

POSITION DETAILS

Title of Position:	Financial Planning Analyst
Reports to:	Team Leader Budgets and Reporting
Section:	Finance and Infrastructure
Team:	School Finance
Number of Direct Reports:	Nil
Classification:	Level E5

BROAD PURPOSE

Catholic Education South Australia (CESA) has embarked on a significant period of innovation and change to respond to opportunities emanating from the South Australia Commission for Catholic Schools (SACCS) strategy, Towards 2027: Expanding Horizons and Deepening Practices.

Catholic schools and the Catholic Education Office (CEO) work in partnership with families, children, and young people to give life to the Living, Learning, Leading Framework and to successfully position CESA as the leading education system and an employer of choice.

POSITION OVERVIEW

The Financial Planning Analyst is responsible for analysing and reporting the financial viability of all schools and the wider CESA system to support strategic objectives. This role is responsible for undertaking detailed analysis of financial information and the assessment of the financial performance of schools and CESA overall.

The Financial Planning Analyst will also design and implement appropriate reports for a variety of stakeholders which illustrate the financial performance of schools. The role will also provide advice on how to mitigate any risks or capitalise on opportunities. In addition, the Financial Planning Analyst is responsible for the identification and implementation of improvements in all aspects of the budgeting and financial planning process, including, systems, tools and business processes.

SIGNIFICANT WORKING RELATIONSHIPS

- Director – Finance & Infrastructure
- Senior Manager School Finance
- School Personnel – Principals, Business Managers and Finance Officers.
- CEO Office Finance Staff
- School Performance Leaders
- CEO Staff

KEY RESPONSIBILITIES

OPERATIONAL & TECHNICAL

- Design, implement and present detailed analysis of the financial sustainability of schools and the wider CESA system, including monitoring against KPIs/benchmarks.
- Support schools with the budget process to ensure that budgets are complete and reflect the appropriate budget assumptions, including future infrastructure requirements.
- Develop and undertake modelling (financial and non-financial) to assess the financial viability of various business proposals and strategic priorities.
- Analyse financial performance and identify potential corrective actions for consideration by management.

- Undertake the consolidation and analysis of annual budgets and long-term plans to support the prioritisation of capital investment and associated funding requirements.
- Identify and implement improvements to financial planning processes, systems and tools that continue to support and add value to the financial management practices of school and the CESA.
- Support the Budget and Reporting system to ensure that it continues to meet the requirements of the school and CESA Finance, including identifying system enhancements, assisting IT with system and user acceptance testing, software releases and fixes to address specific support related issues.
- Ensure that all manuals, guidance, processes and tools are up to date and accessible to schools.
- Other tasks as required by the Director Finance and Infrastructure.

BEHAVIOURAL

- A commitment to the Catholic ethos and to the mission and values of the Catholic Education Office.
- Proven ability to communicate effectively, both written and verbally.
- Ability to work within a team to generate positive work cultures and excellent outcomes.
- Ability to relate engagingly, sensitively, respectfully and positively with others, at all levels of seniority within a school and office environment.
- A high degree of professional competence, integrity, credibility and confidentiality.
- Capacity to manage multiple competing priorities smoothly and thoroughly.
- Sound administrative and operational implementation skills.
- Capacity to deliver solutions with a flexible and adaptive approach to tasks.
- Ability to promote the application of continuous improvement principles to the work, activities, systems, processes and procedures employed by the CEO.

SELECTION CRITERIA

QUALIFICATIONS:

- Qualification in Accountancy
- Bachelor Degree in Accounting, Finance or similar.
- CPA or CA member

KNOWLEDGE, SKILLS & EXPERIENCE

Essential

- A sound understanding and experience of key financial planning processes, including budgeting, reporting and financial viability assessments.
- Experience in management accounting or financial analysis roles.
- Experience in preparing, analysing and communicating financial information.
- Experience working in a service-delivery team environment.

Desirable

- Experience working with budgeting and reporting systems.
- Experience working in the education sector.

OTHER CONDITIONS

- Support CESA's Values:
 - *Openness to God's Spirit at work in our midst and living in Catholic faith.*

- *Respect for the dignity of each person*
- *Commitment to processes of learning that's formative, challenging, engaging, life-long & life-wide.*
- *Inclusivity of those at the edges*
- *Sensitivity, justice, and compassion*
- CESA is committed to ensuring the safety, wellbeing and dignity of children and young people by complying with the National Catholic Safeguarding Standards. Good charter screening and safeguarding training requirements apply to all positions. Among other things, you are required to maintain:
 - Appropriate clearances including a valid Working with Children Check (WWCC) clearance, a Catholic Clearance and Clearance through the Catholic Education Office e-screening process.
 - Current certification in Responding to Risk of Harm, Abuse and Neglect in Education & Care Settings.
 - Undertake induction and ongoing training as directed.
- Always act in accordance with the CESA Code of Conduct and the Charter for Staff in Catholic Schools in South Australia.
- Comply with the Work Health & Safety management system and, as a worker, while at work, take reasonable care for their own health and safety.
 - Take reasonable care that actions or omissions do not adversely affect the health and safety of others.
 - Comply, in so far as they are reasonably able, with any reasonable instruction given by the employer.
 - Co-operate with any reasonable policy or procedure of the employer that is related to health and safety at the workplace.

NOTE: Copies of the above listed qualifications/licences/certificates are required as evidence on appointment.