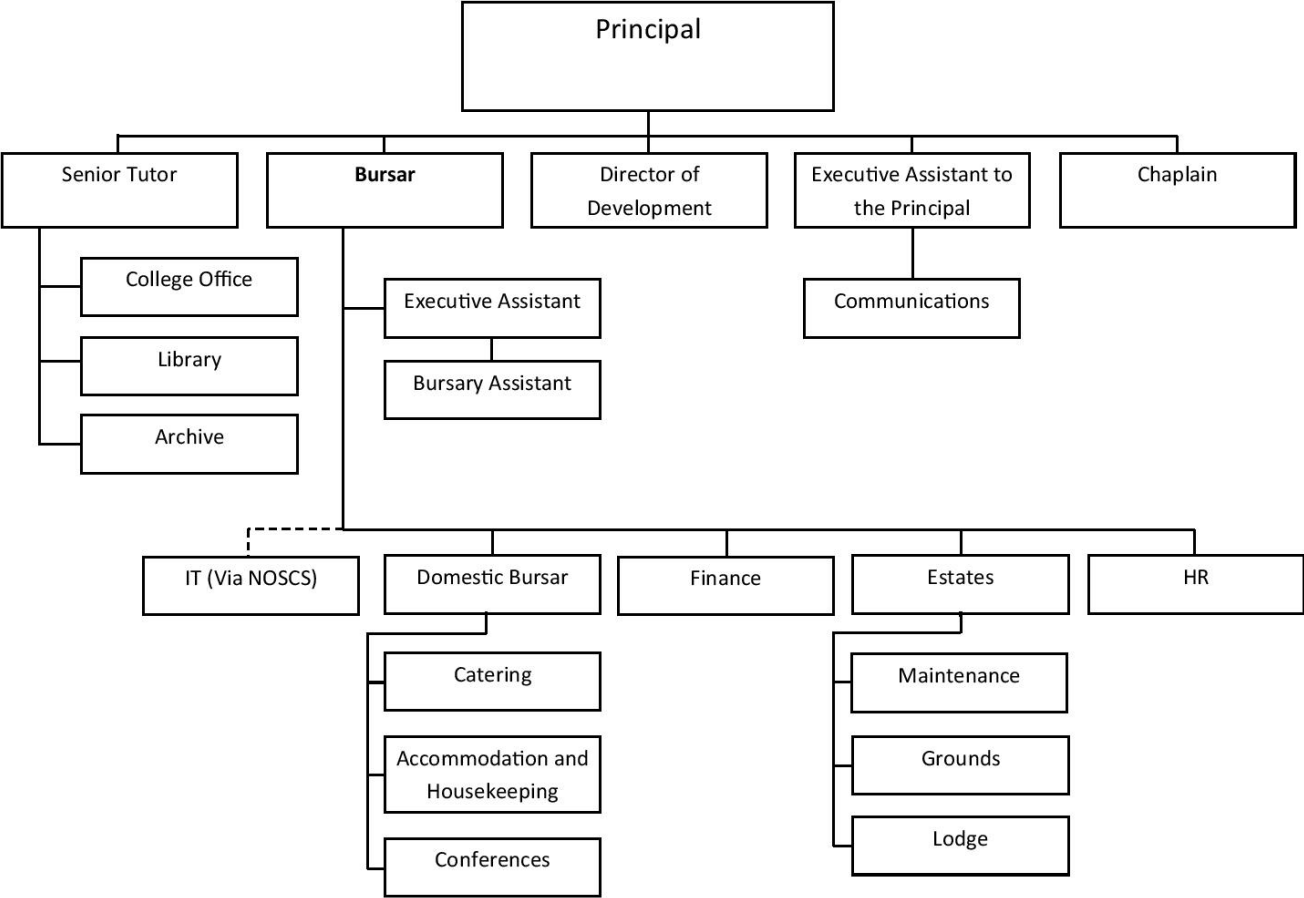
The Bursar will also provide strategic, HR and budgetary advice to the Director of Development, Academic Dean, Communications Manager and Librarian. The Bursar's role is to set the strategic direction and vision of these services, ensuring that they are aligned and contribute to the College's overall strategy within the regulatory framework defined by its Statutes and Bylaws, and in the wider University context. The Bursar plays a key role in advising Governing Body in the areas of policy, and in formulating and implementing the strategy for financial management, human resources, procurement and infrastructure.

The College operates within an annual budget set within the context of a five-year operational business plan formulated and refreshed annually by the senior management team. The overall budget is managed to a target retained cash surplus (currently 5% of turnover) each year, from which is derived a working capital reserve. Finance is of critical importance, both in terms of budget management, accurate accounting in line with the Charity SORP and demonstrating value for money to Governing Body. Investment management is another key area for the College. The Bursar will provide leadership in these matters as part of the senior management team. The postholder will therefore need to demonstrate sound financial acumen at a strategic level and the ability to present complex financial matters to Governing Body in a confident and comprehensible manner.

As Chief Operating Officer, the Bursar will liaise with internal stakeholders from across the College community (Fellows, students, staff, alumni) and will also provide a touch point within the Conference of Colleges, taking responsibility for a particular role within the Estates Bursars Committee to ensure the College voice is heard in the University's policy making fora.



Organisation Chart



Main duties and key responsibilities (to deliver or oversee):

Finance and Professional Support

- a) assisting Governing Body to determine the financial policies of the College, advise on their implications, and implement decisions;
- b) preparing annual budgets, controlling expenditure and reporting on performance against budget, ensuring that College meets its objectives for financial sustainability;
- c) overseeing the preparation of the annual statutory report and accounts for audit;
- d) overseeing the drafting and annual revision of five-year business plans and supporting budget forecasts for College as a whole, and for individual professional support functions;
- e) acting as the principal negotiator in all College contracts, identifying and appointing professional advisors as necessary and advising Governing Body on the appropriateness of draft contracts prior to committing College to them;
- f) overseeing the annual review of major risks;
- g) conducting the annual pay review and submit recommendations to Finance Committee and Remuneration Committee;
- h) conducting discussions with student members on prices and charges, and with staff on pay and conditions of work, including bonus structures where appropriate;
- i) responsibility for the contractual and legal aspects of employment of all college employees (academic and non-academic), ensuring that college employment policies are implemented, that employees have appropriate contracts and pension arrangements, and that accurate records are kept;
- j) overseeing the implementation of HR policies applicable to non-academic staff and to oversee the annual appraisal system for non-academic staff, and ensure that appropriate arrangements are made for training and staff development;
- k) ensuring compliance with all relevant Government legislation and regulations and serving as the College's Data Protection Officer, Information Officer, Publication Officer and Health and Safety Officer.

Domestic management

- a) assisting Governing Body in the determination of the domestic policies of the College, advising on their implications, and implementing decisions;
- b) overseeing the work of the professional support departments (Finance Office, IT Office, Estates Office, HR function, Domestic Bursary) and ensuring that all professional support areas work collaboratively and in the best interests of College;
- c) developing the Heads of professional services, providing leadership and challenge as well as support and development opportunities;
- d) overseeing the setting of targets for the development of conference and catering businesses to diversify College's income streams and contribute to overall financial sustainability;
- e) providing support to College committees where necessary;

- f) meeting regularly with the Presidents of the Middle Common Room (graduate students) and Junior Common Room (undergraduate students) to ensure they are kept abreast of developments in College and that College is meeting the needs and addressing any concerns of the student bodies.

Academic Support

- a) working closely with the Senior Tutor and Principal to ensure that the academic objectives of the College are met.

Fundraising and the Endowment

- a) supporting the Principal in overseeing the work of the Development Office so as to ensure the cost-effective implementation of the College's alumni relations and fundraising strategy;
- b) overseeing budget and HR issues within the Development Office, consistent with enabling them to pursue fundraising activities, including in particular potential major gifts;
- c) liaising with the Investment Committee and advising Finance Committee on portfolio management and income drawdown.

China Centre

- a) acting as the College's representative in liaising with the China Centre to ensure the relationship between College and the China Centre develops to the mutual benefit of both parties;
- b) negotiating and reviewing periodically the lease and service charging structure which applies to the China Centre occupation of the Dickson Poon building;

External Business

- a) keeping abreast of Government, University and other relevant initiatives which may have financial implications for the College, and advising Governing Body accordingly;
- b) representing the College on the appropriate inter-Collegiate bodies;
- c) overseeing compliance with statutory regulations;
- d) directing the subsidiary companies St Hugh's Conferences Limited and St Hugh's Estates Limited.

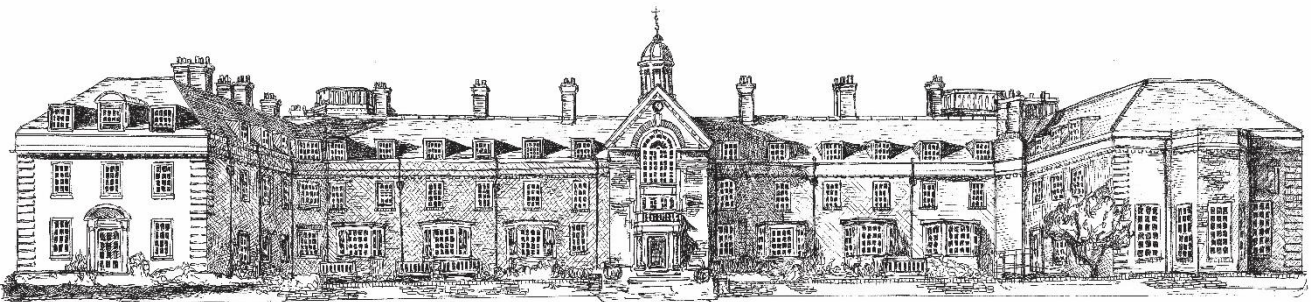
Bursar – Person Specification

	Area	Essential	Desirable
1	Knowledge and Experience	<ul style="list-style-type: none"> • Senior management experience in an organisation of similar or greater size/ complexity • Considerable knowledge of financial planning and budgetary management • A record of success in staff management and in applying strong resource management • Experience of planning at the strategic level • Experience in the development of policy • Experience in the management of change • HR/personnel policies 	<ul style="list-style-type: none"> • Extensive experience at similar level • Significant experience of managing personnel and other resources • Experience in providing support to Committees
2	Skills	<ul style="list-style-type: none"> • Excellent leadership and people management skills • Ability to develop and sustain strong working relationships and involve staff (academic and non-academic), students and other stakeholders 	<ul style="list-style-type: none"> • Previous experience of managing a complex organisation

		<ul style="list-style-type: none"> • Financial planning and management skills • Ability to develop systems and processes for effective service delivery 	<ul style="list-style-type: none"> • Previous experience of managing a budget in excess of £5M
	Skills <i>continued</i>	<ul style="list-style-type: none"> • Excellent analytical skills • Excellent communication skills both orally and in writing • Understanding of Health & Safety at Work and associated legislation • Understanding of current employment legislation • Good IT skills • Excellent negotiating skills 	<ul style="list-style-type: none"> • Previous experience of working in Higher Education
2	Personal Qualities	<ul style="list-style-type: none"> • Astute financial manager with commercial awareness and an ability to develop and execute strategies which balance multiple influencing factors; • Leadership and decisiveness, while empowering, motivating and guiding colleagues towards common goals; • Seeking and promoting excellence and achievement of results; • Demonstrating excellent written and verbal communication skills; • Respecting diversity and valuing others by promoting equality and opportunity and treating others with fairness, dignity and respect; • Evidence of leading role in successful change management projects. • Ability to manage crises effectively – show resilience under pressure • Motivated, committed, energetic, determined, positive, robust, sensitive, outgoing and approachable with strong personal energy levels and resilience • An eye for detail 	<ul style="list-style-type: none"> • Demonstrate successes
3	Qualifications	<ul style="list-style-type: none"> • Educated to degree or equivalent level 	

Terms and Conditions of the Appointment

- Salary will be in the range of £80,000 to £90,000 pa, reviewed annually. The post is pensionable with the Universities Superannuation Scheme (USS) and a current employer pension contribution of 19.5%. The Bursar is entitled to lunch and dinner in the College, free of charge, at all times of year when college meals are available. As a Fellow, the Bursar is eligible to apply to the College's Equity Housing scheme. There is an Oxford College health insurance scheme which the Bursar is eligible to join (at his/her own expense).
- The appointment is subject to successful completion of 12 months' probation. At the end of this period, the post-holder will produce a report which will be considered by remuneration committee before the appointment is confirmed.
- The appointment will be subject to a contract terminable during the first, probationary, year by one months' notice given by either party to the other, and thereafter terminable by three months' notice given by either party to the other. The Bursar's Fellowship will be co-terminous with the appointment.
- The Bursar will be entitled to 38 days annual leave including public holidays and the Christmas closure period. The times at which leave may be taken will be subject to the College's administrative needs. The Bursar will not take any employment or consultancy outside College without Governing Body's prior permission.



Application and appointment process

- Applications should be made by email or letter to Amanda Moss (Amanda.Moss@st-hughs.ox.ac.uk), for the attention of the Principal, Dame Elish Angiolini QC, St Hugh's College, St Margaret's Road, OX2 6LE, describing the way in which the applicant's skills and experience fit the job and person description. A curriculum vitae should also be included, nominating at least three referees.
- Shortlisted candidates will be given the opportunity to meet informally with some members of the selection panel, and will be provided with further information about the College.
- Shortlisted candidates will be asked to write a brief paper in advance (up to 1000 words) describing their vision for the post and how they would deliver on it.
- Applications close at 5pm on Thursday 31st October.

