

Position Description



HERITAGE LIFECARE

Senior Management Accountant

Company Overview:

The Heritage Lifecare Group is a provider of Residential Aged Care Facilities throughout New Zealand. We aim to add value and enhance performance for all those in our facilities. Our employees are united in our common purpose, mission and values and strive to ensure the delivery of respectful and caring services, in an environment that is safe for clients. Heritage aims to enable the continued pursuit of excellence in care through monitoring, auditing, actioning and evaluating services while respecting and valuing our residents, their families and our staff.

Our pursuit of excellence comes from the things we value the most:

- **Integrity** – we do the right thing all the time
- **Respect and Value**– we always respect and value our customers and our colleagues
- **Commitment** – we deliver service with commitment and care
- **Effective** – we measure service effectiveness
- **Efficient** – we always strive for efficiency

Position Overview:

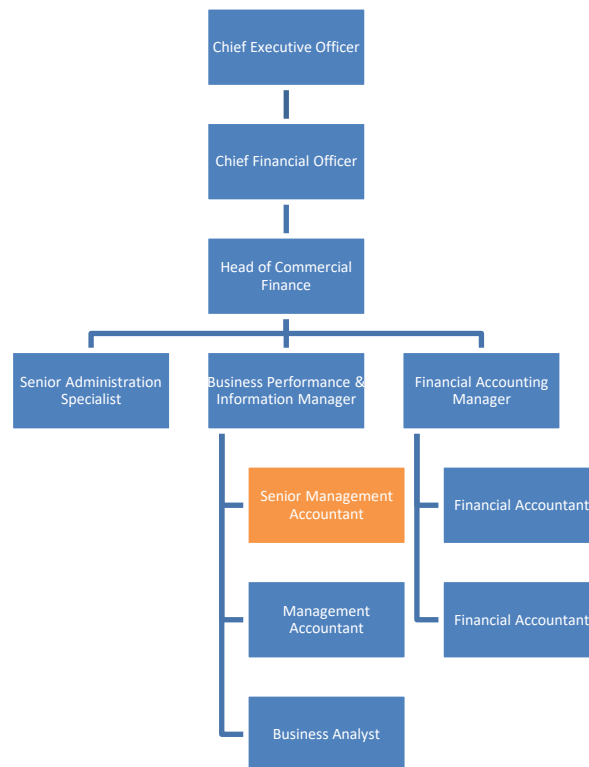
The Group's Senior Management Accountant will be responsible for overseeing the preparation of monthly management accounts and the production of reports and the analysis of variances for key stakeholders. They will be the key point of contact for business managers to help them understand the financial information and assist them to interpret that data to make business decisions.

Reports to: Chief Financial Officer

Functional Relationships:

- Finance Team
- Operations Network
- Executive Team
- Quality and Compliance Team
- Human Resources Team
- Facility and Village Managers
- Project Leaders
- Auditors

Team Structure:



Key Accountabilities:

Financial and Management Reporting

- Prepare the Group's monthly management accounts.
- Prepare monthly reports for the operations team including a detailed review of variances
- Oversee the distribution of monthly reports to key stakeholders and answer any queries as they arise.
- Assist in the preparation of Board and Audit & Risk Committee papers.
- Develop new reports to meet the changing needs of the business.

Business Advisory

- Assist in the evaluation of projects including data gathering, modelling and interpretation of results.
- Support business managers in the understanding and analysis of financial performance.
- Work with business managers to improve their financial acumen.

Accounting Procedures, Controls and Process Improvement

- Identifies and implements process improvement opportunities including improvements in accounting and reporting systems.
- Risks are identified, understood and managed.
- Seek ways to increase the efficiency and timeliness of monthly accounting close process.
- Manage the month end timetable and process.

Budgeting and forecasting

- Assist with the preparation of the annual budget and forecasting. This includes engaging with stakeholders to ensure a robust budgeting process is archived.

Financial Authority:

None

Person Specification:

Essential skills, knowledge and experience

- Chartered Accountant (CAANZ or equivalent professional body) with post-qualification experience. Ensure personal development is consistent with CA requirements.
- At least five years' experience either in a medium to large commercial entity or with a Big 4 firm (audit or business advisory).
- High standard of technical knowledge.
- Strong communication skills with the ability to communicate well with all levels of the organisation, as well as with outside parties.
- An inquisitive mindset and an eye for process improvement.
- Strong analytical skills with the ability to explain complex analysis in a way that can be easily understood by stakeholders.
- Experience in operating and managing a Financial Management Information System (FMIS), preferably Technology One.
- Proven Excel spreadsheet skills.

Desirable skills, knowledge and experience

- Experience in the use of Finance One FMIS.
- Experience in the use of Business Intelligence tools.
- Experience in the Health and/or Aged Care sector.

Core Competencies (Level 2)

Trusted Partner	Values and builds long-term relationships, puts the client's interests in front of their own, is genuinely interested in their client and their business challenges, works hard to understand the client's strategy and approach, not just surface wants. Is reliable – does what they say they will do. Develops and maintains credibility, is genuinely passionate and enthusiastic whilst maintaining authenticity.
Driving for Results	Setting high goals for personal and group accomplishment; using measurement methods to monitor progress toward goals; tenaciously working to meet or exceed goals while deriving satisfaction from that achievement and continuous improvement.
Tenacity	Distinguishes between challenging circumstances and those that are exploitive / dangerous / illegal actions. Addresses difficulties and draws skills, knowledge and understanding to find solutions to problems. Ensures that setbacks and challenges inform the review and evaluation processes. Recognises all people's learning and contribution to feedback. Maintains an energetic and focused approach to new or repeated challenges.
Business Acumen	Displays a keenness and quickness in understanding and dealing with a "business situation" in a manner that is likely to lead to a good outcome. Uses their approach to improving financial performance and leadership development.
Deal with Ambiguity	Anticipates impact of change; plans how to shift gears. Uses ingenuity to compensate without having the total picture. Rises to the challenge, accepting risk and uncertainty as normal. Accepts change in job requirement, schedules, or work environments as part of job. Adaptable in face of the unknown.
Thought Leadership	Uses knowledge of business environment, uses past experiences, relevant literature, best practise, marketing leading approaches and unconventional results which have driven success, comes up with winning ideas, and creates innovative solutions to solve existing and new business challenges.
Courage	Displays professional courage by seeking feedback and listening, says what really needs to be said in a professional manner, communicates openly and frequently, embraces change, makes decisions and moves forward, gives credit to others and holds self and where appropriate others accountable.
Transfer skills to Business	Is able to learn from past experiences across a variety of different industries, organisations and circumstances and can appropriately identify transferable skills for current role/ project / situation to add value and achieve a positive outcome for the business.
Facilitating Change	Encourages others to seek opportunities for different and innovative approaches to addressing problems and opportunities; facilitates the implementation and acceptance of change within the workplace.

The intent of this position description is to provide a representative summary of the major duties and responsibilities and the competencies expected to be performed by employees in this job classification. Employees may be requested to perform job-related tasks other than those specified in this Position Description.