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# CANDIDATE BRIEFING DOCUMENT

CHIEF FINANCIAL OFFICER  
COMMUNITY BUSINESS BUREAU  
JUNE 2024

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## Overview: About CBB

### OUR STORY

Community Business Bureau Inc (CBB) was formed on 1 July 1995, as a wholly independent incorporated organisation, evolving from the restructuring of the Spastic Centres of South Australia (now known as SCOSA, Cara and CBB). Through restructuring, separate agencies were formed and CBB was established to service the administration requirements within the community services sector, in particular to meet their payroll and financial needs.

Today, Community Business Bureau Inc (CBB) is Australia's' only national not for profit, PBI / charitable Salary Packaging and Business Advisory and recognised Australian Social Enterprise.

Our mission is to develop the capacity and sustainability of not for profits. We undertake activities that support and enable charitable organisations to provide benevolent relief in the areas of indigenous services, aged care, disability, health, welfare, and other community and human support services to people in need.

We have built a reputation as a trustworthy, ethical, and socially conscious service provider. Our clients choose to partner with us because we add value not only for their employees, but also the organisation itself.

It's CBB's empowering, supportive, and transparent partnerships that keep our clients coming back year after year.

- ▶ 1,100+ organisations across the nation partner with CBB
- ▶ 300+ First Nations organisations partner with CBB
- ▶ 85 staff Australia wide employed by CBB
- ▶ Turnover in excess \$11m / Over \$650m in client / customer funds handled annually
- ▶ 1,300+ novated leases under management / \$30m+

CBB supports not for profit organisations to attract, develop, and retain good people elevating the quality of life of people in need through a range of service offerings such as, salary packaging, novated leasing, rewards program, trusted advisor services, community development and business grants and scholarships.

CBB is proud of its social impact, delivering meaningful growth and projects, creating stronger outcomes not only for our not-for-profit sector, but also for its incredible staff who work hard to improve lives all over Australia.



## OUR REACH AND IMPACT

When the not-for-profit workforce has well-developed business skills, and knows how to apply them for social impact, they can get more done for communities in need.

For more than 20 years we've been operating as a not-for-profit social enterprise, growing to a team of over 80 staff and serving more than 1,100 organisations around Australia - from small groups working at the "grass roots", to large, established organisations.

We intend to continue grow our national footprint and increase our impact and reach to help even more not for profit organisations do better business.

## OUR VISION

A thriving not for profit sector that is achieving its social objectives.

## OUR PURPOSE

Champion better business practices to deliver social impact.

## OUR VALUES

CBB staff will always be ethical in our dealings with clients and stakeholders. We shall offer and deliver services in a manner which reflects strong commitment to the following values:

- ▶ Respect
- ▶ Integrity
- ▶ Service
- ▶ Empowerment

For more information visit [www.cbb.com.au](http://www.cbb.com.au)

## Message from our CEO



I am excited to extend an invitation to you to apply for the Chief Financial Officer (CFO) position at CBB. As the CEO, I am passionate about our mission and am looking for a dynamic leader who shares our commitment to driving positive change through service excellence.

At CBB, we believe in the power of purpose-driven work. Our organisation is dedicated to delivering exceptional services to our clients, and our CFO will play a crucial role in shaping our financial strategy, ensuring sustainable growth, and maintaining our strong financial health to deliver on our social goals.

If you have a passion for our mission and values, with a commitment to making a difference then we'd love for you to apply.

As our CFO, you will have the opportunity to work closely with our executive team, contribute to our strategic planning, and lead a dedicated finance team. You will be instrumental in driving our financial strategy, managing risks, and identifying opportunities for growth, innovation and social impact.

I am so proud of our amazing team and our achievements. What we do really matters. If you are a visionary financial leader looking to make a meaningful impact, I encourage you to apply for this exciting opportunity. Join us at CBB and be part of a team that is dedicated to creating a positive difference in the community.

Michael Elias  
CEO

## The Advertised Role

### CHIEF FINANCIAL OFFICER

- **Unique Social Enterprise within the NFP Sector**
- **Key Strategic Role to underpin CBB's Social Impact**

Community Business Bureau Inc (CBB) is Australia's' only national not for profit, PBI / charitable Salary Packaging and Business Advisory organisation. It is a recognised Australian Social Enterprise with 1,100+ organisations across the nation partnering with it.

Its mission is to develop the capacity and sustainability of fellow not for profits. CBB undertakes activities that support and enable charitable organisations to provide benevolent relief in the areas of indigenous services, aged care, disability, health, welfare, and other community and human support services to people in need.

With clear strategic directions in place and the backing of a cohesive Board of Directors, CBB is positioned and ready to build on past success and create new and exciting opportunities for growth. This has resulted in the decision for CBB to appoint a Chief Financial Officer, reporting to the Chief Executive Officer and enhancing the diversity of the CBB Executive.

This is a key strategic role in developing, enhancing and providing effective and sustainable business systems underpinning the successful financial operations of CBB.

The CFO's primary responsibilities are steering financial strategy, ensuring fiscal health, and driving profitability to achieve CBB's long-term social impact goals.

The successful candidate will have relevant tertiary qualifications in Accounting, Finance, Commerce or Economics and will have CA or CPA qualifications with demonstrated success and experience in a similar role within salary packaging / novated leasing and/or financial services.

**For a copy of the position description visit the VUCA website [www.vuca.com.au/CBB](http://www.vuca.com.au/CBB), and for a confidential discussion regarding the position, please contact VUCA Associate, Ms Pat Williams on 0438 388 530. Applications, including your current CV and a letter of introduction, are to be forwarded in Word format to [CBBCFO@vuca.com.au](mailto:CBBCFO@vuca.com.au). Applications close Friday 5th July 2024.**

## POSITION DESCRIPTION

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<b>Reporting to:</b>	CEO
<b>Direct Reports:</b>	4
<b>Department:</b>	Corporate Services
<b>External relationships:</b>	Clients, Stakeholders, Advisors, Banks, Lawyers, NFP Community Services sector agencies

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CBB is a unique social enterprise with a clear purpose to help the not-for-profit sector achieve its social objectives. Servicing not for profit organisations all over Australia, CBB has over 80 staff members based in our head office in Adelaide and in our interstate offices. We are committed to the continuing development of products and services to better serve the not-for-profit sector.

As a well-established provider of salary packaging and business consulting services to the not-for-profit sector; robust strategic planning, enhanced client and stakeholder engagement and an ongoing commitment from staff drive a forward- thinking approach to further developing the CBB business.

With clear strategic directions in place and the backing of a cohesive Board of Directors, CBB is positioned and ready to build on past success and create new and exciting opportunities for growth.

### Our strategic intent

*CBB plays an integral role in the not-for-profit sector achieving its social objectives. We do this by being a leading social enterprise providing personalised, professional services to Australian not-for-profits.*

### Our values

- ▶ Respect
- ▶ Integrity
- ▶ Service
- ▶ Empowerment

### Position Purpose

This position has a key strategic role in developing, enhancing, and providing effective and sustainable business systems to underpin the successful operations of CBB.

- ▶ Excellence in customer service to both internal and external stakeholders is required. Strategic responsibilities of the role include guidance on the long-term sustainability of CBB's financial and business capacities.
- ▶ To maintain and coordinate high quality financial management, compliance, quality assurance, human resource management and other corporate functions to enable CBB to continue to perform above expectations.

### Position Level Descriptor

The CFO operates under the direction of the CEO and is responsible for the management and provision of financial, risk, workforce (human resources), property/ assets, procurement and other corporate services supporting CBB operations.

## Line Manager

The CFO reports to the Chief Executive Officer, and as a member of the CBB Executive Management Team, this position will support a solution focused team approach across all organisational operations.

## Special Conditions

- ▶ Some inter/intrastate travel and out-of-hours work may be required.
- ▶ The appointment is subject to a Criminal History Check.

## Primary Responsibilities

### Financial Administration and Reporting

- ▶ Take responsibility for CBB's financial management, budget, accounting, payroll, internal audit, risk management and quality assurance functions.
- ▶ Establish and review accounting and financial information systems, governance and internal controls to safeguard CBB's resources.
- ▶ Manage contractual obligations across corporate services.
- ▶ All statutory and compliance requirements are fulfilled.
- ▶ Lead and supervise the work of staff in the corporate department.
- ▶ Ensure the preparation of various financial statements and reports including preparing and monitoring CBB's budget, preparing accounts for annual audit and acquittals for funding bodies.
- ▶ Act as the secretariat for the Finance, Risk and Audit Committee.
- ▶ Prepare and provide oversight to policy and procedures focused on financial management, investment, risk, and governance.
- ▶ Ensure accurate financial reports are prepared for the CEO, Board, other team members, funding bodies, ATO and other government departments as required.
- ▶ Identify and explore where there might be opportunities to enhance CBB's financial sustainability
- ▶ Assist in grant seeking and in the preparation of grant applications.

### Workforce

- ▶ Work with the manager of HR in the development of CBB's workforce strategy.
- ▶ Stay up to date with relevant Industrial Award and Industrial Relations legislation/ regulations and ensure they are implemented in CBB including workplace health and safety.
- ▶ Manage, analyse, and respond to workforce metrics including cultural environmental surveys.
- ▶ Assist the CEO and senior leaders with aspects of human resource management
- ▶ In conjunction with the leadership team, proactively work to manage risks including Workplace Health and Safety.

### Risk / Compliance & Contract Management

- ▶ Work with the CEO to ensure CBB's compliance with relevant legislation, standards, and quality systems as part of ongoing accreditation.
- ▶ Undertake activities in line with legislative and statutory requirements including the requirements of regulators and funding bodies.
- ▶ Monitor and review contracts and agreements with a variety of stakeholders and prepare reports as required.
- ▶ Ensure CBB complies with all workplace health and safety legislation and obligations



## Organisational Systems

- ▶ Oversee and develop organisational systems that support compliance, effective operations, risk management and accreditation.
- ▶ Contribute to continuous improvement of CBB's financial and human resource policies, procedures, systems and practices.
- ▶ Assist the CEO and Board with aspects of their governance role and requirements.
- ▶ Undertake other duties, as required in support of CBB's Strategic Plan.

## Property Management

- ▶ Ensure the overall management, repairs and maintenance of Head Office and other assets.

## Skills/ Knowledge/ Experience Profile

- ▶ Demonstrated commitment to the values that underpin CBB's purpose.
- ▶ Appropriate qualifications and excellent understanding of accounting and financial management practices, reporting, governance and accountability.
- ▶ High level of IT literacy, including a good working knowledge of the Microsoft Office suite of applications.
- ▶ Advanced analytical, conceptual, and problem-solving skills, with the ability to identify both strategic and operational issues, and to think laterally and creatively in addressing them.
- ▶ Excellent written and verbal communication skills, including the ability to compile and prepare financial reports, budgets, tenders, contracts, and associated documents.
- ▶ Advanced time management skills, while being comfortable working both autonomously and together in leading a small team where there may be competing demands, complex tasks and changing priorities.
- ▶ Extensive knowledge of statutory, legal and regulatory frameworks relevant to the community services sector.
- ▶ Proven leadership and capacity to work with, and as, a member of a small team as well as build effective relationships with people across the community services/ Not for Profit (NFP) sector.
- ▶ Ability to use initiative, to adapt to change, to seek and embrace feedback, to approach work with enthusiasm, flexibility, and creativity while displaying a commitment to high quality standards.
- ▶ Awareness of issues impacting NFP sector.

## Qualifications

This role requires a relevant Degree which is likely to be in Accounting, Finance, Commerce or Economics and the person will also have either a CA or CPA affiliation, together with a minimum 10 years' experience in a similar role.

## Living & Working in Adelaide, South Australia

Adelaide is one of the most liveable cities on the planet, in fact it's the third most liveable city in the world. It is well known for its arts, festivals, fine foods and wine, retail and dining experience and spirit of entrepreneurship and innovation. It has an advanced economy, world class universities and a flourishing multicultural heritage. Adelaide is the traditional home of the Kurna people and has a strong indigenous culture today.

### LIFESTYLE

Adelaide is known for its **Mediterranean style climate**, where the weather is pleasant and moderate most of the year. Year-round big blue skies mean average winter temperatures of 16 degrees Celsius (°C) and 28°C in summer. Hot days can be real sizzlers and easily reach 40°C though!

Adelaide is a city that offers the physical and emotional space to breathe. There is a sense of freedom here – of expression, of movement, of thought. With a **diverse and eclectic array of accessible experiences**, it's a city that allows time for immersion, paired with a sense of space and freedom that actively encourages true indulgence.

The Adelaide Hills which are home to many villages, towns, wildlife parks and natural resources to explore, are less than half an hour drive from the city centre. You'll never be far away from some of the most **pristine beaches** and water sanctuaries in the world, with almost 30km of beaches bordering Adelaide. Our beaches are famous for the beautiful waters and wide sandy foreshores. Beachside areas like Glenelg, Brighton and Henley Beach are only 15-minute drives from the city and offer **cosmopolitan hearts with retail and dining opportunities**. Within short drives from the city centre are Port Willunga where you can scuba dive in natural and man-made reefs, Port Adelaide where you can frolic with dolphins and St Kilda where you can wander the mangroves and natural reserves, also home to dolphins and other Australian fauna.

A number of international measures rate metropolitan Adelaide highly for liveability, quality

of life and cost of living. The Economic Intelligence Unit undertakes an annual Liveability Ranking and Overview of 140 cities around the world and Adelaide has most recently ranked 3rd in the world. The Property Council of Australia undertakes its own annual survey on liveability of Australia's top 10 biggest cities. In this survey Adelaide is ranked second only to Canberra, our nation's capital, and above all other capital cities.

### REGIONAL EXPERIENCE:

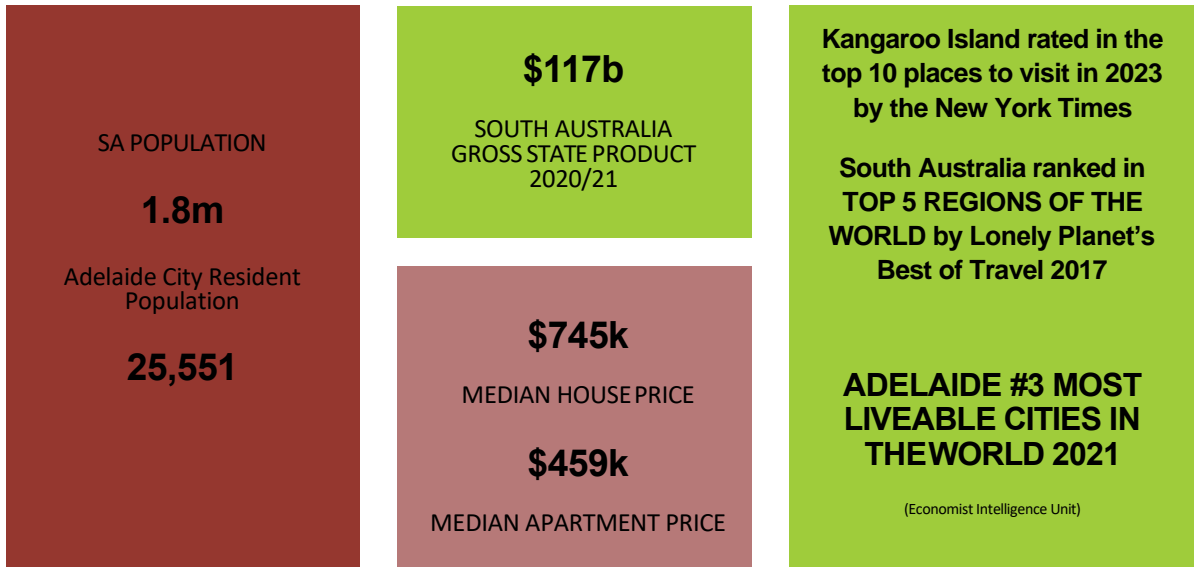
**The regions surrounding Adelaide offer a unique experience with gourmet food offerings, internationally renowned wine, villages to explore and wildlife and natural attractions.**

Adelaide is a city that lives well beyond its conveniently designed square mile epicentre, flowing seamlessly into world-famous wine and food regions such as Barossa, just an hour's drive north, or coastal escapes in the Fleurieu or Yorke Peninsula. You'll be spoilt for choice.

Travel another hour north and you'll reach the Clare Valley, which is famous for its Rieslings. The Adelaide Hills has some stunning whites and there's McLaren Vale and Langhorne Creek on the Fleurieu Peninsula – about an hour's drive south of the city. Drive yourself or join a guided tour of Adelaide and its surrounds - the choice is yours. Take a road trip and discover the reds from the Coonawarra on the Limestone Coast.

Kangaroo Island is an iconic destination, just two hours' drive and a short ferry ride south of Adelaide. It has pristine beaches, unique wildlife, awesome sunsets and fantastic food and wine.

## South Australia & Adelaide, Fast Facts



### One of the world's most liveable cities

Adelaide offers a relaxed, easy-going lifestyle, and was rated as the world's 3rd most liveable city in the world in 2021 (Economist Intelligence Unit). It is located in a beautiful region of South Australia, which is also ranked in the top 5 of the world's regions.

### Australia's most affordable mainland capital

Your money will go much further in Adelaide. Studies show it costs 18% more to live in Melbourne and 30% more to live in Sydney than Adelaide. Adelaide is around 11% cheaper than Brisbane and Perth, meaning you will have more money to discover Australia during your weekends and holidays.





## Contact Information

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**Applications close Friday 5th July 2024.**

## Important Information

Please note that VUCA Trusted Advisors believes that while the information contained in this document is true to the best of the Company's knowledge at the time of writing, such information may change without notice. Further, the information herein is the property of the Company and must not be published or attributed unless explicitly agreed.