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OPPORTUNITY PROFILE **MANAGER, FINANCIAL PLANNING AND ANALYSIS**



the right people

CITY OF VERNON | MANAGER, FINANCIAL PLANNING AND ANALYSIS

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THE CITY AND ORGANIZATION

VERNON

Vernon is a city where nature and community are seamlessly intertwined. From the serene lakes reflecting the grandeur of surrounding mountains to the vibrant streets filled with local culture, the city invites you to explore both its natural beauty and its warm, welcoming atmosphere. The natural world is not just the backdrop to Vernon, it is a central part of everyday life, offering a balance that defines the city's unique character. Founded in 1892, Vernon has evolved from a small agricultural hub into a thriving city of over 49,000 residents, while its metropolitan region, Greater Vernon, has a population of closer to 100,000. With this population, Vernon is the largest city in the North Okanagan Regional District.

The city's rich history is visible in its well-preserved buildings and long-standing traditions, while its modern vibrancy is reflected in its innovative spirit, local businesses, and cultural offerings. The downtown core, where these two elements meet, is a bustling area that draws both residents and visitors. It's home to an eclectic mix of local shops, restaurants, galleries, and cultural venues, making it a central gathering spot for the community. It isn't just the urban areas that define Vernon, it's the surrounding landscape that makes the city truly special. Surrounded by lakes, forests, and trails, Vernon provides year-round access to outdoor activities that are central to life here. Whether it's a summer day spent cycling to the lake, a winter afternoon skiing at SilverStar Mountain, or a peaceful walk through one of the city's many trails, the natural beauty of Vernon invites residents and visitors alike to embrace the outdoors.

Vernon's over 30 parks are a vital part of the city's outdoor lifestyle. Each park serves as a space for relaxation, recreation, and connection. From peaceful retreats for picnics and quiet reflection to lively hubs where families gather for festivals, artisan markets, and winter carnivals, Vernon's parks are places where the community comes together to celebrate life. These parks not only enhance the quality of life but also create spaces where the city's values of inclusivity and sustainability are reflected. Vernon's residents share a deep connection to their community, whether in the heart of downtown or along the quiet trails that wind through its parks. The City's commitment to creating spaces that foster connection has made Vernon not just a place to live, but a place to thrive.

To learn more, please visit the City of Vernon's [website](#).

THE OPPORTUNITY MANAGER, FINANCIAL PLANNING AND ANALYSIS

Reporting to the Director, Financial Services (Chief Financial Officer), this senior-level role is responsible for financial planning and year-end variance reporting. As a key member of the Financial Services team, you will leverage your expertise to shape departmental policies, plans, procedures, and business practices, as well as processes and systems. You will also provide leadership to a team of finance professionals, fostering a collaborative, high-performance environment while supporting both individual development and broader corporate objectives. You will manage and support strategic projects focused on developing innovative programs, enhancing process efficiency, and optimizing resource allocation. Additional responsibilities include providing advice, direction, and guidance to departmental managers and supervisors on finance-related matters and cross-divisional initiatives. This role also ensures that tangible capital asset records are up to date, oversees debt issuance and payments, and manages reserve funds. The position serves as a signing officer and is required to act in the role of Chief Financial Officer in their absence.



Duties Include:

- Responsible for creating the five-year financial plan annually as required by the Community Charter, including the preparation of the Five-Year Financial Plan bylaw;
- Oversees the preparation of the five-year salary budget forecasts for every department, incorporating inflation rates and assumptions;
- Provides strategic direction to City Directors and Managers in the preparation of their annual divisional/departmental budgets;
- Provides City Directors and Managers education workshops and one-on-one meetings related to financial planning responsibilities;



- Reviews periodic variance reports prepared by Accountants and presents them to senior management and Council;
- Maintains continuity schedules for all reserves and deferred revenues for financial planning and reporting purposes and throughout the year as budget amendments are approved by Council;
- Reviews and ensures entry of budget amendments in financial systems resulting from Council resolutions;
- Responsible for the creation, maintenance and integrity of the Chart of Accounts in the City's financial software systems;
- Responsible for long term financial planning, modeling, and projections taking into consideration asset management lifecycles;
- Responsible for the preparation of budgets related to Fiscal Services and Taxation;
- Responsible for RCMP contract budget, accounting and reporting activity;
- Prepares reports and recommendations for Council and attends Committee and Council meetings as required;
- Support the annual financial statement year end preparations, audit, as well as other legislative and emerging reporting requirements;
- Participate as a staff liaison as required on Council committees as required;
- Acts as a Signing Officer of the City for the purpose of binding or obligating the City in connection with its accounts and transactions with the bank or other financial institutions;
- Liaison with software suppliers as required and implements major system initiatives related to budgeting, general ledger, accounts payable, tangible capital assets and financial reporting;
- Reviews and recommends revisions to, or establishment of, new policies, procedures and bylaws that support the financial planning functions of the City;



- Liaison with insurance providers for claims against the City including annual review of insurance premiums for property insurance and liability insurance;
- Ensure all expenditures processed by staff are authorized by policy or Council through the Financial Plan bylaw or Council resolutions;
- Ensure the timely processing of invoices and payment requests in accordance with policies and legislation;
- Ensure the timely completion of year-end reconciliations for various general accounts related to tangible capital assets, reserves, accounts payable, and clearing accounts;
- Develops and maintains a strong team through the use of coaching, mentoring and support of individual and team professional development needs;
- Ensures that team activities are consistent with the direction as set by the Director, Financial Services;
- Responsible for recruitment, assessment, development and performance management of the Financial Planning staff and makes recommendations to the Director, Financial Services regarding final on-boarding and off-boarding;
- Ensures compliance with Work Safe BC legislation and City Occupational Health and Safety policies and procedures;
- Performs other duties as required;
- All persons employed by the City of Vernon will be required to assist the City in providing emergency services. Duties assigned during an emergency may differ from regular duties.



Ideal Education and Experience

- Recognized accounting designation – Chartered Professional Accountant (CPA);
- Several years of progressively responsible experience in a Finance department setting;
- Demonstrated supervisory experience in a unionized setting.

Required Knowledge, Skills and Abilities

- Demonstrated ability to establish and maintain effective working relationships with a wide variety of internal and external contacts;
- Adopts professional values consistent with the accounting profession including honesty, integrity, due care in work completion, objectivity, independence in mental attitude and professional skepticism;
- Committed to life-long learning and staying well-informed of current trends and emerging issues;
- Demonstrated ability to apply critical thinking to identifying problems and potential solutions;
- Excellent understanding of a cohesive problem-solving process and project management;
- Works effectively as a team leader demonstrating commitment to team success using modern tools and techniques and progressive practices;
- Demonstrated ability in researching and analyzing data resulting in information that assists management/ Council decision-making;
- Demonstrated ability to communicate effectively both verbally and written to staff, peers, and Council;
- Extensive knowledge in recording payroll transactions and calculating payroll overhead rates;
- Knowledge recording tangible capital asset transactions and calculating amortization expense;
- Knowledgeable and general understanding of property and liability insurance.



Preferred Education and Experience

- Experience with legislation related to financial planning and reporting that must be complied with by the City such as, but not limited to, the Community Charter and Local Government Act;
- Demonstrated experience in preparing consolidated financial statements using Public Sector Accounting Standards (PSAS);
- Preference given to candidates with BC local government experience;
- Knowledge of financial software systems used in a municipality for financial planning and reporting purposes, with an ability to find resolutions to system constraints or problems;
- Previous experience using Workday, Workiva and Euna (Questica) for preparation of financial reports, statements, and budget;
- Project management professional designation (PMP).



Competencies and Personal Characteristics

Leadership – Achieves desired organizational results by encouraging and supporting the contribution of others; a proactive and positive team player who acts with a sense of urgency and leads by example; sets and communicates clear goals.

Accountable – Holds self and others accountable for responsibilities; focuses on results and measuring attainment of outcomes in a business focus.

Strategic – Develops a plan in support of organizational strategic direction. Demonstrates an understanding of the link between one's job responsibilities and overall organizational goals.

Integrity and Honesty – Demonstrates a resolute commitment to and respect for the spirit behind the rules and core values of the organization, setting an example of professionalism and ethical propriety.

Influential and Collaborative – Has an open and consistent approach to working with others and possesses strong interpersonal skills, with the ability to build relationships and develop/maintain partnerships, obtaining stakeholder agreement.

Creativity and Innovation – Develops new insights into situations; questions conventional approaches; encourages new ideas; designs and implements new or cutting-edge programs/processes.

Effective Working Relationships – Treats colleagues, and stakeholders with respect; resolves conflicts in a timely manner, negotiates effectively, and provides effective feedback to colleagues/employees.

Communication – Clearly presents written and verbal information; writes with clarity and purpose; communicates effectively in both positive and negative circumstances; listens well.

People Development – Fosters learning and development of others through coaching, managing performance and mentoring; has a genuine desire to develop others and help them succeed; formally and informally recognizes deserving staff and colleagues.

Partner Group Focused – Anticipates and attends to the needs of internal and external Partner Groups of the organization; keeps stakeholder interests in the forefront.



COMPENSATION

A competitive compensation package will be provided including an attractive salary range of \$128,545.57-\$151,230.08 and excellent benefits. Further details will be discussed in a personal interview.

FOR INFORMATION PLEASE CONTACT:

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