LEARNINGWORKS
Kia hāngai te ako | We help learning work.

POSITION DESCRIPTION: FINANCE COORDINATOR

ABOUT LEARNINGWORKS

Kia hāngai tea ko | We help learning work.

We design, develop and deliver learning through: Learning Design (designing and creating learning resources), Training (delivering training), Learning Technologies (developing learning platforms).

Our holistic approach integrates expert Learning Design, sound and secure Learning Technologies and impactful Training & Development to create cohesive and effective educational solutions.

LearningWorks has been in business since 2005, providing quality learning and training for the education sector, health sector, Government and commercial organisations.

ROLE PURPOSE

The Finance Coordinator is responsible for coordinating and maintaining LearningWorks' day-to-day financial operations, ensuring accurate financial information, timely reporting, effective financial controls and sound revenue management.

This is a hands-on role that combines operational finance responsibilities with financial analysis, forecasting and commercial support.

Working closely with the Chief Executive, Leadership Team and Wintec Finance, the role will ensure LearningWorks has clear visibility of its financial performance, cash flow, project profitability and emerging financial risks.

Core functions include:

1. Coordinate day-to-day financial operations, including invoicing, accounts receivable, accounts payable, reconciliations and monthly reporting.
2. Ensure all billable work and contractual revenue is accurately captured, invoiced and reconciled against operational activity.
3. Prepare and maintain accurate financial information, reporting and analysis to support the Chief Executive and business decision-making.
4. Support budgeting, forecasting, cash flow management and financial performance monitoring.
5. Develop, document and improve financial processes, procedures and controls to strengthen accuracy, efficiency and accountability.
6. Work collaboratively with Wintec Finance and internal stakeholders to meet financial reporting, compliance and operational requirements.

EMPLOYMENT DETAILS

Location	The appointee will be based in our Hamilton office but may be required to work at other sites from time to time.
Report To	CE
Remuneration	$65,000 to $81,300
Band	Band 4
Direct Reports	Nil
Financial Authority	Nil

Tenure	Permanent Part Time [0.5 FTE – 20 Hours]
Functional Relationships *Internal:*	LearningWorks CE LearningWorks Leadership Team LearningWorks employees
Functional Relationships *External:*	Wintec | Te Pūkenga Finance Auditors External agencies and specialist providers Others as required
ACCOUNTABLE FOR	**SUCCESSFUL WHEN**
Finance Coordination	▪ Ensure accurate information is input into the current finance system [TechOne], CRM and any related documents. ▪ Ensure all billable work, completed projects, contracted services and recurring revenue are accurately captured and invoiced within agreed timeframes. Reconcile operational activity and contractual commitments against invoicing to identify and resolve omissions, discrepancies or delayed billing. ▪ Process all receivables for LearningWorks Ltd. ▪ Maintain accurate creditor and debtor records, monitor aged receivables and proactively follow up outstanding accounts, with material issues and collection risks reported to the CE. ▪ Liaise with Leads to maintain accurate job/project close offs with supporting discrepancies noted against job/training costing and reported to CE. ▪ Provide financial reporting to NZQA within specified timeframes, on their request, for compliance in conjunction with Lead. ▪ Prepare NZQA forms and collate information to return annual reports by 31 March each year. ▪ Support Auditor information required to complete annual report. ▪ Assist Wintec | CE with preparation of working papers and financial reporting to CE and Board. ▪ Reconcile job/project costs and facilitator/supplier invoices and where there are discrepancies follow up and ensure they are rectified, explained and reported on. ▪ Support the collation, reconciliation and posting of monthly PCard cycle. ▪ Review job, project and training costings to assess profitability, accuracy and adherence to agreed rates, with discrepancies and exceptions identified and reported to the CE for approval where required. ▪ Provide accurate contractor/supplier invoice payment on the 20th of each month (unless other arrangements are made).
Finance Advice	▪ Prepare and maintain financial reporting on sales, revenue, expenditure and pipeline performance, providing the CE with timely and accurate information. ▪ Monitor pipeline gaps and financial forecasts, identifying material changes, risks and opportunities. ▪ Work with Wintec Finance to review monthly financial results, analyse variances against budget and forecast, and ensure discrepancies are investigated and explained. ▪ Prepare financial information and commentary to support monthly management reporting and Board reporting requirements.

	▪ Support the preparation and regular updating of budgets, financial forecasts and cash flow projections. ▪ Undertake key financial reconciliations, including service-level agreements, projects, facilitators and Maths Mates commissions. ▪ Prepare and process required journals and financial adjustments. ▪ Provide practical financial analysis to support pricing, project profitability and commercial decision-making.
Documentation | Reporting	▪ Document all accounts processed in designated document formats and locations to ensure all processes are accurately documented, up-to-date and saved appropriately. ▪ Review and update costing templates and business models with CE on an annual basis to ensure they remain current. ▪ Provide all reporting as required and to agreed timeframes. ▪ Proactively simplify processes and reporting to support efficient financial tracking. ▪ Coordinate LearningWorks' month-end financial activities, ensuring reconciliations, adjustments and reporting information are completed accurately and within agreed timeframes. ▪ Identify opportunities to strengthen financial controls, improve reporting accuracy and simplify or automate routine financial processes.
Communication	▪ High quality, professional and collaborative relationships are built with all internal and external stakeholders. ▪ Ensure response (internal and external) times in communication, inquiries and actions are managed and maintained to agreed performance levels. ▪ Accountability is taken for establishing and building relationships across internal and external stakeholders. ▪ Maintain healthy relationships and effective communication with colleagues, clients and learners. ▪ Provide clear and transparent updates with a 'no surprise' approach. ▪ Use of tools for communication is professional and complies with policy and/or legislation. ▪ Checks for mutual understanding and dispels assumptions.
General	▪ Contributes to and supports team activities across the business. ▪ Accepts share of workload to help others and the team. ▪ Demonstrates respect towards other team members. ▪ Actively participates in the development and achievement of the LearningWorks culture, goals and performance standards. ▪ Prioritises and actions tasks based on importance through strong time management and proactive focus.
LearningWorks Culture	▪ Demonstrates an understanding and commitment to LearningWorks' purpose, vision, strategies, priorities and LearningWorks Way. ▪ Adheres to all LearningWorks policies, procedures and legislative obligations. ▪ Promotes equity and diversity in the workplace, builds mutual trust and treats kaimahi (employees) equitably, transparently, fairly and in a culturally appropriate manner. ▪ Has an understanding and alignment to Te Tiriti o Waitangi.

	▪ Contributes to the continuous improvement and development of systems, procedures, growth and service of LearningWorks.
Occupational Safety and Health	▪ Significant and new hazards in the area of responsibility are identified, controlled, documented and reviewed annually with reference to the Hazard Management Policy. ▪ Health and safety induction, work specific training and required certification is identified and completed. ▪ Emergency management information is known and participation in emergency procedures occurs. ▪ Work accidents and incidents are reported as soon as possible after occurrence; investigation reports are completed and recommendations considered.
Other Duties	▪ Performs other duties as may be reasonably required from time to time.

THE LEARNINGWORKS WAY	
WE KEEP IT REAL | KIA TIKA, KIA PONO	Adding value to organisations and learners throughout their journey. Kia pono, ki ngā hiahia o ngā kiritaki me ngā ākonga, i a rātou mahi katoa.
WE GET IT DONE | KA WHAI, Ā TUTUKI NOA	Making the best us of resources towards quality learning outcomes. Kia tika te whakamahi i ngā rawa, kia kounga tonu ai ngā mahi ako.
WE KEEP IT REAL | KA WHAI, KIA EKE PANUKU	Quality relationships, learning and measures. Mā te kounga on ngā mahi ako, te whakawhanaungatanga, me ngā paeru arotake i ā mātou mahi.

COMPETENCY SPECIFICATION	
Education / Training	▪ A relevant qualification in accounting, finance or business is desirable. Equivalent practical experience in financial accounting, reporting and financial operations will also be considered.
Experience	▪ At least 5 years' relevant experience in finance, accounting or a finance coordination role. ▪ Demonstrated experience in financial reporting, reconciliations, invoicing and accounts receivable. ▪ Experience preparing or contributing to budgets, forecasts and financial analysis. ▪ Proven ability to identify financial discrepancies, investigate variances and provide meaningful financial information to management. ▪ Experience using financial and accounting systems, with TechOne, CRM or WorkFlowMax experience advantageous. ▪ Experience improving financial processes, controls and reporting practices.
Typical knowledge, skills, and attributes	▪ High level of computer literacy and familiarity with Microsoft Windows environment, e.g. Word, Excel, Outlook, PowerPoint. ▪ Ability to effectively prioritise and execute tasks in a high-pressure environment. ▪ Able to exercise judgement in problem solving. ▪ Transparent, accurate and timely reporting. ▪ Experience working in a team-oriented, collaborative environment. ▪ Highly developed interpersonal skills with a demonstrated ability to relate to internal and external clients at all levels and an ability to develop working relationships. ▪ Excellent organisation and prioritisation skills that enable a range of tasks to be performed under competing demands whilst meeting the agreed outcome. ▪ Demonstrated ability to identify key issues and consider all perspectives, and be action orientated. ▪ Ability to show initiative and to work unsupervised. ▪ Ability and willingness to develop and implement effective operational processes and practices for efficiency and effectiveness. ▪ Ability to listen to others and respond in an appropriate manner. ▪ Ability to be innovative and to adapt to changing circumstances. ▪ Demonstrated ability to work with colleagues to resolve issues and meet agreed outcomes. ▪ Excellent written and oral communication skills. ▪ Ability to present ideas in business-friendly and user-friendly language. ▪ Strong Excel skills, including the ability to analyse, reconcile and present financial information accurately. ▪ Sound commercial judgement and the ability to interpret financial information, identify emerging issues and communicate findings clearly. ▪ Demonstrated ability to work independently, take accountability for financial processes and follow issues through to resolution.

KEY PERFORMANCE INDICATORS	
Performance will be assessed against the accuracy, timeliness and effectiveness of financial coordination, reporting and support. Specific reporting deadlines and performance measures will be agreed with the Chief Executive.	
Revenue & Billing	▪ All approved and scheduled billing completed accurately within agreed timeframes, with discrepancies identified and resolved.
Financial Reporting	▪ Accurate monthly financial information and commentary provided to the CE within agreed reporting deadlines.
Financial Reconciliations	▪ Key reconciliations completed monthly, with material discrepancies investigated and resolved or escalated.
Accounts Receivable	▪ Aged debtors reviewed monthly, with overdue accounts actively followed up and material risks reported.
Budgeting & Forecast	▪ Financial forecasts and budget updates completed within agreed timeframes, with material variances explained.
Financial Controls	▪ Financial records and supporting documentation maintained accurately, with identified control weaknesses addressed.
Process Improvement	▪ Opportunities to improve financial accuracy, efficiency and reporting are identified and agreed improvements implemented.