

# Role Description

## Senior Financial Analyst



Customer  
Service

Cluster	Customer Service
Department/Agency	Department of Customer Service
Division/Branch/Unit	Corporate Services / Finance
Classification/Grade/Band	Clerk Grade 9/10
ANZSCO Code	221111
PCAT Code	1223233
Date of Approval	May 2020

### Primary purpose of the role

Manage financial analysis and reporting services including the delivery of cluster budgets, financial insights, analytics and reports to various internal and external stakeholders to inform decision making and performance.

### Key accountabilities

- Produce reports, visualisations and recommendations to assess performance and answer complex business problems that are presented in the most appropriate format to ensure clarity for target audience
- Provide financial analysis and advice to management on the organisation's financial results and the drivers affecting the financial and budgetary position of the division to inform decision making
- Develop and maintain effective financial management controls to ensure that potential risks to the financial integrity of systems and processes are mitigated
- Manage budgeting, forecasting and submissions to central agencies on behalf of the Organisation on time and to expected standards
- Provide specialist advice, support and training to stakeholders on financial matters and practices in targets to ensure the organisation is compliant and achieves its targets
- Review and analyse documentation, reports and submissions and provide recommendations to support informed decision making
- Undertake financial analysis including the impact on net costs for initiatives and projects for business units financial and commercial viability
- Lead and participate in financial and business reviews to improve and strengthen internal controls around business processes

### Key challenges

- Fostering and encouraging a strong working relationship between the Business and Division given potentially competing interests
- Establishing relationships with stakeholders to develop trust and ensure reliable and accurate information given the limited capacity and likely high volumes of work and customers seeking services
- Keeping up-to-date with changing legislative, financial, technological and business requirements while ensuring the delivery of quality client services in a high-volume working environment

## Key relationships

Who	Why
<b>Internal</b>	
Senior Management	<ul style="list-style-type: none"> <li>• Develop and maintain effective working relationships to help support decision making</li> <li>• Provide high level strategic support and advice on financial management and sustainability</li> </ul>
Manager	<ul style="list-style-type: none"> <li>• Escalate issues, keep informed, advise, receive guidance and instructions</li> <li>• Provide recommendations and inform through reporting any sensitive and emerging issues</li> <li>• Participate in meetings and discussions to share information and provide input and feedback</li> </ul>
Work Team	<ul style="list-style-type: none"> <li>• Foster a strong working relationship with the central team to ensure the success of the out-posted model</li> <li>• Manage compliance with reporting requirements of the central team</li> </ul>
Customer/Stakeholders	<ul style="list-style-type: none"> <li>• Develop and maintain effective working relationships to help support business unit staff</li> <li>• Provide support and customer focused advice on the financial management and sustainability of the Business's operations</li> <li>• Manage the flow of information, seek clarification and provide advice and responses to ensure prompt resolution of issues</li> </ul>
<b>External</b>	
NSW Treasury and other agencies	<ul style="list-style-type: none"> <li>• Develop and maintain effective working relationships to consult and negotiate on the preparation of departmental responses to requests.</li> </ul>

## Role dimensions

### Decision making

This role has autonomy and makes decisions that are under their direct control as directed by their Manager. It refers to a Managers' decisions that require significant change to program outcomes or timeframes or are likely to escalate or require submission to a higher level of management. This role is fully accountable for the delivery of work assignments on time and to expectations in terms of quality, deliverables and outcomes. This role submits reports, business cases and other forms of written advice with minimal input from the manager.

### Reporting line

Manager

### Direct reports

This role has no direct reports

### Budget/Expenditure

As per the Customer Service Delegations

## Key knowledge and experience

- A proven record in accounting and experience in a commercial environment and/or the public sector

## Essential requirements

- Relevant tertiary and professional qualification
- Eligibility for membership of a recognised professional accounting body such as CPA Australia or Institute of Chartered Accountants in Australia.

## Capabilities for the role

The [NSW public sector 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.

FOCUS CAPABILITIES			
Capability group/sets	Capability name	Behavioural indicators	Level
 Personal Attributes	<b>Act with Integrity</b> Be ethical and professional, and uphold and promote the public sector values	<ul style="list-style-type: none"> <li>• Represent the organisation in an honest, ethical and professional way and encourage others to do so</li> <li>• Act professionally and support a culture of integrity</li> <li>• Identify and explain ethical issues and set an example for others to follow</li> <li>• Ensure that others are aware of and understand the legislation and policy framework within which they operate</li> <li>• Act to prevent and report misconduct and illegal and inappropriate behaviour</li> </ul>	Adept
 Relationships	<b>Commit to Customer Service</b> Provide customer-focused services in line with public sector and organisational objectives	<ul style="list-style-type: none"> <li>• Take responsibility for delivering high-quality customer-focused services</li> <li>• Design processes and policies based on the customer's point of view and needs</li> <li>• Understand and measure what is important to customers</li> <li>• Use data and information to monitor and improve customer service delivery</li> </ul>	Adept

- Find opportunities to cooperate with internal and external stakeholders to improve outcomes for customers
- Maintain relationships with key customers in area of expertise
- Connect and collaborate with relevant customers within the community

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**Work Collaboratively**

Collaborate with others and value their contribution

- Recognise outcomes achieved through effective collaboration between teams
- Build cooperation and overcome barriers to information sharing, communication and collaboration across the organisation and across government
- Facilitate opportunities to engage and collaborate with stakeholders to develop joint solutions
- Network extensively across government and organisations to increase collaboration
- Encourage others to use appropriate collaboration approaches and tools, including digital technologies

Advanced

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**Influence and Negotiate**

Gain consensus and commitment from others, and resolve issues and conflicts

- Use facts, knowledge and experience to support recommendations
- Work towards positive and mutually satisfactory outcomes
- Identify and resolve issues in discussion with other staff and stakeholders
- Identify others' concerns and expectations
- Respond constructively to conflict and disagreements and be open to compromise
- Keep discussions focused on the key issues

Intermediate

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**Plan and Prioritise**

Plan to achieve priority outcomes and respond flexibly to changing circumstances

- Consider the future aims and goals of the team, unit and organisation when prioritising own and others' work
- Initiate, prioritise, consult on and develop team and unit goals, strategies and plans
- Anticipate and assess the impact of changes, including government policy and economic conditions, on team and unit objectives and initiate appropriate responses
- Ensure current work plans and activities support and are consistent with organisational change initiatives
- Evaluate outcomes and adjust future plans accordingly

Adept





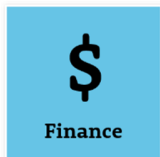
## Finance

Understand and apply financial processes to achieve value for money and minimise financial risk

- Apply a thorough understanding of recurrent and capital financial terminology, policies and processes to planning, forecasting and budget preparation and management
- Identify and analyse trends, review data and evaluate business options to ensure business cases are financially sound
- Assess relative cost benefits of various purchasing options
- Promote the role of sound financial management and its impact on organisational effectiveness
- Obtain specialist financial advice when reviewing and evaluating finance systems and processes
- Respond to financial and risk management audit outcomes, addressing areas of noncompliance in a timely manner

Advanced

## Occupation specific capability set



### Finance Operations and Systems

Ensure appropriateness and reliability of financial information systems, and effective governance, cash management and controls over transactional processes

- Evaluate finance information systems, processes and user operating documentation for reliability, clarity and efficiency
- Provide technical review and reliable advice relating to financial terminology and processes, AAS and NSW Treasury
- Accounting policies and key financial measures
- Devise systems for appropriate financial data collection to comply with statutory and other external filing requirements, and ensure that financial reports are distributed in accordance with policy and business requirements
- Establish and manage general ledger and account management processes and perform financial system checks, testing for compliance with control and related requirements
- Assure the timely and accurate operation of the finance system to capture data and business information Interpret and determine user requirements to assist development of financial systems and processes to satisfy AAS and meet business needs Develop cash forecasting models to support long term cash requirements






Level 3

## 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.

## COMPLEMENTARY CAPABILITIES

Capability group/sets	Capability name	Description	Level
 Personal Attributes	Display Resilience and Courage	Be open and honest, prepared to express your views, and willing to accept and commit to change	Intermediate
	Manage Self	Show drive and motivation, an ability to self-reflect and a commitment to learning	Adept
	Value Diversity and Inclusion	Demonstrate inclusive behaviour and show respect for diverse backgrounds, experiences and perspectives	Intermediate
 Relationships	Communicate Effectively	Communicate clearly, actively listen to others, and respond with understanding and respect	Adept
 Results	Deliver Results	Achieve results through the efficient use of resources and a commitment to quality outcomes	Intermediate
	Think and Solve Problems	Think, analyse and consider the broader context to develop practical solutions	Adept
	Demonstrate Accountability	Be proactive and responsible for own actions, and adhere to legislation, policy and guidelines	Intermediate
 Business Enablers	Technology	Understand and use available technologies to maximise efficiencies and effectiveness	Intermediate
	Procurement and Contract Management	Understand and apply procurement processes to ensure effective purchasing and contract performance	Intermediate
	Project Management	Understand and apply effective project planning, coordination and control methods	Adept
<b>Occupation specific capability set</b>			
 Finance	Finance Business Partnering	Partner with key stakeholders, and provide expert professional advice, coaching and consulting expertise to ensure the effective alignment of financial management strategies and organisational objectives	Level 3