

Finance Coordinator

APPOINTED BY: Regional Management Team

Term: 2 years

VERSION DATE: April 2025

POSITION SUMMARY: Ensures that all financial business relating to the region is accounted for in a timely, effective and efficient manner. This role is part of the Regional Management Team.

RESPONSIBILITIES:

- Ensures that all financial resources of the region are accounted for in an effective and efficient manner.
- Coordinates the financial long-range plan in conjunction with other team coordinators, using guidance in the SAI handbook.
- Prepares and maintains the annual budget for the Region
- Manages bank accounts and investments and keeps accurate and current records of all financial transactions
- Receives all funds paid to the region and issues all payments
- Manages all transactions via Xero software
- Holds authority, along with the Team Coordinator, to sign contracts on behalf of the region
- Provides past financial information to RMT Coordinators as required to assist with the preparation of budgets for their portfolios
- Coordinates projects to raise non-dues income (ways and means)
- Presents a report on the region's financial position at meetings of the Regional Management Team
- Provides monthly reports and distributes to the RMT
- Prepares an annual financial statement and annual audit report for submission to International Headquarters as part of the State of the region (SOTR)
- Submits accounting records for audit at the close of the fiscal year to a qualified person (or persons) approved by the Management Team or for examination or audit at any time as directed by the Management Team. The auditor is recommended and moved by Finance Coordinator at RAMM.
- Files annual return with Department of Internal Affairs for Charities Commission by 30 June which is within six months of balance date 31 December
- Provides advice and training to chapter treasurers and serves as a resource to chapters with financial questions
- Provides financial information necessary to complete applications for corporate gifts/grants
- Ensures compliance with all tax requirements and files GST returns as required by Inland Revenue in timely manner
- Provides appropriate financial documentation for publishing on SANZ website
- Completes appropriate financial tasks associated with convention and participate in regional convention activities as requested by the Chair of the Regional Convention.

EACH REGIONAL MANAGEMENT TEAM MEMBER WILL:

- Attend all RMT meetings as required
- Have the ability to participate in online meetings
- Check and respond to emails regularly (within 3 days)
- Submit regular progress reports to the Regional Management Team
- Provide budget information to the Regional Management Team (as required)
- Maintain effective contact with other regional and international personnel as appropriate to the role
- Recruit additional team members (possibly temporary) to assist with completing required activities in consultation with the RMT

- Maintain comprehensive records in a shared regional document repository
- Create record of activities and their applicable deadlines and reminders that will be loaded into Teamwork by the Teamwork administrator, ensuring this is available for a successor to follow
- Contribute to, and implement her assignments from the region's long range strategic plan
- Assists in maintaining sweetadelines.co.nz to ensure it is up to date and maintain web pages that the Finance Coordinator is responsible for (with support if needed) by passing these updates onto the Communications Coordinator
- Identify possible successors, train and provide assistance once appointed.

POSITION EXPECTATIONS:

- Appropriate financial knowledge
- Strong organisational skills
- Effective verbal and written communication skills
- Ability to maintain confidentiality
- Problem-solving and decision-making skills
- Ability to manage deadlines
- Ability to work independently and as a member of a team
- Personal presentation appropriate to a regional representative
- Ability to attend regional events; some travel is expected.

Each RMT Coordinator is expected to manage her own workload, help others and/or request help when needed from others in the team. Team decisions are made by consensus, and the Team Coordinator takes responsibility for managing the overall decision-making process. The Team Coordinator is expected to monitor overall progress of projects, and identify if there is a need for temporary assistance for a team member, and/or for matters that may include workload, skills, knowledge gaps and team fit.

Roles can sometimes overlap and RMT Coordinators are often working on the same project at the same time. Coordinators are expected to manage projects through Teamwork, which gives task visibility to all project team members and provides the Team Coordinator with an overview of all activities.

The [RMT handbook](#) is available on the International website for reference for all RMT personnel.