

## JOB DESCRIPTION

<b>Job Title:</b> BUDGET ANALYST	<b>Department:</b> FINANCIAL SERVICES	<b>Division:</b> FINANCIAL PLANNING, PAYROLL & BUSINESS PERFORMANCE SERVICES
<b>Classification:</b> EXEMPT	<b>Supervisor's Title:</b> MANAGER OF FINANCIAL PLANNING, PAYROLL & BUSINESS PERFORMANCE	<b>Date:</b> APRIL 25, 2024

### SCOPE OF THE ORGANIZATION

The Corporation of the City of Courtenay was established in 1915 to deliver municipal government services to the community. The City Manager (CAO) is responsible to Council for managing all City Operations. The following departments report to the CAO: Corporate Services, Development Services, Infrastructure and Environmental Engineering Services, Financial Services, Operational Services, Recreation, Culture & Community Services and the Fire Department.

The Financial Services Department includes the Finance, Purchasing, Financial Planning, Payroll and Business Performance Services divisions and is responsible for managing the financial and purchasing systems, supporting the activities of other departments, and providing financial information to the public.

### POSITION SUMMARY

This position provides support in the preparation of the annual operating and capital budgets and short and long-range financial plans.

The position also involves supporting the Strategic Financial Analyst in the development, implementation and management of continuous improvement opportunities, procedures, and processes designed to increase transparency, reliability, efficiency, productivity and accuracy and works closely with senior leadership and all departments in the execution of business performance strategies.

### REPORTING RELATIONSHIPS

This position reports to the Manager of Financial Planning, Payroll and Business Performance.

## **MAJOR RESPONSIBILITIES**

1. Provides support for the preparation of the annual budget and short and long-range financial plans and the review of the budget submissions to ensure consistency and compliance with established policy and procedures, and provides assistance with budget development to departments as necessary.
2. Assists the Strategic Financial Analyst with the implementation of various process improvement initiatives. Provides training and support to City staff with FMW software.
3. Provides data analysis and financial decision support such as financial modelling, business need analysis, benchmarking and business case development, supporting sound organizational fact-based decision-making.
4. Provides support with the preparation and communication of analyses, presentations, and business reports to the City Manager (CAO) and senior leadership team while ensuring accuracy and integrity of data.
5. Assists with the development and delivery of training that promotes education and accountability of leaders and staff with respect to City policies, processes, procedures, and deliverables.
6. In the absence of the Manager of Financial Planning, Payroll and Business Performance provides backup in reviewing bi-weekly payroll batches and weekly accounts payable batches.
7. Assists the Strategic Financial Analyst with managing projects and coordinates work with project teams.
8. Independently resolves complex, multi-faceted problems to meet the business needs.
9. Reports regularly to the management team on trends, analysis, forecasts and variances in the annual financial plan.
10. Assists in the investment and borrowing of funds and performs cashflow projections and analysis.
11. Assists other members of the Finance team who are responsible for preparing the year-end financial statements with data and information requests, and other statutory reporting as required.
12. Provides input on modifications or improvements to policies, procedures and practices to improve the functioning of the City's Financial Department; drafts and maintains written work procedures for own area of responsibility.
13. Carries out safe work practices and adheres to safety and other work-related regulations, observes and reports unsafe and/or insecure situations as may arise from time to time, and implements emergency procedures as directed.
14. Carries out other related duties as assigned or required.

## **TYPICAL QUALIFICATIONS**

### **Education Requirements:**

- Undergraduate degree in Business Commerce or other related discipline
- Professional accounting designation (CPA)

**Occupational Certificates, Licenses, Association Memberships:**

- Member in good standing with CPA professional accounting association
- Criminal Record Check

**Experience:**

- A minimum of three years of experience in strategic financial planning, reporting, budgeting and analysis functions
- A minimum of three years of experience providing related support to management teams including creation of materials such as business cases, formal presentations and briefing notes

**Knowledge, Skills and Abilities:**

- Demonstrated ability to conduct activity, workflow and organizational analysis for process re-engineering or efficiency improvements
- Ability to work at an advanced level in MS programs
- Demonstrated exposure and understanding of internal control systems in a multidivisional organization
- Ability to work with ambiguity and thrive in a changing environment while experiencing resource constraints
- Strong communication skills with ability to articulate complex financial matters to a non-financial audience
- Excellent analytical, problem-solving and decision making skills with the ability to identify trends, establish benchmarks and provide credible analysis and business recommendations with particular emphasis on periodic variance analysis and reporting
- Strong planning and organizational skills with the ability to create integrated plans, influence outcomes and engage multiple stakeholders
- Demonstrated ability to build partnerships, work collaboratively and communicate effectively
- Recognized as ethical, independent and service focused, demonstrating high standards of professionalism and respect for confidentiality

**COMPLEMENTARY ASSETS:**

- Local Government experience
- Experience with FMW or other budget software programs

This job description is an accurate statement of the position's reporting relationship, responsibilities, and qualifications as of \_\_\_\_\_, 20\_\_\_\_.

Director's Name	Signature	Date
_____	_____	_____
Manager's Name	Signature	Date
_____	_____	_____