



Making a difference...together

# Leadership Opportunity

## Manager, Financial Planning & Performance

### *Finance & Technology– Financial Services*

Competition	<b>19/107</b>
Status	<b>Exempt Management</b>
Salary Range	<b>\$104,380-\$122,800 annually (2018 rates)</b>
Review of applications begins	<b>4:00pm on May 29, 2019, but the position will remain open until filled.</b>

### **Position Purpose**

The Manager, Financial Planning and Performance is responsible for providing leadership and strategic direction specific to the CRD's operating and capital planning and analytical processes with a focus on financial sustainability, performance, and business intelligence. As a change agent, the manager will drive change towards a more collaborative and consultative business partnership with divisional clients. The role also leads the annual budgeting processes and associated annual and interim variance reporting. The incumbent ensures effective forecasts are produced throughout the year to support operational decision making processes that enable the achievement of Board and Corporate priorities and goals. The position is responsible for collaboratively working with departments, developing and maintaining measurement, performance and business intelligence practices. The position also works collaboratively with other division managers as well as CRD departments to provide best-in-class customer service with a commitment to simplification, transparency and innovation. This position provides oversight to ensure compliance in financial planning with the Local Government Act and Community Charter.

### **Key Accountabilities / Position Outcomes**

- Manages and provides leadership to support CRD's operating and capital planning processes.
- Manages and compiles financial plans to facilitate the preparation of requisition invoices to the municipalities and the surveyor of taxes.
- Develops, implements and monitors adherence to corporate policy and procedures related to budgeting, financial analysis, financial planning and financial reporting including liaising with internal clients and stakeholders to ensure departmental financial processes align with Finance and Technology policies and procedures as well as regulatory requirements.
- Develops and manages the accumulation and consolidation of all financial data necessary for annual and interim reporting requirements.
- Adapts and improves financial reporting (annual and interim variance), metrics, and modelling to measure and drive business performance.
- Designs, develops, and delivers monthly forecasts of key financial results and metrics to support senior management with financial review and analysis, modeling, forecasting, performance trend analysis, and tracking of key financial drivers to enable better decision making.
- Manages all cost sharing information and calculation of requisition funding, and the prior year requisition adjustment process.
- Prepares draft cost sharing formulas and business cases for potential or existing services.
- Together with the Senior Manager of Financial Services, initiates, coordinates and advises on the service planning process and the development of the service plan documents integrating performance metrics and financial plans.
- Provides support to corporate departments including providing advice and guidance on financial matters
- Manages charge out rate and allocation methodologies and the annual calculations.

- Contributes to the development of the annual investment plan including short and long term investment strategies.
- Prepares bylaws related to financial initiatives, such as to establish reserve funds, approve capital and operating financial plan.
- Responsible for the leadership and management of employees and contractors within area of responsibility, including employment and labour relations matters involving: employee hiring, promotion, demotion and other personnel matters; discipline and discharge; representing management in the grievance procedure; input on behalf of management into labour relations matters, and representing management on committees; maintaining Employer confidentiality; and developing, supporting and implementing various corporate and legislated policies, procedures and practices.
- Other related duties as may be required.

## Qualifications

- A degree in Finance, Commerce, Business Administration, Public Administration or related, plus a CPA designation and a minimum of 8 years of relevant financial planning experience including experience in a local government environment or an equivalent combination of education and experience. Experience in long term capital planning, asset management and development of long term capital plans.

## Role-specific Knowledge, Skills & Abilities

- Knowledge and experience with related legislation including the Local Government Act, Community Charter and Public Sector Accounting Board principles and includes an understand of the relationship with the Regional District and the Municipal Finance Authority of BC.
- Proven ability to develop and implement business performance measures and incorporate best practices that drive sound decisions and ensure fiscal accountability.
- Embraces change and develops implementation plans to effectively communicate, build commitment and overcome resistance.
- Exemplifies leadership excellence through the display of optimism, building trust and mobilizes others to understand the corporate vision.
- Leads the way by displaying innovative thinking and creativity, meeting challenges with resourcefulness and optimism and generates an environment of continual process improvement understanding our contextual environment.
- Must be a team oriented leader with high level of integrity and business ethics and has proven themselves as a hands-on and results driven individual.
- Works collaboratively to establish and maintain working relationships with staff and all levels of management and the Board/Committees/Commissions.
- Ability to motivate and maximize contributions of the team to meet changing business needs.
- Ability to tactfully, courteously and effectively work and communicate with the public, staff, and management.
- Demonstrated management experience in a client-focused environment, ideally a unionized environment.
- Knowledge and experience working with MS Office programs, Sharepoint and other relevant software.
- Experience in working with an ERP system, such as SAP.
- Exceptional leadership skills, demonstrated by a proven ability to: work effectively with staff and establish and maintain respectful and professional relationships with both internal and external stakeholders.
- A valid BC Driver's License is required.

## Applications

To apply for this exciting opportunity, please submit your resume and covering letter online at [www.crd.bc.ca](http://www.crd.bc.ca) under "[Careers](#)".

**The CRD wishes to thank you for your interest and advises that only those candidates under active consideration will be contacted.**



## Appendix- Leadership Profile

### **Leadership Profile:**

CRD Leaders are champions for creating an accountable, high performance, service oriented organization that makes a difference in our community. They pay attention to shifts and trends in an ever-changing and complex environment and think strategically to serve residents, businesses and local governments today while developing a sustainable organization for the future.

### **Leadership Summary (L3):**

Leaders at this level generally manage professional employees and/or supervisors and may manage lower level managers in a diverse work group or broader functional area. They develop and manage operational plans and budgets to achieve operational objectives for their area that are aligned with departmental objectives. Working fairly independently, with occasional supervision from a direct manager, they play a hands-on role in daily operations of the group, using in-depth functional expertise, motivation, and diplomacy to interpret client needs, identify business issues, and resolve complex operational problems.

### **CRD Leadership Competencies:**

*While CRD Leaders are accountable to all Leadership Competencies, the following have particular relevance to this position:*

#### **Builds Partnerships**

Pulls people together to accomplish goals that could not be reached individually, including:

- Uses formal and informal networks to identify opportunities for collaboration
- Invites participation from diverse groups with common interests
- Balances consensus building skills with negotiation and influencing skills to achieve outcomes
- Empowers team members to take joint ownership of outcomes

#### **Sees the Big Picture**

Understands and helps others see the complexity of the CRD environment, including:

- Identifies connections, relationships and possibilities between and within different parts of the CRD
- Considers the impact of actions on other areas and/or the whole organization
- Helps others to connect current actions with the vision and strategic goals of the CRD
- Reviews and adapts plans to take advantage of emerging opportunities and to address changes in other areas.

#### **Is Accountable for Results**

Aligns the people, resources and systems necessary to deliver business results, including:

- Takes personal accountability for actions and outcomes in own area of responsibility
- Delegates appropriately to achieve results
- Empowers others to be accountable by setting clear outcomes, checking-in regularly, and providing mentoring to ensure goals are met
- Celebrates individuals/teams successfully delivering outcomes

## **Focuses on Service**

Maintains a focus on service (internal and external) including:

- Solicits information and feedback from clients and uses it to continually improve service
- Ensures decisions and changes align with our core business and serve the client
- Models a personal commitment to making a difference for clients
- Empowers employees to be accountable by removing barriers to service
- Recognizes and rewards employees for finding ways to improve service

## **Models Integrity**

Inspires trust by maintaining high personal standards that align with the values and philosophy of the CRD, including:

- Follows through on commitments and communicates progress
- Invites input and displays a genuine interest in the ideas and concerns of others
- Cultivates an open, respectful and transparent work environment
- Demonstrates humility by admitting errors and learning from mistakes