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## Finance and Business Analyst Partner

### About Peppercorn Services

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Since 2001 Peppercorn has provided services to a wide demographic of people across the Hawkesbury and surrounding areas. Peppercorn's purpose is to enrich lives, through connections, partnerships and opportunities. Our services are underpinned by our value of trust, care, respect, agility and continuous improvement.

### Position Purpose

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The purpose of the Finance and Business Analyst Partner is to work collaboratively as part of the leadership team to guide Peppercorn in improving processes, services, and strategic outcomes through data analysis. The Business Analysis will engage with the leadership team to determine requirements, identify processes and deliver data driven recommendations.

The Finance and Business Analyst will review performance, processes and compliance to improve inefficiencies and increase business intelligence that informs strategic business decisions. With a strong reliance in information technology for forecasting, planning, reporting and analysis, the Finance and Business Analyst will monitor and report on performance, identify trends and provide recommendations for improvements where applicable.

A key focus of the position will be to develop strong working relationships with both internal and external stakeholders, including funders and donors.

### Organisational Relationships

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<b>Reports to</b>	Executive Officer
<b>Direct Reports</b>	Business Services Coordinator
<b>Delegation</b>	Manager

### Programs

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All Peppercorn programs and services

### Primary Objectives

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The primary objectives of the Finance and Business Analyst Partner is to:

- Monitor Peppercorn's compliance with its obligations against performance indicators
- Manage financial reporting and provide timely and appropriate financial analysis, strategic advice and support to the leadership team in financial decision making
- Review, manage and assist in grant applications to ensure sustainable business models
- Consolidate and integrate Peppercorn's financial systems and reporting frameworks.
- Review corporate services functions and implement solutions to optimise efficiency
- Implement strategies to ensure the financial effectiveness and minimisation of waste
- Project management and contractor coordination of business services projects

### Key Responsibilities or Accountabilities

KRA	Specific Tasks, Responsibilities and Outcomes
<b>Mission, Values and Behaviours</b>	<ul style="list-style-type: none"> <li>• Actively promote the Mission, Vision, Values and Strategy of Peppercorn Services.</li> <li>• Actively follow Peppercorn’s Code of Conduct.</li> <li>• Comply with the requirements of Peppercorns Policies &amp; Procedures.</li> <li>• Take appropriate action to ensure a workplace free from corruption, maladministration, and serious and substantial waste.</li> <li>• Ensure all interactions within the community portray Peppercorn as a professional and caring provider with a high standard of customer service.</li> <li>• Build and support relationships with key internal and external stakeholders</li> <li>• Contribute to leadership meetings and activities that are purposeful, collaborative and documented with clear objectives and outcomes</li> </ul>
<b>Work Health &amp; Safety</b>	<ul style="list-style-type: none"> <li>• Immediately cease, and report, any workplace activity (including that of other persons) which presents an immediate risk to safety, property or environment to your supervisor.</li> <li>• Follow all company instructions and directions in relation to workplace health and safety.</li> <li>• Undertake work in a safe manner to ensure personal health and safety, and that of others including other employees, clients, contractors, the public and visitors.</li> <li>• Ensure actions (or lack of) do not impact negatively on the health and safety of any fellow employee, client, public, contractor or visitor.</li> <li>• Ensure incidents and hazards are identified, reported, controlled.</li> <li>• Consult with workers on Work Health and Safety issues.</li> <li>• Coordinate the Safety Team Meetings</li> <li>• Oversee site management of Peppercorn head office</li> </ul>
<b>Promotion and Stakeholder Engagement</b>	<ul style="list-style-type: none"> <li>• Provide analysis of marketing activities return on investment</li> <li>• Prepare reports on survey findings and client recommendations</li> <li>• Provide Stakeholder engagement analytics on recruitment, social media and other marketing activities</li> </ul>

**Quality  
Management  
and Continuous  
Improvement**

- Ensure data and information systems are always maintained accurately
- Analyse and report on quality management strategies to ensure that quality standards and service goals are met.
- Provide advice on areas for improvement, gaps and inefficiencies pertaining to business results and system reviews.
- Actively participate in the development and review of Peppercorn policies and procedures.
- Where gaps are identified, document, action and review continuous improvement activities.
- Ensure feedback, incidents, complaints and compliments are reported, responded to and reviewed in accordance with relevant policies and procedures.
- Ensure adequate and appropriate insurance cover
- Action all non-conformance audit items to ensure continued improvement and compliance

**Professional  
Development**

- Attend regular supervision and annual performance reviews with direct line supervisor.
- Actively engage with professional development activities as approved or instructed by direct line supervisor.
- Participate in mandatory training and undertake professional development opportunities when presented.
- Maintain professional knowledge and skills by attending relevant conferences, workshops, courses, and training, and reviewing recent literature.
- Engage in regular reflection of work practice and team relationships.

**Leadership**

- Contribute to the development and implementation of Peppercorn's strategic and business plans
- Oversee Peppercorn's digital strategy and systems implementation
- Develop and lead a well skilled, solution-focussed, strengths-based, cooperative team.
- Work to build cohesive and co-working relationships across the organisation.
- Provide support, mentoring, supervision, performance management and development, succession planning and annual performance reviews of assigned employees (and volunteers).
- Ensure adequate coverage and business continuity of services.
- Facilitate team meetings and team building initiatives that are purposeful, collaborative and documented with clear objectives and outcomes.
- Assist with the recruitment, induction and training of employees, volunteers, and contractors.
- Undertake routine industry benchmarking to ensure performance in-line with industry standards

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**Business Planning and Development**

- Ensure that work is planned, is goal or outcome oriented, measured for success and reported against outcomes and contractual requirements.
- Provide input and assistance into business development, grants and tenders that support the strategic initiatives of Peppercorn.
- Lead meetings and liaise with funding contract managers.
- Work with external advisory and consultancy services as necessary

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**Financial and Asset Management**

- Develop organisational budgets and forecasts
- Manage Corporate Services budgets
- Manage and report on Peppercorn's asset management including depreciation, capitalisation, and replacement of assets
- Ensure adequate and appropriate insurance cover
- Undertake purchasing and financial approvals in accordance with approved delegation.
- Provide analysis and recommendations into the purchase, usage and maintenance of assets, facilities, and resources across the organisation
- Oversee the review and recommendation of timesheets of direct reports
- Provide advice, support, tools and training to the leadership team, relevant committees and team members on financial management issues and improvement measures
- Provide advice to the Executive Officer, Board and management team on financial performance, budgets, forecasts, and any other issues where financial expertise is required
- Ensure robust financial management controls and practices are embedded in accordance with best practice and Peppercorn policies
- Work collaboratively with the leadership team to develop financial risk minimisation plans to address the identified issues in a timely manner.
- Maximise Peppercorn's financial strength through effective cash flow management and appropriate investment strategies based on variance analysis.
- Manage the relationship with external auditors and financial institutions ensuring that Peppercorn meets all requirements for annual financial audits and statements.
- Comply with the Australian Accounting Standards and the ACNC Governance Standards
- Review and prepare organisational acquittals for the Executive Officer in accordance with funding agreements and timeframes
- Supervise accounts payable and accounts receivable,
- Oversee payroll including salary packaging, superannuation and taxation
- Comply with the Australian Tax Office requirements

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**Analytics**

- Monitor, analyse and report on Peppercorn's performance against key performance indicators, contracts, budgets and standards accurately and within required timeframes.

- Gather, interpret, and use complex data to develop actionable steps that will improve processes and optimise results
- Assess Peppercorn’s needs based on robust information that is analysed for trends or areas for improvement.

**Knowledge/ Skills/ Experience/ Qualifications**

*(Key Selection Criteria)*

- Essential**
- Relevant tertiary qualifications and experience as an analyst in Finance, Accounting, Economics or Business Administration
  - Strong leadership and change management experience
  - Strong communication with the ability to simplify information, discuss and present analysis outcomes and solution proposals
  - Knowledge and understanding of legislation, regulations, and standards relevant to finance and accounting
  - Demonstrated ability to recognise and implement streamlined organisational processes for productivity improvement
  - Demonstrated analytical and problem-solving skills
  - Demonstrated knowledge and competence in the use of information technology and information systems
  - Current NSW Drivers Licence and vehicle with minimum third-party property insurance
  - A National Criminal History Check and Working with Children check must be completed and cleared before employment may commence

- Desirable**
- Experience working in the human resources/ not-for profit sector

**Award and Classification**

**Award** Social, Community, Home Care and Disability Services Industry Award 2010

**Classification** Level 6

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**Current Incumbent**

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<b>Name</b>	Vacant
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**Acknowledgement:**

I accept the position description as stated above and understand that this position description supports my Employment Agreement.

I understand and accept that the position description may need amending and updating periodically due to changes in responsibilities and organisational requirements. Changes to the position description will be consistent with the purpose for which the position was established.

I understand and accept that this position description will be reviewed annually at the time of my performance review to ensure it accurately reflects the needs of the business.

I understand and accept that I may be required to perform duties and accept responsibilities from time to time that are not included in this position description to meet the operational needs of Peppercorn, as long as the additional duties and responsibilities are within my capacity, capability, expertise, skills and knowledge.

I understand and accept that Peppercorn may provide further training to ensure my continued competence and ability perform these duties, and that I will willingly undertake this continuing professional development.

Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Managers Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_