

POSITION DESCRIPTION



Finance
Chief Operating Officer Portfolio

Senior Financial Planning & Analyst

POSITION NUMBER	0033866
PROFESSIONAL CLASSIFICATION STANDARD/SALARY	UOM9 \$139,693 - \$145,339 per annum
SUPERANNUATION	Employer contribution of 17%
WORKING HOURS	Full-time
BASIS OF EMPLOYMENT	Fixed Term until October 2025
OTHER BENEFITS	https://about.unimelb.edu.au/careers/staff-benefits
HOW TO APPLY	Online applications are preferred. Go to http://about.unimelb.edu.au/careers , select the relevant option ('Current Opportunities' or 'Jobs available to current staff'), then find the position by title or number.
CONTACT FOR ENQUIRIES ONLY	Nicola Robertson Tel +61 409 709 271 robertson.n@unimelb.edu.au <i>Please do not send your application to this contact</i>

For information about working for the University of Melbourne, visit our website:
<http://about.unimelb.edu.au/careers>

ACKNOWLEDGEMENT OF COUNTRY

The University of Melbourne acknowledges the Traditional Owners of the unceded land on which we work, learn and live: the Wurundjeri Woi Wurrung and Bunurong peoples (Burnley, Fishermans Bend, Parkville, Southbank and Werribee campuses), the Yorta Yorta Nation (Dookie and Shepparton campuses), and the Dja Dja Wurrung people (Creswick campus).

The University also acknowledges and is grateful to the Traditional Owners, Elders and Knowledge Holders of all Indigenous nations and clans who have been instrumental in our reconciliation journey.

We recognise the unique place held by Aboriginal and Torres Strait Islander peoples as the original owners and custodians of the lands and waterways across the Australian continent, with histories of continuous connection dating back more than 60,000 years. We also acknowledge their enduring cultural practices of caring for Country.

We pay respect to Elders past, present and future, and acknowledge the importance of Indigenous knowledge in the Academy. As a community of researchers, teachers, professional staff and students we are privileged to work and learn every day with Indigenous colleagues and partners.

THE UNIVERSITY OF MELBOURNE

Established in 1853, the University of Melbourne is a leading international university with a tradition of excellence in teaching and research. The main campus in Parkville is recognised as the hub of Australia's premier knowledge precinct comprising eight hospitals, many leading research institutes and a wide-range of knowledge-based industries. With outstanding performance in international rankings, the University is at the forefront of higher education in the Asia-Pacific region and the world.

The University employs people of outstanding calibre and offers a unique environment where staff are valued and rewarded.

Find out more about the University's strategy, 'Advancing Melbourne' at <https://about.unimelb.edu.au/strategy/advancing-melbourne>

CHIEF OPERATING OFFICER PORTFOLIO

The Chief Operating Officer (COO) Portfolio enables quality outcomes for students, staff and partners by delivering University-wide services and operational support to meet the organisation's evolving needs and strategic goals. The portfolio also works in partnership with teams across the University to drive innovation, transformation and improved performance, within and across functions. It is responsible for the University's budget and financial performance, and the management of its property and capital.

The COO Portfolio is comprised of six sub-portfolios covering all areas of our operations:

Business Services

Chief Financial Officer (see below for further detail)

Legal and Risk

Operational Performance Group

Research, Innovation and Commercialisation

Student and Scholarly Services

CHIEF FINANCIAL OFFICER GROUP

The Chief Financial Officer (CFO) Group provides financial expertise and leadership to ensure the University remains financially sustainable in the short and long term. It does this by:

- Developing and implementing financial strategy;
- Allocating financial resources efficiently and effectively to strategic and operational goals;
- Monitoring, analysing and assessing financial and business performance and position;
- Highlighting risks and opportunities and recommending or implementing actions;
- Ensuring value for money in commercial dealings; and
- Ensuring compliance with relevant financial legislation and obligations

ABOUT THE ROLE

Position Purpose:

The Senior Finance Analyst is a highly interactive and visible role that provides financial analysis and insights to senior management contributing to the short and long-term financial sustainability of the University.

This position plays a key role in supporting the Associate Director, Financial Planning & Analysis in the coordination of the financial planning cycle and the provision of associated planning guidance to Finance Business Partners within service clusters. The Senior Finance Analyst monitors and assesses University and Division level financial performance through data driven analysis and communicates insights to Governance Committees that are tailored to the audience and drive and inform key business decisions.

You have a passion for numbers, data visualisation and “story telling” and finding new ways to improve the efficiency and accuracy of financial planning processes across the University.

Reporting line: Associate Director, Financial Planning and Analysis

No. of direct reports: 0

No. of indirect reports: 0

Direct budget accountability: N/A

Key Dimensions and Responsibilities:

Task level: Significant

Organisational knowledge: Extensive

Judgement: Significant

Operational context: University wide

Core Accountabilities:

Financial Planning

- Support the Associate Director, Financial Planning & Analysis lead the annual financial planning and analysis cycle across the University.
- Contribute to the development and maintenance of the University Financial management model and framework ensuring that principles and processes evolve as the business needs, drivers, and the operating environment change.
- Assist with the consolidation and preparation of the University's periodic forecast, annual budget and longer term financial outlook. Ensure that the University's business operations and strategic goals are adequately supported and resourced, while maintaining a sustainable financial position.
- Assist with ensuring that overall University financial targets are met, are cascaded to the faculty and Chancellery level, timelines are met, issues are resolved, risks mitigated, and opportunities considered.
- Development and consolidation of templates for long-term financial plans, including the University Financial Outlook (UFO) and Faculty & Chancellery Financial Outlook (FCFO), including analysis to support strategic decision-making.
- Development of planning and budget analysis templates to enhance the forecasting and budgeting process. Conducts detailed analysis to identify key drivers and ensure the University's business operations and strategic goals are well-supported and resourced, while maintaining financial sustainability.
- Develop models for key planning inputs, including Research Block Grants, Chancellery allocation model, strategic allocation model, etc.
- Provide support for the University's planning tool (Hyperion) by coordinating the upload of key planning data, such as Student Scenario Modelling (SSM), Trust and Gifts model, and University allocations. Ensure data accuracy, system integration, and confirm the tool is functioning as expected throughout the process.

Financial Analysis, Insights and Reporting

- Coordinate and prepare monthly financial performance reporting packs to University Executive, Finance Committee and other governance bodies that highlight financial risks, opportunities and support informed decision making.
- Ensure that financial reporting to University governance committees is fit for purpose, concise, relevant to the audience.
- Use data and metrics to provide timely, accurate and meaningful financial analysis and commentary that highlights drivers of performance, opportunities, risks and implications for the outlook period and recommends and implement solutions where relevant.
- Identify and communicate financial risks and opportunities to enable University leadership to make sound business decisions.
- Monitor short and long-term financial performance of the University's Academic and Administrative divisions and assess the accuracy and reasonableness of financial projections.
- Coordinate quarterly financial performance reporting for the University's subsidiaries and prepare a summary of financial results, risks and opportunities for Finance Committee and University Executive.
- Perform ad hoc internal and external financial analysis responding to requests from management.

Collaboration and engagement

- Contribute to development and maintenance of training and development frameworks for financial planning and analysis matters.
- Establish and maintain effective working relationships with key internal stakeholders, in particular other shared services areas such as Finance Business Partners in service clusters, Research Industry and Commercialisation(RIC) Business Partners, Business analysts and Business Intelligence and Reporting (BIR).
- Collaborate with Strategic, Planning & Performance, Strategic Financial Initiatives and Corporate Finance to drive greater connection and integration of key planning processes.

Selection Criteria:

Education/Qualifications

1. Fully qualified Chartered Accountant (CA) or Certified Practising Accountant (CPA); Chartered Institute of Management Accountants (CIMA) or
2. Graduate or postgraduate qualifications in Finance, Accounting or other relevant discipline, or an equivalent combination of tertiary qualifications and relevant experience.

Knowledge and Skills:

3. Demonstrate COO values by acting in the best interest of your employer; displaying service excellence by striving to deliver beyond expectations and taking ownership of the delivery; and value working collaboratively, connecting with people and building relationships in your workplace.
4. Expertise and knowledge of financial management, financial planning and associated processes in complex environments.
5. Demonstrated ability and passion to work closely with stakeholders to develop a deep understanding of the business.
6. High level of attention to detail, advanced analytical skills and ability to work in complex and faced paced environments.
7. Excellent written and verbal communication, including the ability to prepare clear, concise outputs from detailed financial analysis to enable informed decision-making.
8. Excellent data visualisation and “story telling” capability to distil complex numbers and findings into meaningful information
9. Ability to present analysis to very senior stakeholders and vary style and presentation to enhance understanding
10. Excellent time management skills, demonstrated ability to prioritise, work independently, manage and deliver competing tasks to a high standard.
11. Experience in and ability to identify and implement continuous improvement and efficiencies.

Desirable:

1. Knowledge of the higher education sector
2. Knowledge of large financial planning tools such as Workday, Adaptive Planning.
3. Knowledge and experience in business intelligence tools such as MicroStrategy.

When appointing the applicant for this role, in addition to the above, the following attitudes and behaviours will be considered. This section does not need to be addressed when responding to selection criteria.

- Growth mindset, strong desire to learn and improve
- Respect for others and acceptance of diversity
- Desire to be part of a high performing team and willingness to collaborate with others
- Positive and solution orientated who leads by example. Not being content with the status quo.

Other job-related information:

- The role may require occasional work outside of normal business hours

EQUAL OPPORTUNITY, DIVERSITY AND INCLUSION

The University is an equal opportunity employer and is committed to providing a workplace free from all forms of unlawful discrimination, harassment, bullying, vilification and victimisation. The University makes decisions on employment, promotion, and reward on the basis of merit.

The University is committed to all aspects of equal opportunity, diversity and inclusion in the workplace and to providing all staff, students, contractors, honorary appointees, volunteers and visitors with a safe, respectful and rewarding environment free from all forms of unlawful discrimination, harassment, vilification and victimisation. This commitment is set out in the Advancing Melbourne strategy that addresses diversity and inclusion, equal employment opportunity, discrimination, sexual harassment, bullying and appropriate workplace behaviour. All staff are required to comply with all University policies.

The University values diversity because we recognise that the differences in our people's age, race, ethnicity, culture, gender, nationality, sexual orientation, physical ability and background bring richness to our work environment. Consequently, the People Strategy sets out the strategic aim to drive diversity and inclusion across the University to create an environment where the compounding benefits of a diverse workforce are recognised as vital in our continuous desire to strive for excellence and reach the targets of Advancing Melbourne.

OCCUPATIONAL HEALTH AND SAFETY (OHS)

All staff are required to take reasonable care for their own health and safety and that of other personnel who may be affected by their conduct.

OHS responsibilities applicable to positions are published at:

<https://safety.unimelb.edu.au/people/community/responsibilities-of-personnel>

These include general staff responsibilities and those additional responsibilities that apply for Managers and Supervisors and other Personnel.