

## Position overview

<b>Position title</b>	Planning and Analysis Manager
<b>Business unit</b>	Enterprise Solutions
<b>Remuneration type</b>	Total Rewards
<b>Reports to</b>	Head of Business Planning & Performance
<b>Direct reports (role)</b>	Planning & Analysis Business Partners and Management Accountants
<b>Locations(s)</b> (Unitywater operates on Kabi Kabi, Jinibara and Turrbal country)	Flexibility exists to be based at any of four locations on the Sunshine Coast or Moreton Bay
<b>Success profile</b>	3.2 Data & Analytics Role Success Profile
<b>Delegation level</b>	Level 4

## Position purpose

The Planning and Analysis Manager will lead, manage and develop the Planning & Analysis Team responsible for evaluating and driving performance across the business. This will be achieved through the facilitation and management of the Enterprise and Business Unit strategic operations and programs across the organisation through the establishment of performance reporting and business improvement insights.

The position plays a leading role in defining and monitoring performance at all organisational levels, managing a dedicated team, and working with Executive Leadership, Senior Management and other teams across the organisation to ensure cross-functional alignment for the development and execution of corporate strategic goals and key performance indicators.

## Position accountabilities

Key functions of the role include:

### **Business Partnering & Leadership**

- Strategically partner with Leaders, to provide business focussed and strategic advice and support, using analytical insight, problem-solving and digital proficiency that will support the business.
- Provide guidance and coaching to the Analysts, and where required, the broader team to build and develop capability across the function to enhance our ability to add value for the organisation.

### **Performance Reporting**

- Establish and embed Unitywater Performance Framework (including roles, responsibilities) and evaluate performance management end to end. This includes:
- Lead the coordination and ongoing improvement of financial management reporting, budgeting and forecasting to support the business.

- Facilitate the continuing development of a hierarchy of performance and result indicators to drive business performance and accountability at strategic and operational level.
- Develop and maintain processes and systems for the establishment and monitoring of key performance indicators.
- Undertake monthly performance reporting and analysis across all levels of the organisation including providing advice and guidance to the Executive Leadership Team and Board.
- Manage the production and provide oversight and review Board and ELT performance reporting, annual and half yearly reports to Participating Councils and other financial management information to ensure high quality production with minimal errors and maximum value.
- Report and provide insights on Unitywater's Performance in comparison to industry peers.
- Proactively seek sources to benchmark Unitywater performance against relevant organisations.
- Lead, improve and manage enterprise and business unit level reporting and analytics frameworks and outputs that reflect the key drivers of performance of Unitywater, and provide insights into areas for improvement.
- Lead, coordinate and support a team approach to maintenance and improvement of management reporting & analysis systems and tools across Unitywater with a focus on provision of user friendly 'self serve' and automated systems.

#### ***Forecasts and Annual budgeting***

- Establish and maintain a rolling financial forecast process and system using driver-based calculations to provide business partners with forward looking insights, and reduce overall effort in the budgeting process.
- Manage the coordination and ongoing improvement of management reporting, budgeting and forecasting for business partners in line with reporting deadlines.
- Develop annual budget strategy and plans in consultation with the CFO and Head of Business, Planning & Performance.
- Oversee the management, co-ordination and delivery of the annual budget and five-year forecast.
- Oversee the management, co-ordination and delivery of regular forecasts and reviews in accordance with required timeframes.

#### ***Corporate Data Provision***

- Establish and lead the provision of key data, following enterprise data governance and management frameworks for Unitywater external performance reporting (for example, Annual Report, media releases, industry benchmark reporting, ABS surveys)

#### ***Investment Analysis***

- Support business units and management in the maintenance and improvement of investment governance frameworks.
- Support the improvement of investment governance tools in conjunction with the EPMO including investment governance frameworks, business case templates, initiative submission templates, financial evaluation model, post investment review templates and benefits realisation frameworks.

#### ***General***

- Meet all HACCP (Hazard Analysis Critical Control Point) [Leader to Remove function if not required].
- Meet relevant ISO standard [Leader to Remove function if not required].
- Support and role model the WH&S policies, procedures, and practices of Unitywater as amended from time to time.

- Participate in Unitywater safety audits and inspections to demonstrate visible safety leadership and participation.
- Such other relevant duties as required from time to time which would generally fall within the skill and knowledge requirements for this position.

## Key relationships

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Key working relationships internal and external to Unitywater are:

- Head of Business, Planning & Performance
- Executive & Senior Leadership Teams

## Capability requirements

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The requirements for the position are:

- CA / CPA
- Digital proficiency including experience with contemporary BI tools
- Proficiency in establishment of driver analytics
- Business process optimisation and automation
- Current C Class Drivers Licence.

Within the context of the duties and accountabilities described above, the ideal applicant will be someone who has:

- Leadership - the ability to establish a vision for the function and able to lead the team to that vision through clear goals and targets, regular communication to team and individuals and the team held accountable for performance.
- Relationship Building and Influence – the ability to build long term relationships with stakeholders and peers.
- Demonstrated financial planning, budgeting, financial modelling, investment evaluation, cost management skills.
- Significant, practical BI experience with demonstrable business benefits.
- Significant experience in particular with the Microsoft BI toolsets – PowerBI, DAX, Power Query, SQL
- Written and Oral Communication – the ability to effectively present complex information clearly in written or oral form
- Problem Solving / Judgement - The ability to resolve problems by using well developed analysis techniques, generating viable options and alternatives and making a decision.
- Developing people – the ability to build people capability and a high performing team

## After hours service

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This role will be required to participate in after-hours work and be part of an on-call roster as the need may arise to ensure the continuity of service to Unitywater's customers.

## One Unitywater Behaviours

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The One Unitywater Behaviours define how we work together at Unitywater. They guide our everyday interactions, influence how we make decisions, drive us to achieve our strategy and help us to create our One Unitywater culture together.

*Create the Future* is about seeking to learn through new ideas and innovations, planning strategically, adapting to challenges and steering Unitywater towards a sustainable future.

*Care Together* is about fostering a culture of safety, collaboration, and customer-focused service. It's about creating a workplace where people feel valued, work inclusively and deliver outstanding outcomes for our customers.

*Own It* is about taking responsibility for our actions, being transparent and accountable, and striving for excellence in everything we do. It's about demonstrating integrity, welcoming feedback and ensuring we follow through on commitments.