

POSITION TITLE: Business Partner FP&A

DEPARTMENT: Business Operations - Finance

DATE: January 2018

REPORTS TO: Chief Financial Officer (CFO)

Organisational Vision:

An inclusive world in which all persons with disabilities enjoy their human rights and achieve their full potential.

Organisational Mission:

CBM is an international Christian development organisation, committed to improving the quality of life of persons with disabilities in the poorest countries of the world.

Purpose of Role:

To perform key finance systems and planning functions of the organisation being 2IC to the Chief Financial Officer.

Level of Direction or Supervision:

This is a supervised role, however the position requires a significant amount of time and, task management; autonomy in achieving the position outcomes is to be expected.

Key Relationships

Chief Financial Officer, Financial Accountant, Department Managers and other Budget owners.

Key Tasks and Priorities:

Key Areas of Responsibility	Key Tasks	Performance Indicators	Weighting Total= 100
Finance Systems Administration, enhancements and employee support	<p>Administration</p> <ul style="list-style-type: none"> • Performing system administration tasks • Managing users, roles and delegation limits • Review and management of system upgrades 	<p>Administration</p> <ul style="list-style-type: none"> • Users, roles and delegations are accurate • System upgrades are reviewed and measures taken to 	25%

	<ul style="list-style-type: none"> • Resolving system issues that arise <p>Enhancements</p> <ul style="list-style-type: none"> • Identifying areas for enhancement • Preparing business case, costing and design for any identified enhancements • Implementation of agreed enhancements <p>Employee Support</p> <ul style="list-style-type: none"> • Induction of new employees in system use • Training of employees where enhancements are made • Responding to ad hoc support requirements 	<p>ensure no impact to users</p> <ul style="list-style-type: none"> • System issues are identified and resolved quickly <p>Enhancements</p> <ul style="list-style-type: none"> • Areas for enhancement identified • Planning, approval and implementation of enhancements completed • Employee acceptance of enhancements evidenced by feedback <p>Employee Support</p> <ul style="list-style-type: none"> • Employee induction completed within the first fortnight of employment • Employee training prepared and completed where needs are identified • Support requests are acknowledged and completed wherever possible within one business day 	
<p>Budgets and Planning</p>	<p>Preparation</p> <ul style="list-style-type: none"> • Working with Budget owners to collate annual Budget data inclusive of 5 year forecast • Working with budget owners to collate half year reforecast • Building and maintenance of Budget models 	<p>Preparation</p> <ul style="list-style-type: none"> • Annual Budget finalised with appropriate time for senior management review and Board approval • Half year reforecast finalised and approved prior to July reporting • Budget to be based on solid assumptions and drivers 	<p>20%</p>

	<ul style="list-style-type: none"> •Challenging of Budget assumptions <p>Financial Tracking</p> <ul style="list-style-type: none"> •Preparation for and attendance at monthly meetings with budget owners 	<ul style="list-style-type: none"> •Accurate budget timing <p>Financial Tracking</p> <ul style="list-style-type: none"> •Strong relationships with budget owners •Initiative taken to assist non-financial budget owners with financial analysis 	
International Program reporting and analysis	<ul style="list-style-type: none"> •Assist with International Program reporting and analysis •Prepare external funding acquittals •Administration of the Program financial database •Processing international transfers to programs •Processing invoices to funders •Review general ledger transactions for posting accuracy <p>Foreign Currency</p> <ul style="list-style-type: none"> •Assist with management and analysis of forward contracts <p>Accreditation and other program compliance</p> <p>Assist in the preparation for accreditation</p> <ul style="list-style-type: none"> •Assist in other program compliance activities as required 	<ul style="list-style-type: none"> •Program transfers checked and processed weekly within 24 hours •Funding acquittals accurately prepared and finalised prior to deadlines •Program transfers accurately and appropriately reported for non-financial users •Accurate monthly reconciliations •Strong relationship with International Programs Department evidenced by feedback <p>Foreign Currency</p> <ul style="list-style-type: none"> •Analysis and reporting of forward contracts well received <p>Accreditation and other program compliance</p> <ul style="list-style-type: none"> •High quality compliance activities are delivered to deadlines including but not limited to: <ul style="list-style-type: none"> • Annual ANCP financial reporting • RDE submission to DFAT 	15%

		<ul style="list-style-type: none"> • Other audits and acquittals 	
Contract reporting and analysis	<ul style="list-style-type: none"> • Assist with Inclusive Development contract reporting and analysis • Prepare external funding acquittals • Processing invoices to funders • Review general ledger transactions for posting accuracy <p>Contract Compliance</p> <ul style="list-style-type: none"> • Assist in contract compliance activities as required 	<ul style="list-style-type: none"> • Funding acquittals accurately prepared and finalised by the 6th business day after month end • Contract acquittals accurately and appropriately reported for non-financial users • Accurate monthly reconciliations <p>Strong relationship with Inclusive Development Department evidenced by feedback</p> <p>Contract Compliance</p> <ul style="list-style-type: none"> • High quality compliance activities are delivered to deadlines 	15%
Reporting	<ul style="list-style-type: none"> • Building new and customised reports as required • Delivery of monthly reports • Preparation of Board reporting • Preparation of reporting to international office 	<ul style="list-style-type: none"> • Reporting prepared as required • Initiative taken to identify and create enhanced reporting for users 	15%
New project costing	<ul style="list-style-type: none"> • Preparation of project costing as required 	<ul style="list-style-type: none"> • Accurate costing provided on a timely basis as required 	5%
Support Other Finance Functions	<ul style="list-style-type: none"> • Assist in preparation for annual audit and other compliance activities • Assist with cash management and analysis • Assist with other finance functions in response to additional 		5%

	<p>demands and staff resourcing.</p> <ul style="list-style-type: none"> • Ad Hoc duties as required by the CFO or COO 		
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SPECIFIC OUTCOMES REQUIRED
Collation and analysis of Annual Budget and half year forecast
Users of the system are trained and supported as required
System administration and enhancements are undertaken without disruption
External reporting prepared accurately and to deadlines
Program and contract compliance achieved and enhanced
Strong relationships with internal and external stakeholders
Relevant risk issues are identified with, appropriate mitigation strategies developed, implemented and maintained.

KEY COMPETENCIES OF ROLE
Qualified CA or CPA with at least 7 years practical experience.
Proven strong experience in planning, reporting and systems.
An ability to work independently, with initiative and sound judgement.
Ability to meet internal and external deadlines.
High-level interpersonal and written/verbal communication skills with a demonstrated ability to effectively communicate to non-financial people and translate sometimes-complex concepts in a way that is easily understood.
Able to establish strong, respectful and trusting relationships across all levels of CBM Australia.
Previous experience with NetSuite is favoured.
Focused on continuous improvement and development.
Knowledge and experience in a not for profit organisation and/or international development will be highly regarded.
Commitment to CBM's mission and values.
A willingness to contribute to the growth and development of CBM and its work.

JOB EVALUATION		
Factor	Level	Score
Responsibility and Accountability	5	208
Judgement and Decision Making	5	118

Interaction and Influence	4-5	86
Knowledge and Application of Creative and Technical Skill	5-6	300
TOTAL		712
Salary Grading		Grade 9

Signed

Signed

 Manager Name and Surname
 Chief Financial Officer

 Incumbent Name and Surname
 Business Partner FP&A

Date

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Date

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