

Job Description – Chief Financial and Information Officer (CFIO)

MASH Trust is an innovative provider of health and disability support services supporting 2,000+ people and whānau and with a staff of 600 people.

Our services are offered through day programmes, support within MASH Trust homes, and support in the community.

We operate services throughout the lower North Island in Wellington, Kapiti, Horowhenua, Manawatu, Whanganui, and Hawkes Bay and our head office is in Palmerston North.

MASH Trust Mission & Values

Our Mission: Working together to achieve great lives.

Our Values

- Relationships – Build open relationships based on honesty and respect
 - Communication – Communicate with an open mind and heart
 - Mana – Recognise and promote the mana and strengths of the individual
 - Opportunities – Take opportunities to learn and grow together
 - Believe – Believe that together we will make a difference
 - Fun – Make fun a goal
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Overview

Reports To:	Chief Executive
Direct Reports:	3 (may be subject to change)
Location:	Palmerston North (with travel across the lower North Island as required)
Hours:	Full-time (80 hours per fortnight)
Delegations:	Tier 2 – In accordance with current delegations' policy

Role Purpose

The Chief Financial and Information Officer is responsible for leading a multi-function team across Payroll, Finance, Commercial (Contracts) and Information Technology. The aim of this role is to advise the Chief Executive and Executive Leadership Team on the current and future use of financial and technology assets and resources, to future proof and improve the sustainability of MASH Trust

and its assets and resources. This role provides the operational support of the Payroll, Finance, Commercial and Technology teams.

This position will report directly to the Chief Executive and through to the Board of Trustees as well as being a key member of the Executive Leadership Team. There will be a relationship with the Chair of the Audit & Risk Committee.

The position maintains the financial integrity and control for the organisation through the Financial Management System, policies and procedures, budgeting, delegations and internal control environment. Internal customers receive advice and support on the financials for services, forecasting, decision making, business cases and pricing and the Chief Executive and Executive Leadership Team are supported with decision making at a strategic level.

The Chief Financial and Information Officer provides strategic leadership and oversight of the organisation's entire contract portfolio, including funding, service, supplier, and other commercial agreements. This encompasses contract negotiation, governance, risk management, compliance, performance monitoring, and the optimisation of contractual outcomes for the organisation. The role works in partnership with operational leaders who hold day-to-day responsibility for contract delivery, providing strategic guidance and oversight to support successful contractual and organisational outcomes.

This position also advises on the use of technology hardware and software and cyber security to modernise MASH Trust as well as protect our information both personal and professional.

This position is the main source of financial and technological organisational advice within MASH Trust and supports accountable managers to have good understanding and oversight of their areas of responsibility. Data is analysed and translated into information that is presented succinctly to highlight key areas of interest and trends. Support and partnership are provided to enable quick turnaround responses of information including developing business cases and pricing services and technology components for new and existing services.

Processes and systems are updated and streamlined, utilising change management skills and process improvement experience to ensure fit for purpose systems and processes in an ever-changing environment.

The Chief Financial and Information Officer will work in partnership with the Executive Leadership Team and Chief Executive to develop and implement strategy and enhance financial performance and support organisation-wide improvement.

Senior Leader

As a Senior Leader, this role contributes to shaping service delivery across an evolving sector.

- Embed the MASH Trust's Quality Framework and *The MASH Way* throughout all operations.
 - Drive operational excellence and ensure organisational compliance
 - Anticipate and respond to change in a dynamic environment.
 - Strengthen MASH Trust's reputation by modelling our values and engaging effectively with stakeholders.
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Key Relationships:

All MASH Trust staff have a responsibility for managing relationships in some or all the key sectors we work within. In this role, the key relationships to be developed are as follows:

Internal:

- Chief Executive, The MASH Trust Board and Sub-Committees, ELT, Senior Leaders, MASH Trust managers and staff.

External:

- Funders including but not limited to (Te Whatu Ora, Whaikaha (Ministry for Disabled People), Oranga Tamariki, Corrections, Local Authorities), the people we support, family/whānau and tangata whenua, iwi partners, primary & community health teams, related Health and Disability Service Providers, external consultants and contractors, suppliers and other providers (e.g. Banks and other financial entities, Auditors), digital health partners, debtors and creditors, Inland Revenue, Charities Commission.

Key Areas of Responsibility

Key Duty Area	Tasks	Performance Measures
Payroll, Finance, Commercial, and Information Technology Leadership	Provide professional leadership and operational management to the Payroll, Finance, Commercial, and Information Technology teams. The culture of the team demonstrates constructive and enabling relationships across the organisation.	The team has an appropriate mix of skills and experience relevant to service organisational requirements. All teams deliver upon their expected outcomes in accordance with their relevant responsibilities and in accordance with organisational strategy and requirements. This includes day to day operational delivery from the Payroll, Finance, Commercial, and Information Technology teams. The team is a high performing, satisfied team and works collaboratively within all of MASH Trust to achieve a team vision that is supported by clear goals and KPI's.
Technology & Cybersecurity	The Team provides relevant and modern advice on technology trends and advises on assets and resource to modernise MASH Trust and to ensure robust infrastructure and data and system security and privacy for our internal and external customers.	Modern and appropriate cyber security processes are in place to ensure protection of personal and professional information for MASH Trust, the people we support, and all stakeholders. Digital transformation initiatives deliver measurable improvements in organisational efficiency, data quality, reporting and analytics capability, informed

	Oversee the organisational technology roadmap aligned to MASH Trust strategy, managing hardware/software and standardising platforms. Accountable for organisational data governance, reporting frameworks, data quality and information management. Lead the development and implementation of digital transformation initiatives that improve organisational efficiency, data capability, decision-making and service outcomes. Provision of internal user support of technology systems and software to allow end users to seamlessly undertake their responsibilities. This position is accountable for ensuring mechanisms, training and supports are put in place to provide a compliant cybersecurity platform for MASH Trust.	decision-making, and service outcomes, while aligning with organisational strategy and sustainability objectives. Assets are current and fit for purpose and stable with high levels of uptime. Organisational data and reporting frameworks enable accurate, timely, secure, and meaningful information to be available for governance, strategic decision-making, performance monitoring, and continuous improvement across the organisation. End user satisfaction of IT infrastructure is high. Satisfactory audit/compliance results with a track record of security incident reduction.
Funds Management	Ensuring funds are managed to maximise return on investment while minimising risk including appropriate control structures around the use, transfer, and investment of funds. Provide strategic and operational leadership for the organisation's full accounts receivable and accounts payable cycles, including invoicing, collections, supplier payments, reconciliations, and dispute resolution. Ensure strong internal controls are in place Executive to safeguard organisational assets, prevent errors, and reduce financial risk. Monitor debtor ageing, cashflow impacts, and credit risk, and implement strategies to improve collection performance.	Cash forecasts are prepared that provide understanding of current and future cash positions and enable timely decision-making regarding investment options and borrowing needs. Sufficient funds are available to meet ongoing operational and capital investment requirements. Compliance with relevant legislation, accounting standards, audit requirements, and funding contracts. Provide accurate, timely reporting on debtor and creditor positions, trends, risks, and variance Executives to the Executive Team and Board. No surprises.

Information Management and Reporting	Strategic advice, information and insights on resource utilisation and fiscal management is provided to the Chief Executive, Board of Trustees and Executive Leadership Team enabling timely and considered decisions. Provision of timely, accurate dashboards and reports in a format appropriate to users. Reports provide insight on fiscal management, organisational risks and mitigations and how we may best optimise our use of resources now and in the future. Focus on process improvement.	The Chief Executive, Board and Executive Leadership Team have the information required to make effective decisions on the sustainable utilisation and acquisition of resources and the allocation of funds. Budget holders have high levels of confidence and satisfaction with the financial information provided. Systems are fit for purpose, with processes that are effective and designed with the user experience in mind. All internal and external reports are produced within required timeframes. No significant issues raised through the audit process and audit management matters are resolved.
Financial and technology Advice and Support	Interpret financial and operational information to provide meaningful insights, identify key risks and opportunities, and support informed decision-making across the organisation. Provide strategic financial advice and analysis to the Chief Executive, Board of Trustees, Executive Leadership Team, and managers to support organisational sustainability, growth, and long-term objectives. Develop and execute financial strategies aligned with organisational goals, including long-term financial forecasts, scenario planning, and sustainability initiatives. Present complex financial information in a clear and accessible manner to support effective governance and strategic decision-making.	The Chief Executive, Board of Trustees, Executive Leadership Team, managers, and staff are provided with timely, accurate, and meaningful financial information that enables informed decision-making and appropriate organisational focus. Financial advice and analysis support the development of sustainable organisational strategies, effective resource allocation, and the achievement of long-term objectives. Strategic decisions are informed by robust financial modelling, analysis, and risk assessment. Financial strategies are developed and implemented to support organisational sustainability, manage risk, and strengthen long-term financial performance.
Budgeting, Pricing and Modelling	A clear process is in place to develop annual budgets in partnership with budget managers and the Executive Leadership Team.	Operating, Capex and Balance Sheet budgets are prepared within required timeframes.

		There is confidence in the budgets produced and buy-in from budget managers, Executive Leadership Team and the Board.
Payroll	Oversee Payroll function and ensure accurate, timely and compliant payroll processing. compliance with legislation. Provide strategic advice to the Executive Leadership Team on reward and remuneration trends and workplace costs impacts.	All payroll and leave processes meet all legal, contractual and organisational requirements. Compliance with employment law, tax obligations, ACC, superannuation/KiwiSaver, and audit requirements.
New Business	Provide strategic commercial leadership and financial due diligence to evaluate, model and support new business opportunities” Support the preparation of high-quality funding proposals, ensuring financial accuracy, compelling value propositions, and compliance with funder requirements. Develop innovative financial models that support scalable growth, sustainable service delivery, and competitive positioning in the market.	As new service opportunities are identified, timely financial modelling supports business cases, tenders, and pricing. Growth of new business within MASH Trust year on year occurs. Successful implementation of new business occurs in accordance with tender and contractual obligations and requirements. Internal collaboration with key stakeholders ensures that new contracts and or services is delivered to the people in the community served and they are fiscally sound.
Commercial / Contracts	The Chief Financial and Information Officer provides strategic leadership and advice for the organisation's entire contract portfolio, including funding, service, supplier, and other commercial agreements. This may encompass contract negotiation, governance, risk management, compliance, performance monitoring, and the optimisation of contractual outcomes for the organisation. The role works in partnership with operational leaders who hold day-to-day responsibility for contract delivery, providing strategic guidance and oversight to support successful contractual and organisational outcomes. Ensure adequate insurance is in place to cover recognisable risks.	Insurance policies and levels of cover are reviewed annually. Changes to insurance risks are notified to Executive Leadership team and brokers and are reported. All major funding, expenditure and service contracts are reviewed regularly for value for money, pricing accuracy, and compliance. Contractual KPIs are met by MASH Trust and by suppliers, with corrective actions initiated where performance falls short. Zero material contract breaches attributable to financial or commercial oversight gaps.

	Provide strategic advice on the commercial and financial elements of the organisations contract portfolio including funding, supplier and service contracts, ensuring value for money, contractual compliance, and alignment with organisational objectives are being achieved and delivered upon. Oversee supplier required reporting enabling the Technology team to extract the required data in accordance with supplier and organisational requirements. Work closely with the Executive Team to evaluate supplier proposals, assess commercial risks, and support strategic sourcing decisions. Drive continuous improvement and cost efficiency through proactive contract management, supplier relationship development, and identification of commercial opportunities. Provide strategic oversight of the organisation's asset portfolio ensuring assets are planned, acquired, maintained, and disposed of in line with long-term financial sustainability and organisational priorities. Ensure robust asset registers and reporting systems are maintained to support accurate forecasting, depreciation, and financial planning. Optimise asset performance and lifecycle value, using data-driven insights to inform investment decisions, capital planning, and replacement strategies.	Cost savings or cost avoidance targets achieved, driven by contract optimisation or renegotiation. Asset management plan/register updated frequently and is up to date, aligned with organisational strategy and long-term financial sustainability. Timely asset lifecycle reporting, including depreciation schedules, replacement forecasts, and impairment assessments. Improved asset utilisation rates measured annually. Data-driven investment recommendations adopted, with clear financial modelling and scenario analysis.
Policies, Procedures and Governance	Develop, maintain, and communicate policies and procedures as appropriate to the Payroll, Finance, Commercial, and Information Technology functions.	Staff have access to appropriate policies and procedures that are useful, inform and provide guidance. Appropriate internal controls are in place to safeguard the organisation.

	Ensure adherence to accounting standards, charity regulations, and compliance requirements.	Legislative requirements are met.
People, Culture & Wellbeing	Contribute to the Executive Leadership Team approach to the development and role modelling of a strong culture/morale throughout the organisation. Attract, develop, and retain a capable, engaged team. Working with the Talent Acquisition and People and Culture team, recruit/onboard talent; set goals; coach individual performance and growth. Build team and individual capability; have Performance Development Plans in place for all direct reports.	Turnover rate is no greater than 20% per annum. Maintain safe and appropriate staffing levels that meet the needs of the people we support/our organisation. Improvement in engagement and retention and employee job satisfaction scores for area of responsibility and organisation. Development and succession plans are in place and are living documents. Learning and development objectives are being achieved.
Risk Management	Lead the identification, assessment and mitigation of strategic, commercial, financial and technology risks across the organisation. Identify, report, reduce / eliminate situations of potential/real risk to MASH Trust and its commercial stability. Report to the Board subcommittees on all areas of significant risk. Adhere to MASH Trust's policies and procedures.	Risk Management plans are current and regularly reviewed for the Finance division. MASH Trust policies and procedures are followed to reduce risk to the organisation and ensure quality and consistency are maintained.
Stakeholder Engagement	Support the maintenance of a positive image of MASH Trust internally externally. Develop, effective and appropriate networks and links with a variety of funders and other agencies to maintain and support and create new business opportunities. Initiate and attend meetings with appropriate to MASH Trust and the Chief Financial and Information Officer role. Proactively share	Assist to raise the organisation's reputation and profile by addressing funder, community groups and stakeholders (both internal and external). Bring to MASH Trust information relevant to our organisation to ensure we continue to innovate and evolve based on best practise and sector developments. Feedback supports that you engage with stakeholders positively and professionally.

	information and strategies internally and externally as appropriate.	
Health and Safety, Privacy	Implement MASH Trust's Health and Safety Framework and Plan as well as the Privacy framework and training within the team. Apply health and safety policies and procedures to ensure all staff operate within the framework of acceptable workplace practice. Comply with responsibilities of the Health and Safety at Work 2015 legislation.	Work safely encouraging and supporting others to do the same. Health & Safety incident reporting and analysis is completed promptly and in accordance with policies and procedures. Required corrective actions are taken. Strategies are in place and actions taken that reduce harm and improve safety while growing a resilient work force. All staff are trained in the Privacy Act 2020 and their obligations as it relates to their role.
Continuous Improvement	Processes are in place to effectively manage the business and maintain the highest quality for all areas of oversight, and these are reviewed periodically to ensure they are fit for purpose. Support a culture of curiosity, improvement, and shared learning across MASH Trust. Have an ongoing focus in the improvement and where relevant simplification of organisational processes and workflows and that these processes and workflows enable the effective delivery of service Executives to our communities.	MASH builds on our culture of quality and innovation and can demonstrate improvements in consistency and responsiveness. MASH introduces new services that respond to an individual's hopes, desires and potential and these services are agile and adaptable. Accreditation audits are completed with few, if any, improvement recommendations. Processes and workflows are relevant and add value and are easy to use and understand throughout the organisation.
Te Tiriti o Waitangi	Demonstrate commitment to honouring Te Tiriti o Waitangi. All staff are expected to support better health outcomes for Māori by working in partnership with Māori, respecting Māori leadership and perspectives, and helping to create a culturally safe environment. This includes learning about Te Tiriti, understanding its relevance to our work, and making sure Māori voices and needs are included in our decisions and services.	MASH can demonstrate understanding of Te Tiriti o Waitangi and its relevance to their role. There is evidence of increased Māori participation and engagement and improved equity, cultural safety and positive outcomes for kamahi and whanau Māori.

Other Duties	Any other duties reasonably associated with the role.	
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Travel

Travel to MASH TRUST sites across the lower North Island may be required (occasionally with overnight stays).

Person Specifications

Core Competencies

<i>Decision quality:</i>	Sound, timely judgement using analysis and experience.
<i>Business insight:</i>	Understand drivers, trends, and how strategies play out.
<i>Customer focus:</i>	Build solutions that meet customer needs and sustain relationships.
<i>Accountability:</i>	Own outcomes; set clear measures and feedback loops.
<i>Build effective teams & networks:</i>	Foster belonging, collaboration, and cross-functional relationships.
<i>Vision & purpose:</i>	Communicate a compelling future and rally support.
<i>Communication:</i>	Tailor messages; listen actively; enable open dialogue.
<i>Trust & integrity:</i>	Keep commitments; act consistently.
<i>Adaptability:</i>	Read context and adjust approach.

Experience & Skills:

- A Chartered Accountant qualified with 5-10 years' experience in a similar position.
- A member of Chartered Accountants Australia and New Zealand (CAANZ)
- Knowledge and experience with technology and cyber security.
- Knowledge of Tier 1 reporting requirements.
- Experience in NGO / NFP sectors and constrained budgets.
- Proven team leadership and people management skills within large, multi-disciplinary, dispersed organisations.
- Visionary, innovative, and supportive leadership style with the ability to inspire others to be part of a team working toward achieving organisational strategies.
- Values-based leadership with the ability to lead cultural and service change.
- Highly developed analytical skills.
- Ability to maximise system functionality and innovate.
- Change management skills and process improvement experience.
- Strong facilitation / presentation and communication skills (verbal, written, interpersonal).
- Comfortable using digital tools, platforms, and Microsoft applications.
- Ability to build warm and effective relationships at all levels.
- Strong planning, organisation, and prioritisation skills.
- Able to work independently, with good judgement and initiative.

- Is curious and has a strong desire demonstrated by previous experience, in continuous improvement
- Understanding of tikanga and Te Tiriti o Waitangi in practice at MASH Trust.

Qualifications & Other Requirements:

- Qualified Chartered Accountant
- Passionate about supporting the organisation to deliver on its work with people experiencing Mental health, alcohol and drug issues and supporting people with disabilities and an empathy for the communities in which MASH Trust operates.
- Passionate about supporting others to grow and succeed.
- Have robust business experience and knowledge and can demonstrate the ability to analyse and negotiate sustainable contracts and funding levels.
- Proven experience managing large budgets.
- Practical, solutions-focused, and able to turn ideas into successful outcomes.
- Strong relationship-building and influencing skills with demonstrated capability to build rapport and trust across enabling service Executives and delivery divisions
- Ability to thrive in a culture of uncertainty demonstrating agility in complex environments
- Positive “can-do” attitude with strong resilience and adaptability.
- Commitment to equity, inclusion, and culturally safe practice.
- Able to maintain a high level of confidentiality and personal integrity at all times.
- Able to present a professional image in all aspects of work, appearance and conduct.
- Sound working knowledge of health and safety requirements for workers
- Flexibility to work varied hours and across multiple locations as required
- Full, clean NZ driver licence.

Acknowledgement

The information contained in this job description is intended to describe the nature and level of work to be performed. This is not considered an exhaustive list of all the responsibilities, duties or skills required in the role. Duties may change following discussion with the role holder.

Employee Acknowledgement

I confirm that I have received, read, and understood the job description for my role. I understand the responsibilities, expectations, and requirements outlined, and I have had the opportunity to ask questions about any parts that needed clarification.

Employee Name: _____

Signature: _____

Date: _____