



## POSITION DESCRIPTION

Position Title:	Finance Partner - Membership and Special Works
Location:	Box Hill
Reporting to:	Senior Finance Partner
Direct Reports:	1

## ORGANISATIONAL CONTEXT

### Our Vision

The St Vincent de Paul Society (**the Society**) aspires to be recognised as a caring Catholic charity offering 'a hand up' to people in need. We do this by respecting their dignity, sharing our hope and encouraging them to take control of their own destiny.

### Our Mission

The Society is a lay Catholic organisation that aspires to live the gospel message by serving Christ in the poor with love, respect, justice, hope and joy, and by working to shape a more just and compassionate society.

### Our Values

- Commitment: Loyalty in service to our mission, vision and values;
- Compassion: Welcoming and serving all with understanding and without judgement;
- Respect: Service to all regardless of creed, ethnic or social background, health, gender, or political opinions;
- Integrity: Promoting, maintaining and adhering to our mission, vision and values;
- Empathy: Establishing relationships based on respect, trust, friendship and perception;
- Advocacy: Working to transform the causes of poverty and challenging the causes of human injustice; and
- Courage: Encouraging spiritual growth, welcoming innovation and giving hope for the future.

## The organisations:

St Vincent de Paul Society Victoria Inc. is the single member of VincentCare Victoria, a company limited by guarantee created in 2003 to focus on the age care services and government funded community services activities of the Society. Within the overall structure are three separate legal entities, each with their own governance structure, but sharing CEO and central offices. The organisations took the decision to co-locate their central offices in 2020. There is also to be a transition to a shared services model (including HR, Finance, IT, Risk and Marketing, Fundraising and Communications) which will provide internal services across the organisations.

## St Vincent de Paul Society Victoria:

The St Vincent de Paul Society Victoria is a well-recognised and highly regarded charitable organisation established in Australia in 1854, which aspires to be recognised as a caring Catholic charity offering 'a hand up' to people in need. It does this by respecting their dignity, sharing hope and encouraging people to take control of their own destiny. Staff, volunteers and members provide practical support, advocacy and friendship to the most vulnerable in our community.

St Vincent de Paul Society Victoria delivers its services through a group structure. At the core is SVdP, primarily funded through its retail network of Vinnies shops and its fundraising activities which delivers material and companionship to those in need through its home visitation, assistance centres, soup vans and a range of education programs.

## VincentCare:

VincentCare provides a range of professional accommodation and support services to people that are facing disadvantage and those that are ageing throughout metropolitan and regional Victoria. The primary focus is to:

- provide quality services for people at risk or experiencing homelessness, people with a disability, and men and women struggling with complex needs including substance abuse and mental health issues
- advocate for vulnerable and disadvantaged people, respect their dignity and rights and understand their needs so as to provide them with support and encouragement and enable greater independence.

## OUR CHILD SAFETY COMMITMENT

St Vincent de Paul Society (the Society) is committed to the safety and wellbeing of all children and young people. Our members, volunteers and employees understand that child safety is everyone's responsibility and is at the centre of all that we do and every decision we make.

We have zero tolerance for child abuse or neglect.

We are committed to providing a child safe environment where children and young people are safe and feel safe, and their voices are heard about decisions that affect them. This includes but is not limited to the cultural safety of Aboriginal & Torres Strait Islander children, children from diverse cultural, linguistic, and/or religious backgrounds, children who identify as lesbian, gay, bisexual, transgender, queer, intersex, asexual (LGBTQIA), and children with a disability.

Whilst all Society programs and activities may not involve regular contact with children by members, volunteers and employees, it is the decision of the Society State Council that all Society programs and activities will be subject to the Child Safety Policy.

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## PURPOSE OF ROLE

The purpose of this newly created **Finance Partner - Membership and Special Works** role, reporting directly to the Senior Finance Partner, is to work closely with the GM's and other Senior Managers to provide advice and support, within the context of shared services.

The role encompasses:

- providing support and training to conference members (particularly treasurers) and Special Works teams, in line with the overall Finance policy and procedure framework and the mission of the Society;
- providing accurate and timely monthly reporting with detailed analytics and commentary with trend analysis;
- owning and driving the forecasting and budgeting process for all Membership (conferences and councils) and Special Works operations, through accurate representation of financial data; and
- Assisting the various stakeholders within the portfolio on day-to-day queries to enable smooth financial operations.

## KEY ACCOUNTABILITIES

Key Accountability	Deliverables
<b>Contribute to the organisational culture</b>	<ul style="list-style-type: none"> <li>• Demonstrate understanding and empathy with the mission and ethos of the St Vincent de Paul Society and ensure the Society's values are incorporated into all aspects of the performance of the role</li> <li>• Respect the Catholic values inherent within the Mission of the organisation and the expression of spirituality and reflective practice in the workplace</li> <li>• Positively contribute to and influence organisational culture</li> <li>• Actively participate in activities that develop your personal and professional skills, knowledge and experience</li> <li>• Regularly attend and actively participate in all team / divisional and organisational meetings</li> <li>• Contribute to developing a culture of continuous improvement and respond positively to change</li> </ul>
<b>Safety</b>	<ul style="list-style-type: none"> <li>• Take reasonable care for your own safety and that of others that may be affected by your actions or lack of actions</li> <li>• Identify and report hazards within 24 hours of them occurring on the incident reporting system</li> <li>• Manage day to day risks in line with policy and procedures</li> </ul>
<b>Finance Partnering &amp; Monthly Reporting</b>	<ul style="list-style-type: none"> <li>• Accountable for the accuracy, integrity and timely delivery of the monthly management accounts for the portfolio, including compliance with general accepted accounting principles, applicable accounting standards, agreements and corporate procedures and policies.</li> <li>• Specifically, for Membership (conferences and councils), ensuring compliance with the Conference Financial Management Framework (CFMF) and Treasurers Handbook</li> </ul>

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	<ul style="list-style-type: none"> <li>• Develop and sustain relationships with conferences treasurers to identify and facilitate improvements in financial management and business processes</li> <li>• Understand the customer's focus and business drivers and be able to interpret the financial decisions and its impact</li> <li>• Collaborate with Financial Operations and other internal stakeholders to understand processes and their impact on the accuracy of the monthly results</li> <li>• Assist Line Manager in completing the various Committee papers.</li> </ul>
<b>Budgeting &amp; Forecasting (Operating &amp; CAPEX)</b>	<ul style="list-style-type: none"> <li>• Accountable for the operating and capital budgeting and forecasting process across the portfolio including: <ul style="list-style-type: none"> <li>• engagement with all budget holders, including conference and council treasurers;</li> <li>• understanding key drivers and impact on budgetary outcomes/options and providing advice and guidance to budget holders</li> <li>• maintenance and on-going development of systems and processes to build budgets to ensure efficient and accurate data capture and budget reporting</li> </ul> </li> <li>• accountable for ensuring the Treasurers Portal is uploaded with the budget and forecast on a timely basis for accurate reporting through structured regular interactions with conference and council treasurers, provide insightful analysis into the financial results and forecasts for the year.</li> </ul>
<b>Training and Support</b>	<ul style="list-style-type: none"> <li>• Take ownership of key Membership and Special Works financial procedures, such as the CFMF and Treasurers Handbook and ensure these documents are kept up-to-date and consistent with broader Society financial policies and procedures.</li> <li>• Provide conference and council treasurers and Special Works stakeholders with regular training (face to face and/or virtual) on key Membership and Special Works financial procedures and systems, such as the Treasurer's portal, ProMaster and any other applicable systems and processes</li> <li>• Organise and lead the "Portal User Group" on a quarterly basis with a view to obtaining feedback for ongoing improvements to provision of information to conferences and councils</li> <li>• Collaborate with Finance Operations to analyse the nature of queries raised by conferences for trends and resolutions.</li> <li>• Collaborate with conference and council treasurers to ensure information is received on a timely basis for timely completion of month end and year end tasks</li> </ul>
<b>Audit and Compliance</b>	<ul style="list-style-type: none"> <li>• Assist Line Manager to resolve audit queries on a timely basis</li> <li>• Ensure all work undertaken within areas of accountability complies with Group values, policies, procedures, codes of conduct and legislative/regulatory requirements and recognised accreditation standards</li> <li>• Undertake appropriate training to support the understanding of, and compliance with, key policies including work health and safety, equal opportunities, privacy, procurement etc., to meet the required compliance obligations</li> <li>• Participate in any periodic reviews of work practices/operating</li> </ul>

Key Accountability	Deliverables
	arrangements within areas of accountability to ensure potential risks/hazards/ breaches are identified and appropriately managed to meet compliance requirements
<b>Projects and Other deliverables</b>	<ul style="list-style-type: none"> <li>Continuously improve the quality of Membership and Special Works financial management and the monthly reporting frameworks through better insights and delivery methods.</li> <li>Lead the project for ongoing improvements to existing systems and processes to enable more efficient delivery of information to stakeholders, including conferences and council treasurers and Membership and Special Works management.</li> <li>Any other tasks as directed by Line Manager.</li> </ul>
<b>Finance Partnering</b>	<ul style="list-style-type: none"> <li>Be an active and supportive partner to Membership and Special Works management, conferences and councils and other stakeholders</li> <li>Build and maintain capability to grow the Finance profile</li> </ul>
<b>People Leadership</b>	<ul style="list-style-type: none"> <li>Act as a role model for good people management practice</li> <li>Ensure the implementation of Group policies and procedures across areas of accountability including:               <ul style="list-style-type: none"> <li>working with team members to develop work plans aligned to the Group's objectives</li> <li>conducting individual performance reviews for direct reports and supporting their learning and development needs</li> <li>ensuring staff attend mandatory training programs</li> <li>monitoring and addressing work health &amp; safety issues in conjunction with the Work Health &amp; Safety Manager</li> </ul> </li> </ul>

## POSITION CONTACTS

Most Frequent Contacts	Internal/ External	Nature or Purpose of Contact
Senior Finance Partner	Internal	<ul style="list-style-type: none"> <li>Line Manager</li> </ul>
Group Financial Controller and Executive GM – Corporate Services	Internal	<ul style="list-style-type: none"> <li>Departmental Head and Executive</li> </ul>
Finance Operations & Process Improvement Lead Senior Financial Accountant	Internal	<ul style="list-style-type: none"> <li>Work in close collaboration as key Finance team members.</li> </ul>

CEO and Executive Team	Internal	<ul style="list-style-type: none"> <li>Provide support services as required</li> </ul>
Senior Managers and other stakeholders	Internal	<ul style="list-style-type: none"> <li>Direction, support and guidance as required</li> </ul>
Conferences, Regional and Central Council Treasurers; and Soup Van Presidents	External	<ul style="list-style-type: none"> <li>Key Stakeholders</li> </ul>
Other support teams	Internal	<ul style="list-style-type: none"> <li>Work with all staff and provide exemplary customer service and pro-active communication</li> </ul>
External Auditors	External	<ul style="list-style-type: none"> <li>Work in collaboration to provide beneficial outcomes to the Society.</li> </ul>

## DELEGATIONS OF AUTHORITY

You will be required to work within the delegations of authority policy.

## KEY REQUIREMENTS

### Qualifications

- Tertiary qualifications in finance or accounting
- Professional membership of CPA Australia or Chartered Accountants Australia & New Zealand to the level of CPA or CA.

### Skills

- Excellent verbal and written communication skills
- Strong interpersonal skills with the ability to communicate and influence at all levels of the business
- Strong analytical skills with the ability to analyse information and solve problems
- Advanced Microsoft Excel and Microsoft Word skills
- Intermediary level skills in other Microsoft Office applications

### Knowledge / Experience

- Proven experience in business partnering, management accounting and reporting preferably in the health/aged care/community services sector, including sound knowledge of Australian Accounting Standards and associated legislation and compliance standards.
- Proven experience in process improvement and demonstrated change management skills
- Preferred experience in Microsoft Dynamics Navision/Business Central, Jet Reporting, SharePoint or equivalent and expense management systems

### Attributes

- Excellent attention to detail
- Ability to proactively manage workload, organise multiple priorities and consistently meet deadlines
- Possess initiative and drive to successfully work in a fast-paced environment



- Ability to undertake travel within the State (Metro/Regional) for meetings and providing training, as and when required

THE LIST OF RESPONSIBILITIES HEREIN IS NOT INTENDED TO BE ALL-INCLUSIVE, AND MAY INCLUDE ADDITIONAL RESPONSIBILITIES AS REQUIRED AND ASSIGNED. IT MAY BECOME NECESSARY TO MODIFY/CHANGE THESE POSITION RESPONSIBILITIES FROM TIME TO TIME.