

ABN 97 470 256 857

## Position Description

**POSITION TITLE:** Data and Finance Leader

**ACCOUNTABLE TO:** CEO Extended Families Australia

**PERIOD OF APPOINTMENT:** This is a permanent position subject to a 3-month probationary period.

**HOURS OF EMPLOYMENT:** 15 hours a week (negotiable) – may be worked over 2 or 3 days a week.

Extended Families aims to provide a flexible family-friendly environment for staff. Actual start and finish times are flexible and can be negotiated.

### ORGANISATIONAL CONTEXT:

Extended Families Australia facilitates positive connections between people within a community to provide support to children and young people with disabilities and their families. Extended Families seeks to widen social networks, empower individuals, promote inclusion and strengthen the bonds people have within their local area. The organisation breaks down barriers by changing social attitudes and creating opportunities.

Children and families who are supported by Extended Families have access to a number of flexible support options including individualised volunteer or support worker matching for social, recreational and respite support, support coordination, supported play groups, friendship groups and a range of recreational activities and groups.

With the transition to the National Disability Insurance Scheme (NDIS), Extended Families has expanded its range of services. The related data management and financial resourcing needs have also expanded.

### ORGANISATIONAL RELATIONSHIPS:

**Reports to:** Directly reports to the CEO of Extended Families.

**Direct Reports:** Currently Nil.

**Internal Relationships:** The position will work closely with CEO, Finance Manager, Regional Managers and other finance and administrative staff

**External Relationships:** The position will liaise with the NDIA and Plan Management organisations where required to resolve payment / claim issues.

**Located:** 1 / 95 Bell St Coburg, with some work as required at 27 Bank St Box Hill.

## **PRINCIPAL ROLES AND ACCOUNTABILITIES:**

The Data and Finance Leader helps the organisation run smoothly and intelligently, based on accurate information and projections.

The role is responsible for providing a range of data reports to inform organisational operation, planning and development. The position is also responsible for the development and overseeing of NDIS Service Agreements, undertaking accurate NDIS claims and resolving claim issues.

The position will work as part of a team to achieve the strategic goals of the organisation.

## **DUTIES AND RESPONSIBILITIES:**

### **IT**

- Ensure optimum use of the organisations CRM, based on Salesforce; regularly run reports and data extracts and manage updates.
- Support staff with understanding and operating the CRM and technology generally, and ensure the resolution of issues.
- Assist with the planning and purchase of IT and technology assets.

### **Data**

- Develop data reports and enquires in the CRM.
- Regularly run data reports from the CRM, analyse further in excel where required and provide information to management and staff in an appropriate format.
- Make minor changes in the CRM.
- Oversee data quality.
- Assist with data entry at peak times.

### **Finance**

- Develop NDIS Service Agreements, based on information provided by staff.
- Maintain evidence of service contracts and approved service delivery to meet audit requirements.
- Analyse data to assist with financial projections, budgeting and planning.
- Resolve NDIS claim issues through analysis and problem solving. Monitor and follow up to ensure payment.
- Ensure invoices to Plan Managers for Extended Families NDIS services are provided and managed in a timely way.

### **Organisational responsibilities**

- Work within a team environment to ensure effective and efficient administration.
- Remain informed about changes to the NDIS, and key policies that impact on NDIS funding and claiming.
- Work within legal and ethical frameworks.
- Promote the aims and values of Extended Families.
- Other duties as required.

## **SALARY AND CONDITIONS:**

### **Award and Salary**

This position is subject to the Social, Community, Home Care and Disability Services (SCHADS) Industry Award 2010. Appointment will be at a SCHADS Level 4 depending on qualifications and experience.

This position is subject to ongoing pay equity increases.

Time in lieu is available with the approval of the line manager.

**Salary Packaging**

Salary packaging is available for permanent or temporary staff, up to the full Threshold (cap) limit for charitable organisations, which is currently \$15,900 per annum.

**Superannuation**

A contribution is made based on the base salary of the amount equivalent to the award or occupational superannuation obliged to be paid by the Employer pursuant to the provisions of any industrial award, industry-wide agreement or Commonwealth or State law. Currently this is 9.5%.

**Reimbursement for Expenses**

Reimbursement will occur for all out-of-pocket expenses properly and reasonably incurred in performing the duties of this position, as negotiated with the CEO, upon production of evidence of incurring the expenses. This includes authorised travel within work hours.

**Employment Entitlements**

All employment entitlements are based on the Social, Community, Home Care and Disability Services Industry Award 2010.

**Equal Opportunity**

Extended Families Australia is an equal opportunity employer.

**Cultural Diversity**

Extended Families promotes cultural sensitivity and diversity. Individuals from CALD or ATSI backgrounds are encouraged to apply.

**Child Safety**

Extended Families Australia is an agency committed to the safety of children.

## POSITION SELECTION CRITERIA

### 1. Mandatory

- 1.1 Demonstrated knowledge, experience and competency in data management and cloud based data systems.
- 1.2 Demonstrated financial competency, budgeting and planning skills.
- 1.3 Demonstrated strong problem solving ability.
- 1.4 Demonstrated highly developed interpersonal and verbal communication skills and the ability to communicate effectively with staff, people with a disability and their carer's and families.
- 1.5 Demonstrated ability to complete administrative tasks in an organised manner, the ability to manage time effectively and prioritise tasks.
- 1.6 Knowledge of the National Disability Insurance Agency categories and line items and relevant policies or ability to quickly learn these.
- 1.7 To be computer literate and be proficient in MS Office software, especially MS Excel.
- 1.8 Knowledge and expertise in using and managing Salesforce CRM.
- 1.9 Appropriate qualification in finance or project management.
- 1.10 A commitment to working within the Extended Families Values and Mission and to contribute to continuous improvement.

You will be required to undergo a Police Check, and have a current Working with Children Check. (Despite this not being a client facing position, all Extended Families staff are required to have these checks)

### 2. Highly desirable

The following criteria are not mandatory for this position but highly desirable.

- 2.1 Experience and skills in service evaluation.

## HOW TO APPLY

Enquiries and written applications addressing the key selection criteria, including curriculum vitae and the names of three (3) referees should be submitted by email to Ms Julie Langdon, CEO, Extended Families Australia. Email [ceo@extendedfamilies.org.au](mailto:ceo@extendedfamilies.org.au)

Closing date for applications is Monday 10<sup>th</sup> December 2018.