

# Karen Long

## Profile

I am an enthusiastic, approachable, organised, and efficient person who thrives on being involved with organisations that make a real difference to Aotearoa, its residents, and its many visitors. A qualified Chartered Accountant With fifteen years of post-qualification experience in both practice and industry, I have enjoyed exposure to a broad range of industries, clients, and tasks.

- Experienced leader with a successful background in the delivery of multiple / complex projects within set timeframes, budgets and to a high standard of quality
- Ability to establish, maintain and develop strong relationships with colleagues, clients, and other stakeholders
- Range of board experience/exposure

## Education, Qualifications and Memberships

- NZ regional councillor (Chartered Accountants Australia and New Zealand) – 2023 to present (further detail below)
- Member of the Scholarships Committee of Te Wānanga o Aotearoa – 2022 to present (further detail below)
- Chair of The Green Lab (Greening the Rubble Trust) – 2021 to present (further detail below)
- Member of the Female Focus Champions Group (Sub-committee of Chartered Accountants Australia and New Zealand) – 2021 to present (further detail below)
- Chair of the Canterbury/Westland CAANZ (Chartered Accountants Australia and New Zealand) Local Committee – 2021 to 2023 (Member since 2019 - further detail below)
- Director of Te Rautiaki Mātauranga (Academic Board) of Te Wānanga o Aotearoa – 2020 (further detail below)
- Te Pōkairua Reo (Rumaki) (Te Kaupae 6) - New Zealand Diploma in Te Reo (Rumaki) Level 6 – 2022
- Member of Institute of Directors - 2021
- Member of ACAMS (Association of Certified Anti-Money Laundering Specialists) – 2018
- Fellow of ICAEW (Institute of Chartered Accountants in England and Wales) – 2017
- Member of CAANZ (Chartered Accountants Australia and New Zealand) - 2015
- Member of ICAEW (Institute of Chartered Accountants in England and Wales) – 2007
- Bachelor of Arts in Mathematics with Financial Management from University of Sheffield (UK) – 2004

## Career Detail

### Chartered Accountants Australia & New Zealand (CA ANZ) – Regional Councillor      **January 2023 to Present**

Chartered Accountants Australia and New Zealand (CA ANZ) represents more than 128,000 financial professionals, supporting them to make a difference to the businesses, organisations, and communities in which they work and live.

The NZ Regional Council provides input on strategic policy and member issues. We:

- Provide advice to the Board through the Chartered Accountants ANZ Council and management.
- Communicate on the Board's strategy and matters of significance for and to members.
- Assist the Board in raising and maintaining the public profile of Chartered Accountants ANZ in its region.
- Implement processes within the relevant region to attract and retain suitable regional council members.

### Te Wānanga o Aotearoa – Member of the Scholarships Committee      **October 2022 to Present**

Te Wānanga o Aotearoa (TWOA) is New Zealand's second largest education provider and provides a uniquely Māori learning environment for everyone.

As a member of the Scholarships Committee, I am a key part of the decision making in relation to the scholarships on offer as well as the successful recipients each year.

The Green Lab – Chair of The Green Lab

**May 2021 to Present**

The Green Lab creates urban green spaces that support strong social connections and promote wellbeing in Ōtautahi. The Green Lab put community, wellbeing, and environmental sustainability before profit.

Until October 2021 I was a Trustee contributing strategic, risk and financial advice as well as chairing the Finance Subcommittee. In October 2021, I was appointed as Chair.

I am also a signatory on the bank account and prepare the annual financial statements for filing with Charities Services.

As Chair of the Trust, I lead the group and ensure that we:

- Are always acting within our kaupapa and charitable purpose
- Health & safety is treated as a priority
- Are providing the level of support that management require

Female Focus Champions Group (Part of CA ANZ) – Member

**July 2021 to Present**

The Female Focus Champions Group is a Trans-Tasman group of female Chartered Accountants representing all regions of NZ and Australia. I am the South Island representative.

We meet every two months and discuss a range of matters that are female focussed. We are strong advocates for gender pay equity and created a “Gender Gap Playbook” which has been released by Chartered Accountants Australia and New Zealand.

Te Wānanga o Aotearoa – Director of Te Rautiaki Mātauranga (Academic Board)

**October 2020 to Present**

As a Director of Te Rautiaki Mātauranga, I offer the taura (student) voice as well as my experience in audit and risk. Te Rautiaki Mātauranga has the principal responsibility to:

- Promote, maintain and monitor educational quality in accordance with the Education Act 1989
- Advise on indigenous educational directions of TWoA
- Promote the advancement of indigenous body of knowledge that contributes to rangahau and to regional and national Māori, whānau, hapū and iwi development
- Oversee and monitor the development of all educational activities of TWoA
- Provide regular reports on its activities to Te Mana Whakahaere (TWoA Council/Board)

Chartered Accountants Australia & New Zealand (CA ANZ) – Local Committee Chair

**January 2019 to Present**

Chartered Accountants Australia and New Zealand (CA ANZ) represents more than 128,000 financial professionals, supporting them to make a difference to the businesses, organisations, and communities in which they work and live.

As Chair of the Local Committee, I lead the group and endeavour to:

- Provide input on local members segments, needs and preferences
- Identify local emerging issues
- Identify local emerging talent
- Facilitate access to local networks

**Hellers Limited – Financial Controller**

**November 2021 to Present**

Hellers Limited is NZ's leading brand of sausages, deli meats, bacon, ham and much more and employs over 550 staff across Christchurch and Auckland. As Financial Controller, I have seven direct (plus seven indirect) reports across NZ and Australia and oversee the delivery of accurate financial information, taxation compliance and external relationships with the banks, auditors and more for the group. Within this role I am:

- The lead of the high functioning finance team
- Responsible for the oversight of the preparation of all monthly and quarterly results
- Responsible for the timely preparation of the annual financial statements
- Responsible for the timely and accurate filing of all tax obligations
- Key point of contact for the CFO
- Key point for any complex accounting issues

My key achievements include:

- Leading an Accounts Payable automation project (including company-wide training)
- Leading a successful ERP change
- Leading a cohesive, high performing team that has grown substantially

**BT Mining Limited / Bathurst Resources Limited – Financial Accounting Manager**

**June 2019 to October 2021**

Bathurst Resources Limited (65% shareholder of BT Mining Limited) is an ASX listed company and New Zealand's largest special coal company. As Financial Accounting Manager, I had two direct (plus four indirect) reports and was responsible for the timely delivery of financial information, taxation compliance and the management of the balance sheet for both companies. On a daily basis, I liaised with staff member across a number of sites and external parties in order to establish and maintain a positive working relationship. Within this role I was:

- The lead of the Financial Accounting team, responsible for coaching, mentoring, and, developing all team members
- Responsible for the preparation and collation of monthly reconciliations
- Responsible for the oversight of fixed asset and inventory management
- Responsible for the timely preparation of the annual financial statements
- Responsible for the timely and accurate filing of all tax obligations
- Key point for any complex accounting issues
- In attendance of the Board meetings

My key achievements include:

- Leading the successful project to implement NZ IFRS 16 on time and to budget
- Leading an Accounts Payable automation project (including company-wide training)
- Maintaining strong working relationships with internal and external stakeholders whilst working remotely
- Being superuser of the new online expense claim system
- Implementation of rolling inventory counts (including training to staff on site)

**Otākaro Limited – Financial Accountant**

**August 2018 to June 2019**

Otākaro Limited is a Crown owned entity responsible for the delivery of Anchor Projects in central Christchurch and divesting the balance of land.

As Financial Accountant, I was responsible for the timely delivery of financial information and the management of assets. On a daily basis, I liaised with other staff members and external parties in order to establish and maintain a positive working relationship. Within this role I was:

- Solely responsible for the preparation of the annual Business Plan, Statement of Intent and Statement of Performance Expectations

- Responsible for the preparation and presentation of monthly finances to the Chief Financial Officer and Board of Directors using Xero
- Key liaison point with Treasury to prepare and discuss quarterly funding requirements
- Continually monitoring cash levels to ensure optimum treasury management and returns
- Monitoring the assets of the company – including the fixed assets as well as those assets held as inventory
- Responsible for ensuring the timely and accurate repayment of loans to Treasury
- Key liaison point for the external auditors and valuer

My key achievements included:

- Substantial rebuild of the Business Plan model resulting in significant time savings to prepare
- Decrease in the delivery of month end reporting by four working days
- Introduction of KPI reporting on all key matters to the Board Reports
- Creation of new policies in relation to cash management, capitalisation, and treasury
- Acknowledgement by the Senior Leadership Team upon completion of a complex reconciliation of all Treasury funding requirements for all projects and activities to be undertaken from 1 January 2019 to the end of the organisation's life

In my time at Otākaro, I also took on numerous additional responsibilities within the organisation including:

- Election onto the Health and Safety Committee as a representative
- Joint responsibility for the delivery of the Audit and Risk Manager role
- Active involvement in the Social Club as Treasurer

**BDO Christchurch – Manager (Audit and Assurance Services)**

**April 2012 to July 2018**

BDO Christchurch is a full-service accounting firm with 11 partners and over 120 staff. It is the fifth largest accounting network internationally.

As a key member of the Senior Leadership Team, I was responsible for an extensive portfolio of clients within a team of 23 (including 2 partners, 1 associate, 3 managers and 17 staff). On a daily basis, I managed the workload of all 17 staff, was the key liaison point for clients, on-site teams as well as the two Audit Partners and ensured that audits were conducted and delivered to the highest technical standard. Within this role I was:

- Responsible for the largest portfolio within the audit team, both in number of clients (c140) and fee base (c\$900k)
- Involved in a range of complex assignments, including Health Service Providers, Large Charitable Entities, Religious Institutions, Manufacturers, Software Companies, Vineyards, Forestry Companies and FMC Entities with revenue streams of between \$2M and \$70M
- Responsible for the audit of the Real Estate portfolio (including their trust accounts)
- Completion of non-audit work, including compilation of financial statements, research and development reviews, anti-money laundering reviews and internal control reviews
- Use of communication skills to ensure that assignments are completed on time with all relevant stakeholders being kept informed, including audit partners, client management and others where appropriate
- Assisted a \$40M turnover charitable health organisation to transition from NZ IFRS to Tier 1 PBE Standards

**PKF UK LLP (Liverpool, UK) – Audit Supervisor**

**January 2008 to March 2012**

Responsible for the supervision of audit teams in the not-for-profit sector. Managing teams of up to four people to ensure a high quality and timely external audit. Within this role I was:

- Audit supervisor for all large not-for-profit assignments, including Social Housing Providers, Religious Institutions and Health Service Providers
- Responsible for the review of junior audit teams' work
- Key liaison between clients, and the audit senior management team

Duncan Sheard Glass (Liverpool, UK) – Audit Senior

**September 2004 to December 2007**

Responsible for the completion of audits and other assignments for a range of entities. Within this role I was:

- Audit senior for a variety of clients from manufacturers to not for profit entities
- Responsible for the preparation of financial statements, VAT returns and tax calculations for most of my client base

**Hobbies, Interests and Ongoing Learning**

- Keen Rugby League fan, following Wigan Warriors and New Zealand Warriors avidly
- Learning Te Reo Māori (currently in my seventh year and on my journey to fluency)
- Spending time with my husband and our two dogs

**References**

Available upon request