

ROLE SUMMARY

Under the overall direction of the Director of Finance and reporting to the Senior Manager of Financial Services, the Manager of Financial Planning plans, organizes, directs, and evaluates the operation of financial planning functions in the Department including the recruitment and training of employees. Manages the preparation, analysis and monitoring of the operating and capital budgets for the organization. Manages budget reporting to internal users and government entities. Provides various financial analysis and reports. Provides budget advice to all employees and departments and is a subject matter expert for the enterprise budget system. Develops, updates, and implements budget policies, and coordinates the development of budget related training for all employees. Identifies and implements improvements and enhancements to the enterprise budget system. Performs other related duties as required.

QUALIFICATIONS

- Professional accounting designation.
- Seven years' experience including a minimum of five years managing employees including recruitment.
- Experience in accounting, budgeting and financial analysis.
- Public sector accounting and budget experience, preferably in local government.
- Deep understanding and knowledge of budget theory, principles and practices.
- Ability to develop and provide budgeting training and orientation.
- Considerable knowledge of computerized financial systems, particularly enterprise budget systems.
- Ability to analyse and evaluate budgeting problems, develop and recommend solutions.
- Ability to work effectively with minimum direction and supervision.
- An equivalent combination of education and experience may be considered.

Major Accountabilities**Advice & Support**

- Identifies, champions and implements optimization of budget processes through the enterprise budget system.
- Periodically reviews the requirements for all manual and automated systems to ensure that the current and future needs of the departments as well as organization are met.
- Provides information, clarification, and advice to all budget stakeholders for budget policies and procedures. Supports these same stakeholders with revising, updating and monitoring operating and capital budgets.

Leadership of Staff

- Manages employees within the Financial Planning section.
- Leads by example in terms of establishing annual personal performance objectives to be achieved by professional staff. Meets regularly with own direct reports to establish each of their annual personal performance objectives and holds them accountable for results.
- Leads or oversees recruitment, orientation and training of new staff in accordance with District policies.
- Provides departmental leadership, including coaching, mentoring, training and development and performance management.

Division Operations

- Prepares draft of annual operating and capital budgets in accordance with *Community Charter* and Council approved budget guidelines for review by Senior Manager and Director.
- Analyses, monitors and reports on the operating and capital budgets.
- Develops and manages budget training for financial planning section and other employees across the organization.
- Reviews routine variance analysis and investigates or queries any irregularities or non-compliance with District's Financial Plan.
- Leads and/or participates in projects and facilitates and/or participates in policy and process review and development.
- Responsible for maintaining the integrity of the enterprise budget system.
- Prepares various reports for the District which include reporting for the Finance and Governance Committee as well as Council; Prepares annual Financial Plan book.
- Maintains a variety of financial budget records, undertakes system reviews and studies.
- Carries out additional duties and exercise additional responsibilities as may be required from time to time.