



## **Finance & Administration Co-ordinator**

**Position Title:** Finance & Administration Co-ordinator

**Organisation:** Northland Foundation (NF)

**Location:** Northland wide, based in Whangarei

**Responsible to:** Northland Foundation Manager (NF Manager)

**Primary Functions of the Position:** To provide financial and administration assistance and support to the Manager of Northland Foundation.

### **Key Relationships**

The Finance & Administration Co-ordinator will develop and maintain excellent relationships with:

- NF Trustees and members of the Foundation's Advisory Committees
- Volunteers
- Donors, sponsors and supporters of both NF and NDHB
- Funding Bodies
- Northland District Health Board staff
- Community groups
- Suppliers
- Professional advisors
- Grant recipients
- Local businesses

### ***Term of Contract***

Fixed term – The position is part-time; 20 hours per week - preferably five hours for four days/or four hours per working day between the hours of 8.00am-4.30pm. There can be flexibility on this and working from home can be combined into the role.

### ***Responsibilities and Expected Outcomes***

The position of Finance & Administration Officer encompasses the following major functions or key result areas:

- Supporting the Manager with administration and financial support, project support, and other office tasks.

The outcome requirements of the key responsibility areas are outlined below:

<b>Key Responsibility Area</b>	<b>Expected Outcomes</b>
<b><i>Financial functions</i></b>	<p>Undertake the day-to-day financial tasks ensuring sound financial management as per best practice and management.</p> <p>Tasks include:</p> <ul style="list-style-type: none"><li>• Accounts payable</li><li>• Accounts receivable</li><li>• Receipting of all donations</li><li>• Banking</li><li>• Financial records and bank reconciliation</li><li>• Petty cash</li><li>• Payroll</li><li>• Liaison with accountant and key bank staff</li><li>• Preparation of financial reports</li><li>• Assistance with the production of NF budgets and cash flows</li><li>• Undertake administrative duties to support the management of the relationship with NDHB including receiving, banking and receipting of all donations, liaison with NDHB accounting staff regarding payment of project related costs and management of NDHB fundraising budgets, maintenance of the chattels list and ordering of equipment to be purchased with donated funds</li></ul>

<p><b>Administration functions</b></p>	<ul style="list-style-type: none"> <li>• Provide customer service including answering phone and meeting visitors and guests</li> <li>• Process correspondence - collection of mail, responding to queries and emails.</li> <li>• Manage database and contact lists to ensure they are regularly updated, including: Donors, NF records and information, equipment register, suppliers and service providers, sponsors and Board members.</li> <li>• Maintaining records, filing systems and computer files</li> <li>• Collate and post papers, take and distribute minutes, provide reports for Board meetings and sub-committee meetings as necessary</li> <li>• Provide project support to NF Manager as required</li> <li>• Process Grant applications in accordance with the determined guidelines, undertaking follow up and reporting where required/requested</li> <li>• Work with the NF Manager to apply for funding where required in accordance with guidelines and legislative procedure</li> <li>• Participation in related events of interest to supporters of the Foundation</li> <li>• Support the NF Manager with the administration of Facebook, website and newsletters</li> <li>• Undertaking any other tasks/duties as may be reasonably required.</li> </ul>
<p><b>Key Responsibility Area</b></p>	<p><b>Expected Outcomes</b></p>
<p><b>Communications and Relationships</b></p>	<ul style="list-style-type: none"> <li>• Support the NF Manager to build strong relationships with key stakeholders including: NDHB staff, Tindall Foundation, current and potential donors, sponsors, funding bodies</li> <li>• Work closely with other charitable trusts and community organisations as directed by the NF Manager</li> <li>• Work to promote and build brand awareness of NF</li> </ul>

	<ul style="list-style-type: none"> <li>• Work with The NF Manager to maintain networking opportunities with internal and external individuals/ organisations relevant to the foundation and its goals</li> <li>• Ensure effective promotion of all NF programmes and projects.</li> <li>• Achieve high and positive profile for NF with all activities.</li> </ul>
<i>Develop and Maintain own professional development, level of expertise and networking</i>	<ul style="list-style-type: none"> <li>• Identify goals to foster own professional growth and maintenance of expert skills relating to Financial &amp; Administrative duties</li> <li>• Meet with the NF Manager as required monthly and provide a report on activities, outcomes and areas of concern</li> <li>• Maintain a professional appearance and manner at all times</li> </ul>
<i>Treaty of Waitangi</i>	<ul style="list-style-type: none"> <li>• Include the principles of the Treaty of Waitangi within all aspects of the role and its outcomes</li> <li>• Ensure that consultation and engagement processes include appropriate mechanisms to meet the need of Maori in a culturally appropriate and safe manner</li> </ul>
<i>Health &amp; Safety</i>	<ul style="list-style-type: none"> <li>• Promote an environment of physical, occupational, cultural, ethical and legal safety</li> <li>• Observe safe work practices, rules and instructions relating to work, and be pro-active in hazard management</li> <li>• Willingly co-operate in the achievement of all health and safety goals and initiatives by: <ul style="list-style-type: none"> <li>– Practicing and observing safe work methods;</li> <li>– The use of safety equipment;</li> <li>– Reporting unsafe conditions or equipment; and</li> <li>– Reporting and documenting all accidents or incidents</li> </ul> </li> </ul>
<i>Other Legislation</i>	<p>Adhere to relevant aspects of following legislation:</p> <ul style="list-style-type: none"> <li>• Privacy Act (1993)</li> <li>• Health Information Privacy Code (1994)</li> </ul>

	<ul style="list-style-type: none"><li>• Unsolicited Electronic Messages Act (2007)</li></ul>
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***Variation of Duties***

Duties and responsibilities described above should not be construed as a complete and exhaustive list as it is not the intention to limit in any way the scope or functions of the position. Duties and responsibilities can be amended from time to time either by additional, deletion or straight amendment by the Northland Foundation Board to meet any changing conditions, however this will only be done in consultation with the employee.

## *Person Specification*

### **Education and Qualifications**

#### *Essential*

- Current New Zealand Drivers License

#### *Desirable*

- Business administration or finance-related diploma or degree

### **Experience**

#### *Essential*

- Administration and finance expertise and experience
- Sound experience with taking and dealing with money
- Computer literacy including experience using Microsoft Office suite including Excel, Word, Outlook, MYOB and or similar accounting software.

#### *Desirable*

- Not-for-profit sector or Trust experience or broad understanding of not-for-profit sector
- Understanding of Northland communities
- Working with diverse communities
- Evidence of ongoing learning
- Experience using WordPress and other online content management systems
- Working with Boards of Trustees
- Powerpoint and Publisher and ability to quickly learn other programs.

### **Awareness and Understanding of:**

#### *Essential*

- Inland Revenue (especially PAYE & GST)

#### *Desirable*

- Charities Commission and legal aspects of charitable organisations

### **Skills & Personal Attributes**

- Understanding and experience of financial best practice and day-to-day procedures
- Strong administration and organisational skills
- A willingness to help out where needed and accept responsibility for a broad range of tasks including general office tasks
- Attention to detail to ensure high level accuracy and efficiency.
- Excellent organisational and planning skills, can work to meet agreed deadlines

- Proven skills in time management including multi-tasking, organising and prioritising tasks.
- Experience and ability to work under pressure
- Be professional and able to take direction
- Works well as part of a team as well as independently
- A strong work ethic and a professional attitude
- A high level of interpersonal and communication skills, capable of building relationships with people at all levels, both externally and internally.
- Well presented, confident and outgoing.
- Have an enthusiasm for the Northland community, fundraising and commitment to the aims and objectives of Northland Foundation.
- Ability to be resilient, adapt and work effectively within a variety of situations
- Demonstrates honesty, integrity and respect for all
- A commitment to quality and excellence, with a proven ability to contribute to process improvement.
- Sense of Humour

### ***Performance Development Review***

An individual Development Plan will be developed to reflect the contribution this position is expected to make towards achieving the organisations objectives and measures. Key result areas will be developed and agreed at this time.

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**Authorised by:**

Northland Foundation Board

**Date:** 20/07/2017

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### ***Acceptance***

Acceptance of the position implies acceptance of this position description.

**Position Title:** Finance & Administration Officer

**Signature of employee:**

**Date:**