



JOB DESCRIPTION

TITLE: **MANAGER, FINANCIAL PLANNING**

DEPARTMENT: **Finance**

Position Last Evaluated: **n/a**

Job Desc. Last Updated: **Dec 2023**

GENERAL ACCOUNTABILITY

Reporting to the Director, Finance, this position is responsible for planning, developing and administering the financial planning systems for the City of Nanaimo. The Manager will work with all departments on the City's five-year and long-term financial plans and strategies while maintaining financial sustainability and affordability.

The incumbent exercises considerable independent judgement and action in their daily work and only matters of major impact or policy are referred to the Director.

NATURE AND SCOPE OF WORK

Organizes, directs, and controls the activities of personnel engaged in the City's business and financial planning, and grant applications and administration.

Responsible for the selection and appointment of staff, employee evaluations, recommending promotions, disciplinary action, and training requests. Confers with department staff and their representatives to resolve complaints and grievances. Reviews effectiveness of assignments provides advice and guidance and assists staff with difficult administrative and technical problems.

Coordinates and provides direction for the development, preparation, analysis, and ongoing review of departments five year and long-term financial planning process, including operating and project budgets, asset management plans, monthly reporting, and quarterly forecasting.

Monitors spending to ensure the effective and efficient expenditure of funds within the approved budget.

NATURE AND SCOPE OF WORK cont.

Provides financial information to Council, staff, media and the general public.

Develops, implements and administers internal control measures.

Advises and collaborates with departments in preparation of business cases to support new services, enhanced services, changes in service delivery models, and projects.

Advises, coordinates, and collaborates with departments in development of business and asset planning for the five-year financial plan and for long term planning including value for money analysis and impact on annual operating budgets.

Identifies funding strategies and sources for business and asset planning for both five year and long-term planning horizons.

Provides financial and management leadership and expertise to departments for change management initiatives.

Monitors and analyses performance metrics and uses performance, financial data, and benchmarks to identify the cost efficiency of services and assist in opportunities to improve value for money.

Attends meetings of Council, Committees of Council and associated bodies at the request of the Director, Finance and provides advice and guidance as required.

Provides advice and guidance to all City departments on financial matters. Presents financial information to senior staff.

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

Thorough knowledge of financial and accounting principles, practices, and procedures specifically related to local government.

Thorough knowledge of the statutes, regulations, and bylaws that relate to the duties of this position, including but not limited to the Community Charter, Excise Tax Act, Financial Information Act, Public Sector Accounting Board regulations.

Thorough knowledge of personal and ERP (Enterprise Resource Planning) computer applications.

Extensive knowledge of solving complex business problems through data analysis, scenario modeling, and creative thinking.

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES cont.

Ability to interpret legislation, regulations, and municipal bylaws and to prepare new bylaws and amendments for Council consideration.

Ability to make sound judgment in a wide variety of complex situations with no established precedents.

Strong ability to 'connect dots' and make strategic recommendations within the broad corporate context taking into consideration interdependencies among policies and initiatives.

Strong leadership, ability to identify, attract, and develop talent, and empower and motivate others.

Thorough knowledge of personnel administration objectives, practices, and procedures and of union contracts and regulations as they relate to the work performed.

Ability to plan, organize, manage, direct, and monitor programs, services, and personnel.

Ability to interpret, report, and provide advice and guidance on a variety of regulatory, legislative, and administrative matters.

Ability to establish and maintain effective working relationships with a wide variety of internal and external contacts.

Extensive knowledge of building or reviewing financial and operational models, designing reports and dashboards for effective decision making, and initiating business process improvements.

Excellent communication and presentation skills with the ability to deliver complex concepts to both technical and non-technical audiences.

MINIMUM TRAINING AND EXPERIENCE REQUIRED

Completion of a recognized British Columbia Professional Accounting Designation (CPA) and 5 years' related experience in a variety of accounting practices, including preparation of complex financial analysis, including proven management supervisory experience in municipal government.

An equivalent combination of education and experience may be considered.

REQUIRED LICENCES, CERTIFICATES, AND REGISTRATIONS

Possession of a valid Class 5 BC Driver's Licence.

Satisfactory Criminal Record Check.

GENERAL STANDARDS

Managers and supervisors shall ensure the health and safety of their employees by demonstrating support and participation in all aspects of the Occupational Health and Safety (OHS) Program, communicating hazards and expectations of safety, maintaining safe work areas, and assigning work to trained persons.

All employees shall take reasonable care to protect their health and safety, and the health and safety of other persons by becoming familiar with the Occupational Health and Safety (OHS) Program, following established safe work procedures, using protective equipment, and asking for training if unfamiliar with work requested to perform.

Contributes to maintaining a respectful, safe and supportive work environment that embraces diversity and where everyone is treated with courtesy, dignity and fairness.

Adheres to City policies and objectives.