

Position Title:	Finance Partner
Operations Function:	Finance and Commercial
Reports to:	Financial Controller
Last review date:	May 2023

He huanui oranga mo ngā mokopuna whakatipuranga roto i ngā hapori heke iho, heke iho -
Setting the path of wellness in our communities for the early years, for generations to come.

Whānau Āwhina Plunket – who we are and what we are about

Whānau Āwhina Plunket is a charity organisation and the largest service supporting the health and wellbeing of tamariki under-five and their whānau in Aotearoa. We're proud to visit over 80% of all newborn babies in Aotearoa and to support pēpē, tamariki and their whānau.

We aim to be a cohesive and effective national organisation grounded in evidence and best practice, with the needs of New Zealand whānau and families at the centre of everything we do.

Our Whānau Āwhina Plunket Goals are:

Pae Ora: Healthy Futures:

- **Mauri Ora:** Healthy babies and children
- **Whānau Ora:** Healthy confident families
- **Wai Ora:** Healthy environments and connected communities

We are on a pro-equity journey where we strive to give life to Te Tiriti o Waitangi principles of Tino Rangatiratanga, partnership, active protection, equity and options in our mahi/work to ensure healthy tamariki, confident whānau and connected communities.

Whānau Āwhina Plunket Values

In this role you will be expected to operate in a way that embodies and demonstrates Whānau Āwhina Plunket values as follows:

- **Māia** – to be courageous and lean into discomfort and challenge as we walk the path of pro-equity
- **Tūhono** – to connect and stand in relationship in calm and safe spaces (āhuru Mōwai)
- **Manaaki** – to care, love, nurture, support and mana enhancing. Respects mana atua, mana tīpuna, mana whenua, mana tangata
- **Māhaki** – to be humble as we share our knowledge experience to understand and learn from each other and foster trust

Overview of the Finance team

Our functional teams at Whānau Āwhina Plunket's Support Office contribute to achieving this strategy by providing customer-centric services, which help Whānau Āwhina Plunket to: better understand and measure its performance; strengthen stakeholder relationships; secure and diversify revenue sources; manage and leverage its resources; collect and use information to inform decisions; and to attract, develop and retain our paid and unpaid people.

Our Finance & Commercial function (F&C) provides valued advice, information and insights to help our customers maximise the value from Whānau Āwhina Plunket's assets; provide safe, healthy work environments; and ensure a sustainable financial future for Whānau Āwhina Plunket. We do this by:

- providing assurance around the safe and appropriate use of our assets and resources;
- helping our leaders make important decisions with confidence and credibility; and
- supporting Plunket to get the best value out of our assets and investments.

Purpose of the Position

The Finance team provide insightful financial data, information, systems & processes to enable and protect financial sustainability.

The Finance Partner role is to drive financial performance across Whānau Āwhina Plunket through the delivery of insightful, simple, standardised reporting and business partnering as well as through the delivery of customer focused finance training across all levels of the organisation.

Dimensions of the position

Responsible to: Financial Controller

Responsible for: Nil reports

Delegations: The position's full delegations are set out in the Schedule of Delegations and may be amended from time to time.

Functional relationships: *To follow are the main positions that this role will coordinate with; they are not meant or intended to be exhaustive, exclusive or limiting:*

Internal:

- Business Unit Leadership Teams
- Budget Holders in your Region
- Managers and staff across the Finance & Commercial Team
- Managers and staff, as appropriate, in all Whānau Āwhina Plunket Business Units/teams

External:

- Funders

Key accountabilities

Business as Usual

- Provide high quality financial information, analysis and insight that supports effective decision making across the organisation
- Support the management of financial resources across the organisation, to ensure efficiency, high performance and overall value for money
- Support the budgeting process with business units, and ensure that business units budgets are robust, sustainable and affordable and delivered in accordance with agreed timeframes
- Support senior management through one on one support to achieve financial targets
- Support managers and community staff through effective training to lift the standard of financial literacy across the organisation.
- Provide a very high level of focus on simplification across the finance function
- Work collaboratively with the other Finance partners and drive consistency across all Regions in Plunket

Leadership

- Participate as F&C representative on working groups and projects as appropriate
- Work across the F&C team, contributing to the team goals and assisting others to meet the team's goals
- Demonstrate organisational leadership by being a positive agent of change, actively embracing One Plunket principles and role modelling the desired culture and ways of working

Relationship Management

- Able to have difficult conversations, and challenging thinking and behaviours in a respectful manner so as to get the right outcome for the organisation, while also maintaining the relationship
- Partner with other members of F&C team to ensure frameworks, policies and tools are seamlessly integrated into other key processes
- Partner with Finance and business managers to support business planning and budgeting processes.
- Build and maintain a wide range of connections, both internal and external, and looks for opportunities to facilitate connections between others
- Quickly establish credibility and working relationships to be an effective coach of managers
- Work as an active member of cross functional teams to bring their expertise and experience to organisational problems, and thus develop long term solutions that are outcomes focused.
- Seek feedback about the service they provide and self-reflect on ways to improve

Health & Safety

- Manages own personal health and safety, and takes appropriate action to deal with workplace hazards, accidents and incidents
- Ensures own and others' safety at all times and observes health and safety practices in all workplace activities
- Understands the responsibility individuals and their manager play in health and safety; training is up-to-date and can demonstrate actions in an emergency situation that are specific to the workplace and are designed to keep individual safe
- Complies with relevant safety legislation, policies, procedures, safe systems of work and event reporting
- Identifies and reports all incidents, accidents, and near misses in accordance with policy

Position Description and Scope of Duties

The job holder is expected to perform such other duties as can reasonably be expected, and such other duties reasonably within their experience and capabilities as may be from time to time assigned following consultation.

Person Specification

Experience, knowledge and skills (including Technical Competencies)

Qualifications:

- Qualified Accountant and a member of a recognised Accounting Body
- Relevant tertiary qualification in Commerce/Business, majoring in Accounting or equivalent experience

Skills & experience

- At least 5 years' experience in Management Accounting or similar role
- Ability to quickly establish credibility, have the personal impact and build excellent working relationships with a wide range of diverse stakeholders
- Outward looking and future focused
- Able to identify and implement business improvements that raise business performance
- Ability to make decisions in context of broader finance and business objectives
- High degree of resilience and self-management
- Has a high level of drive to simplify and standardise processes across the organisation

Competencies

ACE-Ability

Whānau Āwhina Plunket's behavioural competency model is made up of three dimensions of personal behaviour - Connection to Plunket, Adaptability and Emotional Maturity.

Adaptability

Thinking

- Is comfortable with complexity - understands alternative worldviews
- Can see beyond face value to identify new, sustainable opportunities
- Keeps perspective and is pragmatic and solutions focused
- Able to accept and work with ambiguity and change

Interpersonal

- Is committed and capable of expanding professional/social networks
- Is strong enough to confront and deal with difficult people/issues
- A self-starter who can support and motivate key managers and staff

Connection to Whānau Āwhina Plunket's Direction

- Has a high level of energy and commitment to achieving Plunket's vision
- Has a broad range of engagement
- Is committed to adapting and improving their own practice
- Is committed to growing the business and developing relationships

Emotional Maturity

- Is non-reactive and objective and maintains a high level of integrity
- Understands the degree of influence in their role
- Understands own limitations

I have read and understood the above position description and accept all the above responsibilities incorporated herein.

Finance Partner

Date

Financial Controller

Date