

POSITION DESCRIPTION

Manager – Financial Planning & Analysis

Division:	Corporate Services
Department:	Corporate Services
Job Profile:	MGT Level 9
Banding or Award:	Non-Award Band D
Reports To:	General Manager – Business Analytics & Service Effectiveness

About Us

Ability Options is a not-for-profit organisation that is characterised by a strong Vision, continuous Mission, and universal Values. We keep the people we support at the centre of our hard work by providing Disability and Employment services across NSW. We offer vulnerable people high-quality services that foster their wellbeing and inclusion in the community. We pride ourselves on delivering a person-centred approach, highlighting people’s right to both choice and self-determination. We have a passion to make an impact on people’s lives. We champion all people to achieve their aspirations and goals, ensuring they are included in their chosen community and have access to a range of opportunities.

The Ability Options workplace is a safe and diverse environment that encourages strong leadership and innovation. People are our greatest asset, as our services create experiences and opportunities for our customers. Our personalised and responsive support is rewarding not only for people using our services, but also for our employees. We work alongside partners who share and exercise our Values of Trust, Inclusion, Respect, Courage and Leadership. Whether it is providing employment opportunities, giving work experience, or assisting people to live in various scenarios, we provide meaningful experiences, and inclusion for everyone.

Our Values



INCLUSION

We **embrace, encourage** and support **diversity** in everything we do



LEADERSHIP

We are a sector and service leader by **innovating, improving, and partnering** with others



COURAGE

We **act** on our **values** ensuring they are central to everything we do



RESPECT

We treat our participants, their families, communities, partners and each other with **dignity, appreciation, and recognition**



TRUST

We deliver on our promises, encourage feedback and work with **honesty and openness**

Primary Purpose

The Manager – FP&A is a critical leadership role that supports evidence-based decision making, performance analytics, and business growth and opportunity. The role focuses on solidifying the budgeting, forecasting and management reporting process for front line services along with streamlining the grant management process.

Key Accountabilities

Key Responsibilities

- Lead and manage the team of Business Analysts
- Develop, and report on service, team and functional KPIs. Agree Business Analyst team's Operational Plans and deliver them
- Develop reporting consistent with the organisation's strategy and KPIs
- Revenue accounting for Ability Options, including balance sheet reconciliations
- Lead the budgeting and forecasting processes and support Operations and Corporate functions to develop budgets and financial plans
- Grant management
- Provide advice on financial performance and recommendations on service improvements required based on analysis, identify opportunities to increase revenue and/or improve efficiencies
- Provide analytical, commercial and policy input into business decisions
- Prepare specialised reports and presentations to management, Board and Committees including performance reports and analysis
- Development of policies and procedures within the role scope
- Development of finance training programs and materials for operations and corporate functions
- Super user of budgeting software
- Monitor changes in funding and communicate impact to affected internal stakeholders
- Continuous improvement within the function

Organisation/Sector Knowledge

- Maintain sound knowledge of relevant legislative and contractual requirements.
- Understand how the various sectors in Ability Options work and are funded, including DSS DESE and NDIS

Teamwork & Culture

- Demonstrate the Ability Options values in the performance of duties, promoting a positive organisational culture and leadership contribution

Communication

- Maintain effective relationships with relevant stakeholders (internal or external)
- Advise manager in a timely manner on significant business matters including those arising through analysis
- Provide prompt, thorough, and accurate information to manager to keep him/her appropriately informed on progress of activities
- Provide timely and regular reporting (written and oral) to both internal and external stakeholders
- Build and maintain an effective network of both internal and external stakeholders (including government departments)

Service Excellence

- Perform analysis and reports on analysis and make recommendations
- Respond to requests of information from both internal and external stakeholders

Business Excellence – Continuous Improvement

- Conduct all operations efficiently and effectively and continuously review and improve

Financial Sustainability

- Provide leadership to ensure Towards 2030 Ability Options Strategy is delivered
- Conduct all operations in a cost-effective manner
- Identify a program of improvements to services, to increase effectiveness, efficiency and deliver growth

Risk Management – Compliance – WHS

- Apply Ability Options Risk Management Framework to all operations [including those provided by external suppliers] and risks mitigated
- Demonstrate compliance with all quality, contractual and legislative obligations
- Consider and promote the physical & psychological safety of Ability Options People and other stakeholders

Position Dimensions

Responsible for the performance of a team of Business Analysts. Decision making is subject to Delegation Policy, relevant legislation, regulations, Ability Options policy and procedure and in conjunction with divisional executive.

Key Relationships

Internal

- Board & Committees
- CEO and Executive
- Finance Team
- Managers
- Employees and Services

External

- Regulatory Authorities
- Funding Bodies
- Other partners and potential acquisitions

ESSENTIAL CRITERIA

- A strong team player who can work autonomously when required
- Strong sector knowledge including funding mechanisms, comparator/benchmark data
- Knowledge of opportunities and operational services and expected standards
- Communicates technical subject matter clearly and concisely to individuals from various backgrounds.
- Ability to analyse complex data, identify core issues, investigate, evaluate and reach appropriate conclusions/solutions
- Solid problem-solving skills
- Solid understanding of accounting principles.
- Highly organised
- Demonstrated strong interpersonal skills
- Demonstrated business acumen –planning, continuous improvement
- Demonstrated experience in analysing data , reporting and budgeting
- Ability to liaise effectively with clients, customers, external agencies, government departments and other stakeholders
- Advanced user of Excel and systems-savvy
- Valid Driver licence
- CA or CPA qualification or equivalent
- Valid NDIS Worker Check
- Valid Working With Children Check

DESIRABLE CRITERIA

- Knowledge and experience of the various information gathering and operating platforms Ability Options uses such as Bridge, Sage, Salesforce, Navision, Board Analytics etc.
- 5+ Years FP&A experience, with 2+ years in management capacity
- Senior experience in Disability and/or Employment services

SIGN OFF

Employee Name:

Signature:

Manager Name:

Signature:

Date:

VERSION CONTROL

PD DEVELOPED BY:

Nick Stojanovski – General Manager – Business Analytics & Service Effectiveness

PD APPROVED BY:

Marina Korneeva - CFO

REVIEWED BY HR:

Kelly Kean- Senior Manager – HR Operations

PD EFFECTIVE DATE:

August 2024