



## Position Description

Position title	Management Accountant
Position reports to	Financial Controller
Tenure	Permanent – Full time
Date	August 2025

### About St Margaret's

Empowering girls to learn, live and lead lies at the heart of St Margaret's College's ambition. In a rapidly evolving social, economic, technological and environmental landscape, we adapt continuously to ensure our students are ready to make their way in the world, while upholding values that remain as important today as they did when our College was founded over a century ago.

### Our Vision

To create empathetic, confident and connected global citizens who value personal excellence and strive to make a positive difference.

### Our Purpose

Empowering girls to learn, live and lead.

### Our Values

Integrity – Kia pono, Excellence – Kia kairangi, Resilience – Kia manawaroa, Equality – Kia tōkeke, Higher purpose – Te pūtake.

### Purpose of the position

This role is crucial for providing financial analysis and insights that support strategic decision-making and ensure the efficient allocation of resources and the maximization of income. The ideal candidate will be a skilled professional with a strong understanding of management accounting principles and a passion for contributing to an educational environment.

### Key Accountabilities

Accountability	Expected deliverables
Budgeting and Forecasting	<ul style="list-style-type: none"><li>Assist with undertaking the annual budgeting process</li><li>Working with department heads to develop accurate and realistic budgets</li><li>Monitor performance against these budgets, providing regular variance analysis and forecasting future financial scenarios</li><li>Reviewing expenditure and resolving any issues to ensure costs are being costed and allocated correctly</li><li>Assist in preparation of current year and multi-year long-term forecasts (including salary forecasts)</li><li>Analysis including what if and benchmarking.</li></ul>
Financial Reporting and Analysis	<ul style="list-style-type: none"><li>Preparation of monthly management reports, including financial performance, financial position, capital expenditure, dashboard reporting, project reporting and other board reporting as required</li><li>Assist with the preparation of cash flow forecasts for cash management</li><li>Analyse financial data to identify trends, opportunities for cost savings, and potential risks</li><li>Assist with the preparation of Annual Performance reports for St Margaret's College Trust Board and other entities</li><li>Liaising and providing information to External Auditors or internal reviews as required.</li></ul>

Capital Asset and Strategic Planning	<ul style="list-style-type: none"> <li>• Assist with financial planning and long-term strategic initiatives</li> <li>• Provide financial modeling and analysis for potential new projects, capital expenditures, or changes in school operations.</li> </ul>
Cost Management	<ul style="list-style-type: none"> <li>• Assist Heads of Departments / Faculties with costings and evaluations for significant procurements and projects</li> <li>• Develop and maintain cost models to track and analyse expenses related to different school departments, programs, and projects</li> <li>• Provide recommendations to optimise spending and improve operational efficiency</li> <li>• Monitoring grant funding and donations, and the expenditure against these funds.</li> </ul>
Insurance	<ul style="list-style-type: none"> <li>• Assist with information required for annual insurance renewal</li> <li>• Manage the collation or calculation of complex insurance claims.</li> </ul>
Financial and HRIS systems	<ul style="list-style-type: none"> <li>• Becoming proficient in both Finance and HRIS systems to enable extraction of data and information as required and to provide cover for payroll officer as required</li> <li>• Provide support to the Financial Controller and General Manager as required.</li> </ul>
Other	<ul style="list-style-type: none"> <li>• Providing excellent customer service to all stakeholders, including budget holders and colleagues either in person, email or phone</li> <li>• Support and train colleagues in the use of finance systems, webview reporting and processes</li> <li>• Ensure all financial processes adhere to relevant accounting standards, legal requirements, and school policies</li> <li>• Advise and assist staff and student groups involved in organising school activities including reconciliation of income and costs</li> <li>• Ensuring important documentation is filed</li> <li>• Assisting with other Finance team member duties when they are absent</li> <li>• Perform any special projects and other duties as reasonably requested by the Financial Controller and or General Manager.</li> </ul>
Being part of the St Margaret's team	<ul style="list-style-type: none"> <li>• Actively, collaboratively, and positively participate as a member of the team</li> <li>• Proactively look for opportunities to improve processes</li> <li>• Comply with and support all health and safety policies, guidelines and initiatives</li> <li>• Ensure all incidents, injuries and near misses are reported into PeopleSafe</li> <li>• Adhere to all St Margaret College procedures, policies, guidelines, and standards of integrity and conduct.</li> </ul>

### Functional Relationships

- Finance Team members
- General Manager
- Executive Principal
- Budget Holders and Managers, and other school staff
- Parents and students
- External suppliers and contractors
- Bank and insurance Broker Personnel
- St Margaret's College Old Girls Association. Parents and Friends Association and Foundation Board members
- External Auditors.

### Qualifications & Experience

- Education: A bachelor's degree in accounting, finance, or a related field is required. A professional accounting qualification (e.g., CA, CPA or CMA, or equivalent) is preferred
- Experience: A minimum of 5 years of experience in a management accounting or similar financial analysis role. Experience in the education or non-profit sector is a plus
- Strong analytical and problem-solving skills
- Excellent communication and interpersonal skills, with the ability to explain complex financial information to non-financial stakeholders

- Proficiency in financial software (e.g., Greentree) and advanced skills in Microsoft Excel. Adobe Acrobat and Google Systems suite
- Strong experience in building and maintaining models, and implementing and managing budgeting, forecasting and costing systems
- Strong attention to detail and a high level of accuracy
- Ability to work independently and as part of a team
- A strong customer focus
- Proven ability to develop and maintain effective relationships with budget holders, other staff and parents from diverse backgrounds
- Outstanding verbal and written communication skills
- Strong organisational skills, self-motivation and Initiative, with the ability to multitask and prioritise work effectively
- Well-developed problem-solving skills, with proven experience in creating solutions and Identifying improvements to processes
- The proven ability to work as an effective and constructive team member with a willingness to work as part of the team and autonomously
- Awareness of cyber and fraud risks, and processes and controls to mitigate these
- Flexible and adaptable to changing priorities
- Able to always maintain confidentiality and act professionally
- Mindful of the special character of the school
- National Police Vetting Check (with results considered satisfactory by the School)