
POSITION DESCRIPTION: Senior Finance Officer

Position:	Senior Finance Officer
Position status and location:	Member of the Finance Team and based in the Wellington office
Reporting to:	Chief Financial Officer
Day to day reporting and oversight:	Chief Financial Officer
Staff reports management:	None
Salary range:	Group 5, steps 16 to 19 (starting rate based on prior relevant experience; progression to top step via automatic increment)
Cost Code sign-off:	none
Date of PD confirmation:	April 2024

Our organisational values

The PSA *He Pukenga Here Tikanga Mahi* takes a strategic approach to unionism and our organisational values are:

- Solidarity - Kotahitanga
- Social Justice - Pāpori Ture Tika
- Integrity and Respect - Te Pono me te Whakaute
- Solution focussed - Otinga Arotahi
- Democratic - Tā te Nuinga e Whakatau ai

Te Tiriti o Waitangi/Treaty of Waitangi

The PSA *He Pukenga Here Tikanga Mahi* is a Te Tiriti responsive organisation that affirms Te Tiriti o Waitangi as the founding document of Aotearoa. We are committed to the Treaty provisions of partnership, protection, and participation in activities pursuant to the purpose and objects of the union, as they relate to the working lives of members.

PSA gives the principles of Te Ao Māori practical application through our policies and strategies, to make a positive difference across PSA and our membership.

Purpose of this position

To support the Chief Financial Officer, through carrying out monitoring and analysis, drafting policy, enabling full compliance with all financial obligations, undertaking financial reporting as required across the organisation, including to the leadership team and the executive board.

This role provides senior-level guidance and support to the Finance Team. The SFO will also be alert to opportunities for systems improvements and work with the CFO and the team in enhancing efficiency and accuracy.

The role will also carry out some CFO duties when the CFO is absent.

Working relationships

Internal	Internal democratic structure	External
Chief Financial Officer Finance Team Assistant Secretary - Operations and systems Leadership team National sector and support leaders Budget holders Information Technology team He Tanga He Ahurea	Executive Board Treasurer	External auditors Taxation advisor Commercial contractors Investment partners Financial software providers Bank Regulatory authorities

Key Accountabilities	Activities
Reporting	<ul style="list-style-type: none"> • Provide updates to the leadership team as requested. • Prepare investment reports. • Support the CFO in providing reports to the Executive Board • Assist the CFO with the preparation of the annual financial statements • Work with the PSA Treasurer to prepare the regular Treasurer’s Report • Provide supplementary and background information for any financial reports. • Provide monthly reporting on income and expenditure to budget holders and advise them of any issues noticed. • Monitor and report on capital expenditure

Key Accountabilities	Activities
Financial analysis	<ul style="list-style-type: none"> • Analyse financial data as requested. • Advise and support the Leadership team with financial analysis associated with major areas of expenditure, such as workforce expenditure implications. • Review monthly accounts for accuracy and completeness, and advise CFO about any inconsistencies or suggested remedial actions
Budget management	<p>With oversight from the CFO:</p> <ul style="list-style-type: none"> • Communicate budget planning process with budget holders • Support budget holders to develop budgets • Ensure all budgets have been entered into the budget software • Prepare consolidated budget reports for review • Adjust budgets prior to confirmation by Executive Board • Assist the CFO with the budget review process during the year and with periodic forecasting.
Contractual obligations	<ul style="list-style-type: none"> • Work with CFO on oversight of leases relating to the fleet and facilities, and other contractual obligations. • Maintain oversight of the fixed assets register and manage the regular stocktake process.
Compliance and audit support	<ul style="list-style-type: none"> • Monitor budget use and take steps to address any issues or inconsistencies. • Ensure that all processes and outcomes are consistent with professional audit standards. • Monitor compliance with the financial delegations policy and ensure the schedule of delegated financial authorities is maintained and up-to-date.

Key Accountabilities	Activities
Policy drafting and review	<ul style="list-style-type: none"> • Upon request, advise on the financial implications of new or updated policies (operational and employment) • Upon request, review any policy proposals for financial implications, and provide advice.
Continuous improvement	<ul style="list-style-type: none"> • Participate in any improvement activities or projects in the Finance portfolio. • Actively look for and advise on systems improvements in the Finance portfolio. • Participate in working parties, upon request, where a senior level of finance advice and support may be necessary.
Constructive team participation	<ul style="list-style-type: none"> • Support and advise Finance Team members. • Act as a mentor to Finance team members upon request. • Work collegially and co-operatively within the wider PSA, including providing technical assistance to other staff as able. • Comply with PSA policies and strategies. • Attend team meetings. • Actively participate in all team activities • Respect each other's view on matters. • Keep team members informed, as appropriate. • Maintain professional and constructive relationships with the people in the "Working Relationships" table above

Person Specification

Skills/Attributes

- Manage time and work to deadlines both internal and external.
- The ability to work methodically, systematically and with an eye for detail.
- Conscientiousness
- Able to maintain discretion and confidentiality.
- Ability to think creatively.
- A good level of Excel spreadsheet experience and ability.
- The ability to identify potential financial problems and generate solutions.
- The ability to collect, process and analyse information.
- Excellent communication and interpersonal skills
- Excellent analytical and problem-solving skills.

Knowledge

Have demonstrated technical knowledge, understanding and ability in the following:

- As a senior role within the Finance Team, proven experience in working as part a finance team is essential.
- In depth knowledge of and experience with financial resources methodologies and techniques.
- Good knowledge of management accounting
- Good knowledge of financial accounting
- Good knowledge of cost modelling
- Good knowledge of financial reporting
- Experience in using financial management information systems
- Familiarity with Microsoft Business Central, PayGlobal, Magiq (or other budgeting and forecasting software) or the ability to learn such packages.

A tertiary qualification in accounting/finance is an advantage.

PSA Employment Principles

The management of the *PSA He Pukenga Here Tikanga Mahi* is committed to being a good employer and providing a quality working environment; a process of constructive engagement with staff through their unions; and operating fair, transparent and consistent best practice employment processes, and good faith principles.

Health and safety

Every staff member shall take all practicable steps to ensure their safety and the safety of others at work and that no action or inaction of the staff member causes harm to any other person.

Professional Development

PSA staff members attend to their own personal and professional development. They provide collegial support to co-workers and contribute to the mentoring of less experienced staff. Staff will also participate in individual and collective professional development.