

Role Description

Associate Director, Investment and Performance Analysis



Treasury

Cluster	The Treasury
Agency	NSW Treasury
Division/Branch/Unit	Trade, Tourism, Investment and Precincts
Location	Sydney
Classification/Grade/Band	Clerk Grade 11/12
Role Family (<i>internal use only</i>)	Bespoke/Finance & Economics/Lead
ANZSCO Code	132211
PCAT Code	1119192
Date of Approval	February 2020
Agency Website	www.industry.nsw.gov.au

Agency overview

NSW Treasury leads the economic, jobs and investment conversation across New South Wales (NSW). From its position at the centre of government, Treasury drives the economic development strategy to guide the State's growth for the benefit of the people who live, work and study in NSW. Its work includes boosting trade, investment and tourism, developing industry, supporting jobs growth, improving service delivery to the community and increasing living standards, now and into the future.

Information about the structure and functions of the NSW Treasury can be sourced on our website: <https://www.treasury.nsw.gov.au> (Refer to "About Treasury" and "Our Treasury Team").

Primary purpose of the role

Lead the delivery of business funding products for emergent and mature client organisations. The role analyses investment opportunities develops recommendations for the Director, Executive Director, and Deputy Secretary, and manages the investment approval process to ensure that equity investments are well managed, auditable and transparent.

Key accountabilities

- Lead the budget and forecasts for the Global NSW Strategy, including analysis of proposals, coordination of economic assessments, development of recommendations, financial models, presentations and associated briefing.
- Lead the appraisal of investment opportunities for investment attraction and export development incentives, including financial modelling and data analysis.
- Develop new performance monitoring processes to report outcomes for Global NSW.
- Provide ad hoc financial modelling and analysis to support activities undertaken by the Trade, Tourism, Investments and Precincts Group.
- Provide effective and transparent financial management reporting including monitoring, tracking and reporting on investments to ensure financial transparency and rigor.

- Manage the collation and provision of comprehensive reporting on the GO NSW Equity Fund to support accountability, transparency and external oversight (such as the NSW Audit Office and NSW Treasury).
- Support the Director, Executive Director, and Deputy Secretary, by providing sound advice and recommendations for investments that align with Global NSW Strategy's objectives.
- Identify, analyse and present recommendations to improve existing business processes within the Trade, Tourism, Investment and Precincts Group, with particular focus on the Performance and Products team.
- Attend investment committee meetings, including presentation of analysis and engagement and negotiation with Investment Committee members to ensure that investments meet the Jobs for NSW Fund's criteria for funding.
- Maintain strong relationships with stakeholders, including the Executive of NSW Treasury, to ensure service delivery meets customer expectations.

Key challenges

- Developing a performance reporting framework, undertaking analysis
- Improving the quality of investment appraisals and incentive design, particularly where there is limited existing data
- Developing, modifying and enforcing appropriate program standards, guidelines, procedures or tools to support the delivery of program objectives and maintain appropriate financial governance and rigor.
- Managing relationships within NSW Treasury with discretion, sensitivity and understanding

Key relationships

Who	Why
Internal	
Director and Executive Director, Industry, Jobs and Investment	<ul style="list-style-type: none"> • Strategy development for equity funding opportunities, governance and risk issues, and analysis of potential client companies • Advise on the Jobs for NSW Fund's funding and performance, and investment pipeline. • Present recommendations for GO NSW investment.
Managers and Directors within Trade, Tourism, Investment and Precincts	<ul style="list-style-type: none"> • Collaborating closely on strategy development, financial analysis, business planning, submission of briefs and advice, and management of significant projects and/or issues
External	
Treasury	<ul style="list-style-type: none"> • Reporting on the management and allocation of funds and debt instruments to business and industry recipients
Rural Assistance Authority (RAA) Orange	<ul style="list-style-type: none"> • Reporting and managing the drawdown of investments and overseeing the management of all reconciliations and administrative requirements as appropriate

Role dimensions

Decision making

- Reviews incentive initiatives, determines strategic fit and investment viability, and manages economic assessment and approval processes.
- Determines administrative, governance, risk and reporting activities to assess and track investment recipients.
- Determine appropriate monetary reporting

Reporting line

Director, Performance and Products

Direct reports

1-3

Budget/Expenditure







N/A

Capabilities for the role

The NSW Public Sector Capability Framework applies to all NSW public sector employees. The Capability Framework is available at www.psc.nsw.gov.au/capabilityframework

Capability summary

Below is the full list of capabilities and the level required for this role. The capabilities in bold are the focus capabilities for this role. Refer to the next section for further information about the focus capabilities.

NSW Public Sector Capability Framework		
Capability Group	Capability Name	Level
 Personal Attributes	Display Resilience and Courage	Advanced
	Act with Integrity	Adept
	Manage Self	Advanced
	Value Diversity	Adept
 Relationships	Communicate Effectively	Adept
	Commit to Customer Service	Adept
	Work Collaboratively	Advanced
	Influence and Negotiate	Advanced
 Results	Deliver Results	Adept
	Plan and Prioritise	Adept
	Think and Solve Problems	Advanced
	Demonstrate Accountability	Adept
 Business Enablers	Finance	Advanced
	Technology	Intermediate
	Procurement and Contract Management	Intermediate
	Project Management	Adept
 People Management	Manage and Develop People	Adept
	Inspire Direction and Purpose	Adept
	Optimise Business Outcomes	Adept
	Manage Reform and Change	Adept
Finance Professionals Capability Set		
Capability Group	Capability Name	Level
 Finance	Financial Strategy, Governance and Risk Management	Level 4
	Finance Business Partnering	Level 4

Focus capabilities

The focus capabilities for the role are the capabilities in which occupants must demonstrate immediate competence. The behavioural indicators provide examples of the types of behaviours that would be expected at that level and should be reviewed in conjunction with the role's key accountabilities.

NSW Public Sector Capability Framework		
Group and Capability	Level	Behavioural Indicators
Personal Attributes Act with Integrity	Adept	<ul style="list-style-type: none"> • Represent the organisation in an honest, ethical and professional way and encourage others to do so • Demonstrate professionalism to support a culture of integrity within the team/unit • Set an example for others to follow and identify and explain ethical issues • Ensure that others understand the legislation and policy framework within which they operate • Act to prevent and report misconduct, illegal and inappropriate behaviour
Relationships Commit to Customer Service	Advanced	<ul style="list-style-type: none"> • Take responsibility for delivering high quality customer-focussed services • Understand customer perspectives and ensure responsiveness to their needs • Identify customer service needs and implement solutions • Find opportunities to co-operate with internal and external parties to improve outcomes for customers • Maintain relationships with key customers in area of expertise • Connect and collaborate with relevant stakeholders within the community
Relationships Work Collaboratively	Adept	<ul style="list-style-type: none"> • Encourage a culture of recognising the value of collaboration • Build co-operation and overcome barriers to information sharing and communication across teams/units • Share lessons learned across teams/units • Identify opportunities to work collaboratively with other teams/units to solve issues and develop better processes and approaches to work
Results Think and Solve Problems	Advanced	<ul style="list-style-type: none"> • Undertake objective, critical analysis to draw accurate conclusions that recognise and manage contextual issues • Work through issues, weigh up alternatives and identify the most effective solutions • Take account of the wider business context when considering options to resolve issues • Explore a range of possibilities and creative alternatives to contribute to systems, process and business improvements • Implement systems and processes that underpin high quality research and analysis
Results Demonstrate Accountability	Adept	<ul style="list-style-type: none"> • Assess work outcomes and identify and share learnings to inform future actions • Ensure that actions of self and others are focused on achieving organisational outcomes • Exercise delegations responsibly

NSW Public Sector Capability Framework

Group and Capability	Level	Behavioural Indicators
		<ul style="list-style-type: none"> Understand and apply high standards of financial probity with public monies and other resources Identify and implement safe work practices, taking a systematic risk management approach to ensure health and safety of self and others Conduct and report on quality control audits Identify risks to successful achievement of goals, and take appropriate steps to mitigate those risks
Business Enablers Finance	Advanced	<ul style="list-style-type: none"> 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 direct provision or purchase of services Understand and promote the role of sound financial management and its impact on organisational effectiveness Involve specialist financial advice in review and evaluation of systems and processes used to identify opportunities for improvement Respond to financial and risk management audit outcomes, addressing areas of non-compliance
Business Enablers Project Management	Adept	<ul style="list-style-type: none"> Prepare clear project proposals and define scope and goals in measurable terms Establish performance outcomes and measures for key project goals, and define monitoring, reporting and communication requirements Prepare accurate estimates of costs and resources required for more complex projects Communicate the project strategy and its expected benefits to others Monitor the completion of project milestones against goals and initiate amendments where necessary Evaluate progress and identify improvements to inform future projects
People Management Manage and Develop People	Adept	<ul style="list-style-type: none"> Define and clearly communicate roles and responsibilities to achieve team/unit outcome Negotiate clear performance standards and monitor progress Develop team/unit plans that take into account team capability, strengths and opportunities for development Provide regular constructive feedback to build on strengths and achieve results Address and resolve team and individual performance issues, including unsatisfactory performance in a timely and effective way Monitor and report on performance of team in line with established performance development frameworks
People Management Inspire Direction and Purpose	Adept	<ul style="list-style-type: none"> Promote a sense of purpose and enable others to understand the links between government policy and organisational goals Build a shared sense of direction, clarify priorities and goals and inspire others to achieve them

NSW Public Sector Capability Framework

Group and Capability	Level	Behavioural Indicators
		<ul style="list-style-type: none"> • Work with others to translate strategic direction into operational goals and build a shared understanding of the link to core business outcomes • Create opportunities for recognising and celebrating high performance at the individual and team level • Work to remove barriers to achievement of goals

Finance Professionals Capability Set

Group and Capability	Level	Behavioural Indicators
Finance Financial Strategy, Governance and Risk Management	Level 4	<ul style="list-style-type: none"> • Advise business management on the most appropriate finance sourcing strategies to meet strategic organisational goals • Design evaluation protocols, benchmarking standards and key measures to monitor the performance of specific programs and selected financial strategies • Design and implement governance frameworks and financial management structures and systems, understanding the requirements of diverse organisations • Implement financial policies and effective financial control mechanisms, and ensure that these are clearly understood by finance staff across the organisation • Test the validity and value of financial policies, implementing changes which deliver the most effective outcomes for stakeholders • Design and implement the organisation's financial planning process
Finance Finance Business Partnering	Level 4	<ul style="list-style-type: none"> • Identify or broker the most appropriate funding solutions or services to respond to and support new or ongoing business initiatives • Partner with senior management to determine the underlying financial strength of the organisation and to decide how to remedy deficiencies and mitigate financial risks • Consult and advise business leaders around the achievement of the best return on investment for programs and initiatives, to deliver on business needs and objectives • Reinforce a high level of understanding and appreciation of the successful alignment of business practices with government financial management requirements and the need for early intervention when corrective actions are needed • Apply thorough understanding of government financial management legislation and regulation and Treasury accounting policies • Collaborate with business managers ensuring that appropriate expert financial advice and guidance add value to decision making or responses to issues or events • Implement appropriate professional networking within and outside of the sector to benchmark practices and solutions which improve business performance