

Financial Performance & Analysis

Coordinator

Group	Organisational Performance
Department	Finance
Job Family	Finance
Classification	Senior Officer
Approved by	General Manager Organisational Performance
Date	May 2022
Position Purpose	The Financial Performance and Analysis Lead delivers and executes a range of services throughout the Barwon Water Group, including corporate planning, business partnering, external and regulatory reporting, business performance reporting, analytics and Board reporting.

Organisation context

Recognising the challenges of climate change, population growth, rapid technological advancement and economic transition, we are shifting our mindset from water utility to being a leader of the region’s prosperity.

Our vision for regional prosperity not only encompasses economic, social, and environmental elements, but also recreational and cultural elements, including enhancing Aboriginal values.



Organisational Performance group

The purpose of the Organisational Performance group is to integrate people, process and systems to drive a high performance workplace to deliver Strategy 2030. We will achieve this through fiscal financial performance, a constructive values based culture, consistent leadership, strategic human resources and a high performing safety culture. Organisational Performance will ensure an organisational culture that delivers outstanding business results and positions Barwon Water as an employer of choice in the region.

Finance department

The Finance Department delivers on the Barwon Water Group’s financial accountabilities, incorporating treasury management, taxation obligations, remuneration services, statutory reporting, financial business planning and budgeting, asset accounting and accounts payable

function. The department ensures strong fiscal outcomes through robust internal control systems and processes whilst ensuring all regulatory and legislative obligations are met.

Organisational relationships

Reports to	Manager Finance
Directly supervises	Business Analyst, Finance Business Partners

Accountabilities

As the Financial Performance & Analysis Lead, you will have overarching responsibility for:

Lead the Corporate Planning and Forecasting Process for the Group

- Lead the Annual Planning and Quarterly Forecasting process and coordination and delivery of the annual rolling 5 year corporate plan.
- Ensure that the 5 Year Corporate Plan and Annual Planning Targets have been applied in the business' financial budgets and associated targets/KPI's.
- Present and communicate the 5 Year Corporate Plan to the SLT, Board and external stakeholders.
- Present and communicate the financial budgets, key drivers, assumptions, opportunities and risks for each business area supported.
- Analysing drivers, data, trends and analytics, provide monthly performance outlooks and quarterly financial forecasts.
- Develop tailored measures and performance indicators that will provide an early view of future financial performance.
- Present and communicate the financial budgets, forecast key drivers, assumptions, opportunities and risks throughout the business.
- Ensure that the Balanced Scorecard includes appropriate measures and targets that reflect the effective delivery of the Corporate Plan and these can be reliably measured.
- Prepare papers, presentations and verbal updates to the Executive Leadership Team (i.e. EPMO, Business Performance Updates) and the Board.
- Bring a continuous improvement approach to all aspects of the corporate planning and forecasting processes.

Lead and assist the Finance Business Partners and Business Analyst to provide advice, insights and decision support services to the Barwon Water Group

- Provide insights, advice and reporting on the day to day financial performance to General Managers, BAS and their teams in the delivery of their financial budgets and forecasts.
- Promote the Finance brand through proactive, collaborative and constructive behaviours
- Provide the necessary level of financial and commercial analysis for the business to make pricing decisions (non-regulated revenues).

- Support the development of business cases, variations and associated funding requests.
- Develop a suite of standardised reports that will be consistently applied in the reporting and analysis of financial results throughout the Group.
- Utilise existing or develop new financial models to deliver forward looking projections that are aligned to operational business drivers.
- Through data driven analytics, deliver analysis that provide insights on how future financial performance can be improved.
- Identify areas of opportunity to reduce costs, increase non-regulated revenues and optimise cash flows which will contribute to the delivery of efficiency and savings initiatives.
- Prepare relevant materials and presentations to management and the Board.

Lead, coordinate and assist with Business Performance Reporting

- Prepare papers for the monthly ELT Business Performance Reviews. *
- Prepare papers for the Board as required. *
- Monthly Board papers on financial performance including the Balanced Scorecard. *
- Prepare papers for Quarterly and other mandatory updates to DELWP, DTF, ESC and other key stakeholders. *
- Develop a suite of standardised reports that will be consistently applied in the reporting and analysis of financial results throughout the Group. *
- Prepare relevant materials and presentations to management, EPMO, Executive Leadership Team and the Board.
- Attend and proactively participate in relevant management forums and project control boards, present to external agencies, the ELT, Barwon Water and BAS Board (as required).

* In collaboration with Manager Finance

Assist with the preparation of the ESC Price Submission and other strategic projects (as required)

- Assist in the preparation of financial data and financial modelling for inclusion in the price determination model.
- Act as a financial work stream lead in the ESC Price Submission
- Provide for ongoing review of performance against current Price Submission.
- Participate in the review and justification process of the draft price submission, providing financial analysis as required to assist in the consultation process with the ESC.
- Provide commercial and financial assistance to any key strategic projects and initiatives as required.

People Leadership

Barwon Water will comprise a diverse and accountable organisational culture, enabled through inclusive leadership and aligned to strategy, values and behaviours.

- Adopts best practice people management philosophy to motivate and inspire through high performance- performance management, providing meaningful feedback, mentoring, coaching and development, hiring.
- Confidently drives, and supports change throughout the organisation to ensures sustainable outcomes, including directly engaging adversity and navigating through challenging circumstances.
- Champions team engagement and promotes high performance by motivating and enabling people to make the necessary changes to efficiently deliver our organisational strategy.
- Promotes and fosters collaborative team and stakeholder relationships based on growth and resilience, integrity, accountability and inclusion, and lives to the Barwon Water value of 'Leadership'.

Health, Safety & Wellbeing

Barwon Water is committed to providing a safe and healthy work environment to all employees. Employees are expected to perform their duties in accordance with the Occupational Health & Safety Act 2004 and all regulations, codes of practice and organisation policies and procedures. In addition, employees are expected to:

- Lead the development of SQE processes and systems within the team.
- Promote and demonstrate Barwon Water's high standards in relation to health, safety, environment and quality, championing a culture of safety in the workplace.
- Report unsafe work practices, incidents, hazards and near misses, and unacceptable workplace behaviours.

Competencies

Growth & Resilience	Brings a growth mindset and personal resilience.
Action & Accountability	Drives outcomes with purpose, ambition, accountability and action.
Business Acumen	Delivers with commercial and organisational nous.
Collaboration	Collaborates effectively across the business, organisational boundaries, with customers and established partners.
Communication	Engages and communicates with clarity, vision, purpose and impact.
Customer, Community & Partnership	Creates measurable customer, partner and community value.
Inclusion	Open and accepting of different ideas and experiences, groups and people harness their potential.
Innovation & Continuous Improvement	Actively drives continuous improvement and innovation.
Managing Ambiguity	Operates effectively, even when things are not certain or the way forward is not clear.
Strategic Focus	Sees ahead to future possibilities and translates them into breakthrough strategies.

Performance level

Action & Accountability	<p>The Financial Performance and Analysis Lead has a clear understanding and focus on the operational and strategic objectives of the department. Under delegated authority, the position is responsible for the development of complex pricing proposals in a highly regulated environment, translating the pricing plan into a corporate financial plan.</p>
Judgement & Problem Solving	<p>The Financial Performance and Analysis Lead is highly competent and capable of operating independently, able to resolve problems which require analytic reasoning and comprise of integration of wide-ranging and complex information, across the specialties of the team including corporate planning, capital management and setting strategic plans.</p>
Specialist Knowledge & Skills	<p>The position requires the Lead to have significant experience in the application of financial and government legislation and policies in order to direct the actions of the Financial Performance and Analysis Team. This will include an inquiring and inquisitive mindset, utilising creativity and innovation to think more broadly to address and resolve major issues.</p>
Management Skills	<p>The position will be responsible for the management of a number of employees with specialist skills. This position will be required to manage employees, work programs or major projects utilising leadership, evaluation and monitoring skills to facilitate achievement of department objectives. The Financial Performance and Analysis Lead will be dedicated to the development, coaching and mentoring of our people, promoting a culture of cross skilling and further enhancing the financial and business acumen throughout the department. The Lead will direct the team in the planning, implementation and review of work outcomes as well as participating as a key member of a functional team. They will be able to generate innovative approaches to more effectively deploy resources, meet changing circumstances and improve services.</p>
Interpersonal Skills	<p>The position requires the Lead to have the ability to influence, persuade, lead and motivate the members of the Financial Performance and Analysis Team in order to achieve the various goals and objectives of the team. This will require the person to have excellent interpersonal skills, capable of developing effective relationships across the department and engaging with the people in the most effective way to deliver outcomes.</p>
Qualifications & Experience	<p>Extensive relevant and practical experience in a financial role, management experience and suitable qualifications including:</p> <ul style="list-style-type: none"> • Degree and/or Masters in finance, business or commerce • Post graduate accounting or commerce qualification preferred (MBA/CA/CPA)

Success profile

- Solutions orientated leader adopting a commercial and practical approach, proven in your ability to lead teams in development and capability enhancement.
- Well demonstrated business acumen, with a strategic mindset and strong attention to detail. Naturally inquisitive and inquiring, able to constructively challenge the status quo to deliver best for business outcomes.
- Proven ability to provide financial guidance and support to stakeholders, whilst driving financial accountability in the business
- Collaborative leader who works extremely well in dedicated and matrix team environments.
- Exemplary communication, stakeholder engagement and influencing skills, along with excellent customer service and business partnering skills.
- Outstanding written presentation skills and with demonstrated experience in preparing presentation papers on financial and business performance.
- Outstanding verbal presentation skills with significant experience in presenting proposals to management teams, Boards and external stakeholders.

Equal opportunity

Barwon Water offers a work environment free of discrimination, sexual or other harassment, victimisation, vilification and bullying. Employees are expected to contribute to the maintenance of such a work environment.

Risk and Compliance Management

Barwon Water is committed to a structured approach to Fraud and Corruption and Risk and Compliance Management in support of its business objectives, including the delivery of safe and reliable water, sewerage and recycled water services to our customers and community. Barwon Water shares responsibilities for these activities across the organisation and expect employees to perform their duties in accordance with policies and procedures.

Signatures

Manager Name (print)

Manager signature

Date

Employee Name (print)

Employee signature

Date

We understand that life balance is an important part of our employees' lives. Barwon Water offers a wide range of flexible arrangements to enable you to balance your work with other commitments and activities including family, health, study, carer responsibilities, hobbies and life/career aspirations. We provide various options such as flexible start and finishing times, working part time, job sharing, working from home and paid leave provisions that can be negotiated to help balance your personal commitments with the demands of the role.