

Position Description

Position title:	Pricing & Financial Performance Manager
Date established:	October 2023
Reports to:	Head of Finance
Direct reports:	Nil
Employment status:	Ongoing contract, full-time

Background

The Sax Institute is an independent, not-for-profit organisation that improves health and wellbeing by driving better use of evidence in policies, programs and services.

The Institute has an international reputation as an Evidence Specialist, and nearly 20 years' experience in translating research findings into policy drawing on our own expertise as well as that of our more than 50 member organisations. We work with governments, health organisations, research organisations and a network of experts nationwide to analyse policy problems and find the best evidence-based solutions.

Program Area / Division – Finance

The role of Pricing & Performance Manager sits in the Finance team. The team is part of the Corporate Services group, which encompasses Finance & Shared Services; Human Resources; Information Technology; Commercial and Facility Management.

Purpose of position

Reporting to the Head of Finance, the Pricing & Financial Performance Manager will work closely with the Executive team and Program leaders to strengthen the financial sustainability of the Institute. This will be achieved through co-designing opportunities to transform the pricing and margin structures of our services as well as contributing to accurate pricing for future funding opportunities, projects, budgets and forecasts.

The Pricing & Financial Performance Manager will be responsible for compiling and analysing data, identifying opportunities, driving solutions and making recommendations to improve pricing and margins, in line with the value propositions the Institute offers.

This position will focus on various aspects of financial management, with an emphasis on cost analysis, revenue optimisation, financial strategy, estimating and quoting for services, financial acquittals, and the essential task of finance and project management system implementation, all while staying true to our mission.

Key accountabilities

Key accountabilities	Performance expectations
Pricing Strategy	<ul style="list-style-type: none"> Develop pricing strategies for our services that align with their value proposition to our stakeholders in collaboration with program managers. Ensure that pricing is competitive, sustainable, and reflective of the impact we deliver.
Project Financial Performance	<ul style="list-style-type: none"> Collaborate with Program Directors to estimate the costs and resources required to deliver our services. Develop accurate quotes for services provided, ensuring transparency and value to stakeholders. Analyse the financial performance of programs, initiatives, and projects to assess their impact and identify opportunities for optimisation. Develop strategies for diversifying funding sources, managing grant applications, and optimising revenue streams, considering the value we provide to our stakeholders. Manage financial acquittals, ensuring that all funds are used in compliance with grant agreements and accurately reported to funding partners.
Business Partnering	<ul style="list-style-type: none"> Collaborate in the development and management of the organisation's budget and forecasts, ensuring alignment with our mission and integrating pricing and quoting strategies into financial planning. Collaborate with Program Directors to assess resource needs, allocate budgets, and identify cost-effective strategies to ensure the efficient use of available resources. Contribute to the business partnering approach between Finance and budget owners to increase financial literacy and data driven decision making across the organisation. Create and maintain financial models that project income and expenses, allowing the organisation to make informed decisions about resource allocation and future growth.
Systems & Reporting Framework	<ul style="list-style-type: none"> Actively participate in system transformation projects relating to finance, project accounting, pipeline management and project management to ensure appropriate corporate data is gathered to inform decision making. Influence cultural transformation across Finance by fostering a mindset of continuous improvement and collaboration. Ongoing management and maintenance of the finance systems, driving engagement, stabilisation and optimisation of the newly implemented finance, project and pipeline systems. Collaborate to develop multisystem reporting tools to support the business e.g. Power BI reporting

Qualifications, Skills, Experience and Personal Qualities - Selection Criteria

Essential

To be successful the Pricing & Performance Manager should demonstrate the following technical and behavioural competencies:

- Professional accounting qualification (CA or CPA qualified)
- Advanced knowledge of Microsoft Excel
- Proven experience in pricing strategy development, performance analysis or related roles (minimum of 5 years)
- Solid understanding of pricing methodologies, market dynamics, and competitive landscapes
- Demonstrated skills and experience within business intelligence (e.g. Microsoft Power BI)
- Strong analytical skills with the ability to interpret complex data and draw actionable insights
- Excellent communication and presentation skills, with the ability to convey complex concepts to both technical and non-technical stakeholders
- Strong project management skills, with the ability to prioritize and manage multiple initiatives simultaneously
- Demonstrated relationship management, negotiating and influencing skills
- Strong business acumen and a strategic mindset.

Desirable

- Experience working in the Not for Profit, University and Research Sector will be highly regarded

Challenges

- Diversity of programs of work at the Institute

Key stakeholders and relationships

- Executive Team
- Program Directors and team members
- Finance & Business Transformation team