



Ngā Kōrero e pā ana ki te Tūranga

Job Description

Principal Advisor, Investment Management

Business Group	Te Pou Rangatōpū Corporate
Location	Wellington
Salary band	A9

Mahi i roto i te Ratonga Tūmatanui | Working in the Public Service

Ka mahitahi mātou o te ratonga tūmatanui kia hei painga mō ngā tāngata o Aotearoa i āiane, ā, hei ngā rā ki tua hoki. He kawenga tino whaitake tā mātou hei tautoko i te Karauna i runga i āna hononga ki a ngāi Māori i raro i te Tiriti o Waitangi. Ka tautoko mātou i te kāwanatanga manapori. Ka whakakotahingia mātou e te wairua whakarato ki ō mātou hapori, ā, e arahina ana mātou e ngā mātāpono me ngā tikanga matua o te ratonga tūmatanui i roto i ā mātou mahi.

In the public service we work collectively to make a meaningful difference for New Zealanders now and in the future. We have an important role in supporting the Crown in its relationships with Māori under the Treaty of Waitangi. We support democratic government. We are unified by a spirit of service to our communities and guided by the core principles and values of the public service in our work.

Mō ētahi atu kōrero hei whakamārama i tēnei kaupapa, haere ki | You can find out more about what this means at [Role and purpose - Te Kawa Mataaho Public Service Commission](#).

To Mātou Aronga | What we do for Aotearoa New Zealand

At Te Tāhuhu o te Mātauranga | Ministry of Education, delivering our purpose makes a real difference to all ākonga of Aotearoa:

He mea tārai e mātou te mātauranga kia rangatira ai, kia mana taurite ai ōna huanga
We shape an education system that delivers excellent and equitable outcomes

We fulfil our purpose by:

- delivering services and support nationally, regionally and locally to and through the education sector and in some cases directly to ākonga and whānau
- shaping the policies, settings and performance of the education system so that it is well placed to deliver equitable outcomes for ākonga and their whānau, from early learning through tertiary.

Tēnei Tūranga | About the role

The Principal Advisor, Investment Management leads the development, consolidation and use of the Strategic Financial Plan. This is to advise the CFO, business groups, the Ministry's Leadership Team and the Treasury regarding the financial outlook of each of the Ministry's appropriations and planned investment/support related planning and prioritisation to ensure a sustainable long-term financial roadmap supporting the Ministry's achievement of its strategic objectives.

The Principal Advisor will also partner with the Strategy and Planning team, group planning functions and Finance Managers to build and manage a Long-Term Investment Plan that combines the strategic plans of each of the business groups within the Ministry.



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Advice will reflect the strategic intentions of the Ministry captured in the financial modelling and implications of decisions on individual appropriations to facilitate recommendations on the costing allocations for each appropriation to support the long-term sustainability of the financial plans.

The person in this role will also support continuous improvement of the way the Ministry frames and costs its services and how this information is used within the Ministry's investment management framework.

Ngā Haepapa | Accountabilities

As a Specialist within Te Tāhuhu o te Mātauranga | the Ministry of Education you will:

- Share specialist knowledge across the organisation and with stakeholders, working with others to inform operational level decision making.
- Contribute to an effective team with a positive approach to the work environment that encourages and supports high performance, collaboration and problem solving.
- Lead the resolution of issues, identifying risks and solutions to protect and enhance the integrity and reputation of the Ministry.
- Lead or contribute to the development and implementation of innovative and fit-for purpose solutions and frameworks for current and future challenges.
- Develop and use data and insights to make evidence-based decisions and recommendations on operational issues.
- Build capability in others through coaching, quality assurance, and proactively sharing knowledge and expertise.
- Support the team efforts in developing and managing the framework for service costing, including corporate cost allocations through insights gained working with the management accounting team to understand the inputs and cost drivers, outputs and outcomes.
- Encourage excellence in customer service and the development of financial management best practice across Finance Planning and Performance Team.

As the Principal Advisor, Investment Management you will:

- Lead the development of the three year capital intentions plan and the development of subsequential reporting and continual enhancements to the plan.
- Work with the External Reporting team to ensure that the Finance Planning and Performance Team contribute to the annual planning processes (Baseline Updates/Estimates) and that they are done in an accurate and timely manner.
- Ensure that Finance Managers provide analysis and insight to help understand, interpret and improve financial performance, and minimise financial risks to appropriations e.g. trends, comparatives with other years and like business areas, ratios, incorporation of non-financial metrics.
- Work with Finance Managers to collate the planning functions across the Ministry and ensure that the strategic intentions of the business groups are captured in financial planning.
- Provide direction on the interpretation and application of the Ministry's financial policies, procedures, internal controls, and general accounting principles to support investment decision making through the Ministry Delivery Framework.
- In conjunction with the Enterprise Project Management Office and business teams provide support for investment proposal development, their assessment and business case evaluation.
- Foster a continuous business improvement culture within the team to deliver transactional and process efficiencies to stakeholders.



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- Communicate clearly the financial outlook for the Ministry under a range of scenarios through the Strategic Financial Plan. Demonstrate the effect of new initiatives, changes to cost drivers, risks and issues on the Ministry's activities.
- Demonstrate options to manage any funding priorities, potential solutions and associated risks for both capital or operating expenditure, through scenario-based modelling to show an overview of the projected operating and capital base impacted by the various proposals.
- Report on strategic financial management issues to the CFO, business groups and the Ministry's Leadership Team, including advice on the economy, efficiency and effectiveness of the Ministry's activities and investments, and the sustainability of its operating model.

You will make decisions in accordance with the Ministry's policies and delegations' framework.

Wheako | Experience

To be successful in this role you will have the following experience:

- Experience in a complex and dynamic organisation
- Experience in building relationships and partnerships to achieve shared outcomes.
- Tertiary qualification in Finance, Commerce or Business
- Experience in effectively using and interpreting complex financial models
- Understanding of investment planning whether through operating or capital investment.

Ngā Āheinga | Capabilities

To be successful in this role you will have the following capabilities and competencies:

- A track record of bringing people together and leading, coaching and mentoring others to achieve outcomes, working across an organisation using a relationship approach that results in the effective provision of services.
- A proven ability to use data and insights to identify trends, risks and opportunities, to influence and guide organisational and system-level decision making through the provision of financial management information.
- A good understanding of public sector planning, performance reporting and financial management
- Experience providing strategic commercial analysis in a large organisation to senior management.
- A demonstrated ability to innovate using best practice financial analysis.
- Proven experience in working within culture of continuous business improvement.
- A commitment to ongoing personal and professional development.



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Tātai Pou | Our Cultural Competency

Tātai Pou is our Māori Cultural competency framework. It has been aligned and is complementary to the Māori Crown Relations Capability Framework (MCR). Tātai Pou is designed to support our people and organisation to give effect to the articles of te Tiriti o Waitangi in our work. The work-based capabilities have four focus areas and describe four levels of competency (high, consolidation, developing and essential) that enable us to deliver our partnership approach so that Māori enjoy and achieve educational success as Māori.

Pou Hono Valuing Māori	Developing
Pou Mana Knowledge of Māori content	Developing
Pou Kipa Achieving equitable education outcomes for Māori	Developing
Pou Aroā Critical consciousness of racial equity for Māori	Developing

Leadership Success Profile - Te Kawa Mataaho | Public Service Commission

Leadership matters. Strong leadership at every level in the Public Service will transform the experiences of New Zealanders. The Leadership Success Profile establishes “what good looks like” for leadership at all levels. Information about how the Leadership Success Profile applies to this role is available on the Ministry’s intranet.

Ngā Whakaaetanga | Approvals

Date Reviewed and Approved	June 2025
Approved By	HR Advisory