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| **Cluster** | **Planning ,Housing and Infrastructure** |
| **Agency** | **Department of Planning Housing and Infrastructure** |
| **Division/Branch/Unit** | **Corporate Services / Cluster Finance** |
| **Role ID** | **50030042** |
| **Classification/Grade/Band** | **Clerk Grade 7/8** |
| **ANZSCO Code** | **221111** |
| **PCAT Code** | **1553492** |
| **Date of Approval** | **April 2020 (updated February 2023, library May 2023; October 2024)** |
| **Agency Website** | **https://www.nsw.gov.au/departments-and-agencies/department-of-planning-housing-and-infrastructure** |

Agency overview

Our vision is to create thriving environments, communities and economies for the people of New South Wales. We focus on some of the biggest issues facing our state. We deliver sustainable water resource and environment management, secure our energy supply, oversee our planning system, maximise community benefit from government land and property, and create the conditions for a prosperous state. We strive to be a high-performing, world-class public service organisation that celebrates and reflects the full diversity of the community we serve and seeks to embed Aboriginal cultural awareness and knowledge throughout the department.

Primary purpose of the role

This role is responsible for providing advice and analysis to support decision making, budget analysis, performance and finance management as an internal expert for the Treasury Prime system, Including; financial reporting, assisting in the continual review of the Department’s accounting policies and procedures to ensure compliance with the Australian Accounting Standards and NSW Treasury policies and other relevant statutory requirements.

# Key accountabilities

* Prepare and submit agency monthly data to NSW Treasury using the Prime system to meet legislative and operational requirements.
* Provide accurate and timely advice to network agencies on Prime delivery and implementation to deliver improved efficiencies for the network.
* Provide centralized services on monthly data submission in Prime for network agencies.
* Act as a portfolio advisor on Prime system and processes in particular providing guidance and advice during budget time to senior management, Business Advisors and Finance team members.
* Provide timely, high level support to the Director of Budget Funding Optimisation, Manager Sector reporting and Business Advisors with budget preparation, reporting, including month end and program reporting and full year projections
* Provide support in the preparation of advice and analysis on prioritisation and funding for new proposals, major capital projects and contribute to portfolio wide financial management improvement initiatives
* Apply strong analytical skills to support the Business Advisors and their respective areas and prepare recommendations to increase efficiencies and achieve strategic objectives
* Actively participate in improving the NSW Department of Planning, Housing and Infrastructure commercial acumen by advising non-finance personnel on diverse finance issues.

Key challenges

* Developing and maintaining effective working relationships with business clients and stakeholders and facilitating their optimal engagement
* Maintaining a detailed and current knowledge of management accounting, budgeting procedures and methodologies and communicating these to a wide range of stakeholders with differing levels of financial / commercial knowledge and acumen
* Participating in the development of management reporting systems and accounting methods to improve existing procedures and communication of management information.

Key relationships

| Who | Why |
| --- | --- |
| **Internal** |  |
| Director, Budget Funding Optimisation  Manager, Sector reporting | * Support Director Financial Planning and Performance and Manager providing advice and information * Receive guidance and direction, exchange information and provide advice. * Escalate issues as required. |
| Team members, Business Advisors and Finance staff | * Proactively participate in the development of planning, analysis and financial capabilities * Exchange information, discuss issues and collaborate on cross group projects. |
| Internal clients | * Provide information and advice, consult and collaborate on specific projects and receive feedback. |
| **External** |  |
| NSW Treasury | * Provide and seek information and advice and respond to inquiries. |
| Other Stakeholders | * Provide information and advice as required. |

# Role dimensions

## Decision making

The Financial Analyst is expected to operate with some degree of autonomy in respect to their day to day work priorities, determine matters that need to be referred to senior managers or other staff and provide advice whilst exercising discretion and judgement on what is appropriate to send to senior officers.

## Reporting line

Manager, Sector reporting

## Direct reports

Nil

## Budget/Expenditure

Nil

Essential requirements

* Degree Qualification in Commerce / Business or currently completing a Degree Qualification in Commerce / Business or extensive relevant practical experience

# Capabilities for the role

The [NSW public sector capability framework](https://www.psc.nsw.gov.au/workforce-management/capability-framework/the-capability-framework) describes the capabilities (knowledge, skills and abilities) needed to perform a role. There are four main groups of capabilities: personal attributes, relationships, results and business enablers, with a fifth people management group of capabilities for roles with managerial responsibilities. These groups, combined with capabilities drawn from occupation-specific capability sets where relevant, work together to provide an understanding of the capabilities needed for the role.

The capabilities are separated into **focus capabilities** and **complementary capabilities**.

# Focus capabilities

*Focus capabilities* are the capabilities considered the most important for effective performance of the role. These capabilities will be assessed at recruitment.

The focus capabilities for this role are shown below with a brief explanation of what each capability covers and the indicators describing the types of behaviours expected at each level.

| **Capability group/sets** | **Capability name** |  | **Behavioural indicators** | **Level** |
| --- | --- | --- | --- | --- |
| A yellow sign with a person icon  Description automatically generated | **Act with Integrity**  Be ethical and professional, and uphold and promote the public sector values | | Represent the organisation in an honest, ethical and professional way  Support a culture of integrity and professionalism  Understand and help others to recognise their obligations to comply with legislation, policies, guidelines and codes of conduct  Recognise and report misconduct and illegal and inappropriate behaviour  Report and manage apparent conflicts of interest and encourage others to do so | Intermediate |
| A black and white symbol with arrows  Description automatically generated with medium confidence | **Communicate Effectively**  Communicate clearly, actively listen to others, and respond with understanding and respect | | Focus on providing a positive customer experience  Support a customer-focused culture in the organisation  Demonstrate a thorough knowledge of the services provided and relay this knowledge to customers  Identify and respond quickly to customer needs  Consider customer service requirements and develop solutions to meet needs  Resolve complex customer issues and needs  Cooperate across work areas to improve outcomes for customers | Intermediate |
| A black and white symbol with arrows  Description automatically generated with medium confidence | **Commit to Customer Service**  Provide customer-focused services in line with public sector and organisational objectives | | * Focus on providing a positive customer experience * Support a customer-focused culture in the organisation * Demonstrate a thorough knowledge of the services provided and relay this knowledge to customers * Identify and respond quickly to customer needs * Consider customer service requirements and develop solutions to meet needs * Resolve complex customer issues and needs * Cooperate across work areas to improve outcomes for customers | Intermediate |
| A check mark in a square  Description automatically generated | **Deliver Results**  Achieve results through the efficient use of resources and a commitment to quality outcomes | | Seek and apply specialist advice when required  Complete work tasks within set budgets, timeframes and standards  Take the initiative to progress and deliver own work and that of the team or unit  Contribute to allocating responsibilities and resources to ensure the team or unit achieves goals  Identify any barriers to achieving results and resolve these where possible  Proactively change or adjust plans when needed | Intermediate |
| A check mark in a square  Description automatically generated | **Think and Solve Problems**  Think, analyse and consider the broader context to develop practical solutions | | Identify the facts and type of data needed to understand a problem or explore an opportunity  Research and analyse information to make recommendations based on relevant evidence  Identify issues that may hinder the completion of tasks and find appropriate solutions  Be willing to seek input from others and share own ideas to achieve best outcomes  Generate ideas and identify ways to improve systems and processes to meet user needs | Intermediate |
| A check mark in a square  Description automatically generated | **Demonstrate Accountability**  Be proactive and responsible for own actions, and adhere to legislation, policy and guidelines | | Be proactive in taking responsibility and being accountable for own actions  Understand delegations and act within authority levels  Identify and follow safe work practices, and be vigilant about own and others’ application of these practices  Be aware of risks and act on or escalate risks, as appropriate  Use financial and other resources responsibly | Intermediate |
| A purple square with black gears  Description automatically generated | **Finance**  Understand and apply financial processes to achieve value for money and minimise financial risk | | Understand core financial terminology, policies and processes, and display knowledge of relevant recurrent and capital financial measures  Understand the impacts of funding allocations on business planning and budgets  Identify discrepancies or variances in financial and budget reports, and take corrective action  Know when to seek specialist advice and support and establish the relevant relationships  Make decisions and prepare business cases, paying due regard to financial considerations | Adept |

**Occupation specific focus capabilities**

| **Capability group/sets** | **Category and Sub-category** | | **Level** |
| --- | --- | --- | --- |
| A blue square with white dollar sign  Description automatically generated | **Financial Accounting and Statutory Reporting**  Apply and comply with accounting standards, legislation and specific organisational policies, standards and protocols, and implement effective statutory and other external reporting requirements | * Interpret relevance of legislation3 (e.g. PF&A Act), accounting policy and guidelines applicable to own responsibilities * Define data validation and verification standards to be applied to preparation and approval of reconciliations * Implement accepted compliance requirements and prepare necessary financial statements, information and schedules required by regulatory agencies * Prepare and explain standard financial statements, variance reports, treasury and other specialised reports accurately and efficiently * Provide financial accounting advice to support the accuracy of data upon which management decision making depends | **Level 2** |

# Complementary capabilities

*Complementary capabilities* are also identified from the Capability Framework and relevant occupation-specific capability sets. They are important to identifying performance required for the role and development opportunities.

Note: capabilities listed as ‘not essential’ for this role are not relevant for recruitment purposes however may be relevant for future career development.

| **Capability group/sets** | **Capability name** |  | **Description** | **Level** |
| --- | --- | --- | --- | --- |
| A yellow sign with a person icon  Description automatically generated | Display Resilience and Courage | | Be open and honest, prepared to express your views, and willing to accept and commit to change | Intermediate |
| A yellow sign with a person icon  Description automatically generated | Manage Self | | Show drive and motivation, an ability to self-reflect and a commitment to learning | Intermediate |
| A yellow sign with a person icon  Description automatically generated | Value Diversity and Inclusion | | Demonstrate inclusive behaviour and show respect for diverse backgrounds, experiences and perspectives | Intermediate |
| A black and white symbol with arrows  Description automatically generated with medium confidence | Work Collaboratively | | Collaborate with others and value their contribution | Intermediate |
| A black and white symbol with arrows  Description automatically generated with medium confidence | Influence and Negotiate | | Gain consensus and commitment from others, and resolve issues and conflicts | Intermediate |
| A check mark in a square  Description automatically generated | Plan and Prioritise | | Plan to achieve priority outcomes and respond flexibly to changing circumstances | Intermediate |
| A purple square with black gears  Description automatically generated | Technology | | Understand and use available technologies to maximise efficiencies and effectiveness | Intermediate |
| A purple square with black gears  Description automatically generated | Procurement and Contract Management | | Understand and apply procurement processes to ensure effective purchasing and contract performance | Foundational |
| A purple square with black gears  Description automatically generated | Project Management | | Understand and apply effective project planning, coordination and control methods | Foundational |