

JOB DESCRIPTION
September 2024

Title & Reporting Relationships

Position Title:	Manager Financial Planning and Performance, Kaiwhakahaere Kaute, Finance Team, Corporate Services Group
Grade:	SP 19
Reports to:	Chief Financial Officer
Direct Reports:	Up to 6 FTE
Delegated Authority:	<p>Financial: This position holds a financial delegation of \$2,000. The position holder is authorised to enter into any contracts in relation to the duties of the position up to this specified limit in accordance with the Council's procurement policy.</p> <p>Human Resources: This position holds a delegation at Level D.</p> <p>A copy of the HR Delegations is attached.</p>
Purpose of the Group:	<p>The Corporate Services Group, comprises: Digital Solutions; Finance; Governance and Legal Services; and Risk and Assurance.</p> <p>The Corporate Services Group is responsible for providing the strategic management and robust effective operation of all financial management, information and technology management, governance and legal services as well as ensuring organisation wide risks are assessed and monitored.</p>
Purpose of the Position:	<p>Within the Corporate Services Group, the Finance Team is primarily responsible for delivering effective corporate planning, performance monitoring and reporting, financial management and processing, rates levying and management, and audit and financial risk management.</p> <p>The Finance Team provides high quality, timely, effective advice and support across the organisation – including to Elected Members, Committee's and Community Boards - to ensure we are able and informed to deliver on Community Outcomes.</p> <p>The Manager, Financial Planning and Performance, will work with the Chief Financial Officer to support the Group Manager Corporate Services in the provision of financial leadership to the Council. This is a senior financial management role responsible for:</p>

- Monthly Performance Reporting and Financial Analysis.
- Preparation and delivery of Reports to the Council, Community Boards and Committees.
- Leading, delivering and ensuring consistent, timely and active participation in the Community Plan process and the financial review of the Long Term Plan and the Annual Plan.
- Strategic direction and forward planning, including the financial component of planning documents necessary to meet legislative requirements.
- Business management & continuous improvement.
- Evaluating business cases, projects and investments.
- Team performance and development.
- Co-ordinate development and update of financial aspects of Asset Management Plans and the associated capital expenditure prioritisation decision processes.
- Develop and implement prioritisation tools for Opex and Capex projects.
- Testing the robustness of the financial internal controls and processes.
- Provide support and business advice to Group Managers.
- Ensure financial budgeting and reporting system are working effectively and efficient to be able to deliver good financial reports

As a senior leadership role within the Finance Team, the role is expected to provide a proactive and positive contribution to the Group by leading 'best practice' for the organisation and enabling development coaching to other Group members.

Internal Contacts:

Chief Executive
 Group Manager Corporate Services
 All Group Managers
 Chief Financial Officer
 Manager – Financial Accounting
 Manager – Rates
 Principal Adviser - Corporate Services
 Finance Group staff
 Organisational Development Manager
 Manager – Payroll and Reporting
 Asset Managers
 Budget Managers
 Community Boards and Committees

External Contacts:

SOLGM
 NZICA
 Other Local Authorities
 Other professional advisors

KEY RESPONSIBILITIES AND OUTCOMES

In the current local government environment, Council must be well positioned and supported to meet the current and future needs of our communities for good quality local infrastructure, local public services, and performance of regulatory functions in a way that is cost-effective for businesses and residents. The Council needs to be ready for, and respond appropriately to, changes in external operating environments (such as shifts in government policy), which in turn influences how we do things. The Council is working to be well-positioned not only to see what is coming but also to take opportunities to influence the shape of these externally driven changes.

We require all staff to demonstrate behaviours that underscore our commitment to build and maintain an organisation that is acknowledged and respected for being:

- Caring – we understand our customers' needs, share information and work as a team;
- Dynamic – we bring a can-do attitude to make it happen; and
- Effective – we get it right and deliver consistent, value for money services.

Staff will be aware of political sensitivities, support equal employment opportunities, and demonstrate an understanding of Te Tiriti o Waitangi within the context of a local authority.

Functional Key Requirements

Management Reporting and Analysis

- Ensuring the continued development and improvement of the financial planning processes and systems to meet management, organisational and legislative needs.
- Managing the reporting of non-financial performance metrics, integrating these with financial reporting where appropriate
- Managing the budget preparation process for the Long-Term Plan and Annual Plan.
- Leading the preparation and completion of the financial sections, and non-financial performance metrics in Council's Annual Plan, Annual Report and Long-Term Plan. Providing monthly financial reports to the Senior Leadership Team, individual Group Managers and their respective budget managers including assisting managers with planning and budgeting, highlighting and interpreting performance, updating financial forecasts, highlighting risks and variances.
- Monitoring the performance of Council activities and report on exceptions on a monthly basis.
- Monitoring performance of entities of Council that manage Council assets or are provided with significant grants.
- Working with the Group Manager Corporate Services, Chief Financial Officer and other senior finance managers to provide financial leadership to the Council.
- Ad hoc review of project performance as required by the manager.

Business Management & Continuous Improvement, Risk Management

- Regular testing of internal financial controls, processes & systems to provide assurance of a low-risk environment.
- Oversee procedures and systems that ensure staff are continually looking at improvement opportunities and that agreed objectives and targets are achieved.
- Ensure that all Council expenditure is approved, correct for payment, correctly coded and authorised within financial delegations.
- Highlight financial and other risks and opportunities.
- Regularly review financial risks with CFO and other managers within Finance

Strategic Direction and Forward Planning

- Provide specialist financial expertise as an input to the development, communication and implementation of the Long-Term Plan and other relevant planning documents.
- Assist with business plans and financial analysis of projects and ensuring alignment with wider Council plans.

- Provide recommendations for appropriate goals, objectives and strategies for all areas of activity.

Personal Key Results

- Demonstrate commitment to organisational values through behaviour that is consistent with our caring, dynamic and effective approach to customer service.
- Establish and maintain effective and efficient working relationships with all stakeholders.
- Contribute collaboratively, positively, and effectively to the operation of the team, the Group, and the organisation as a whole.
- Take responsibility for your own self-development to enhance skills and knowledge applicable to current and future positions.
- Exhibit behavior which is consistent with the understanding of Te Tiriti o Waitangi and its application for the Council.

Health and Safety

Our managers are expected to be champions for health & safety excellence. All employees have a responsibility to work towards keeping a safe and healthy work environment by following safe work methods, identifying workplace hazards and risks, using appropriate safety equipment, and complying with all policies and procedures that are in place. Employees must take reasonable care of their own health and safety and ensure their actions or inactions do not cause harm to themselves or others.

Expectations of manager responsibilities for health and safety include but are not exclusive to;

- Visibly demonstrating to their team and stakeholders that good health and safety practices are an integral part of the Council culture
- Integrating health and safety requirements and expectations into daily business making decisions
- Proactively monitoring the resources required achieve agreed health and safety performance targets
- Reviewing health and safety performance with an inquiring mind, looking to understand and gain insight and assurance that risk is being effectively managed and balanced along with other Council priorities
- Hold self to account through setting clear expectations and performance goals that enable each person to contribute towards making Council a safe and healthy place to work.

At the discretion of the Council, as part of a rehabilitation program, you may be required to return to work to undertake such alternative duties as are available and are as reasonably within your capability and level of fitness as determined in consultation with a registered medical practitioner.

Essential Skills, Knowledge and Experience

- Minimum qualification of Chartered Accountant with CAANZ membership coupled with at least 5 years consistent working experience in a senior financial management position in multidisciplinary environment.
- Demonstrated experience in financial analysis and modelling.
- Demonstrated proficiency with systems experience in one or more accounting software systems, particularly planning and budgeting systems and contemporary reporting tools.
- Competent user of MS Office programmes in particular MS Word and MS Excel to advanced level.
- Demonstrated analytical and conceptual problem solving of complex issues providing innovative and creative solution based outcomes.
- Demonstrated experience leading teams to deliver outcomes and work effectively to deadlines.

- Effective interpersonal skills with a demonstrated commitment to customer service and willingness to working with stakeholders.
- Effective time management skills and ability to work effectively without supervision and collaboratively as an effective team member.
- Ability and willingness to coach and lead team members.
- Good communications skills both oral and written, including ability to write concise and clear reports and explain and present to a range of audiences.
- Demonstrated effective organisational skills with ability to prioritise work effectively under pressure to meet deadlines.
- Hold a current & valid NZ Drivers Licence.

Other Information

From time to time, the position holder may be required to perform other duties in conjunction with the role and which are reasonably within their experience and capabilities.

Civil Defence, Emergency Management and Business Continuity Duties

All staff of Kāpiti Coast District Council may be required to undertake Civil Defence and/or Emergency Management duties in the event of an emergency. (Training will be given as appropriate.)

Staff will also be required to assist with maintaining business continuity in the event of a disruption to Council business and/or the impact of a pandemic by undertaking duties in accordance with how the Council responds to the interruption.

The Council likewise recognises the staff member's need to ensure their family's needs are adequately catered for.

Performance Review

Performance in this position will be assessed in terms of an agreed performance plan.

JD APPENDIX - GENERIC ORGANISATIONAL COMPETENCIES

Leadership	<ul style="list-style-type: none"> • All employees of the Council are expected to be leaders in supporting the Council's vision, role modelling the delivery of consistent high customer service levels to internal and external customers and championing Council values. • Leaders are expected to actively contribute to achieving the Council's aspirations with respect to the relationships with Te Āti Awa ki Whakarongotai, Ngāti Toa Rangatira and Ngā Hapū o Ōtaki; and be willing and able to provide thought leadership and quality advice to enable our elected members to make good decisions. • People Leaders are expected to: effectively build and maintain an engaged, healthy, thriving and high performing team; ensure their people are current in their knowledge of legislation and training is available to keep pace with best practice. • Ensure people policy and practices are consistently observed and implemented and opportunities exist for ongoing professional growth and development; ensure their people are consistently working collaboratively with other Council teams in the delivery of operational and strategic outputs; effectively manage day to day work output and timeframes; schedule and conduct regular team meetings to enable opportunities for team members to be informed and up to date in their areas and those areas that cross over with other teams. • Ensure individual team member performance is monitored, reviewed with appropriate and timely feedback, and written performance reviews are formally completed in a timely manner; ensure adequate provision of backup/cover for team members; establish an effective performance culture within their team, including ongoing performance appraisals with clear performance indicators and consistent standards. • Team Leaders/Supervisors/Managers are accountable for the leadership, support and coaching of their team members, the fostering of a teamwork approach to the delivery of both the team and the Group's outputs, and the identification of training and development as appropriate; enable, create and encourage linkages across the Council and the region for the benefit of all, the delivery of work programmes and the achievement of strategic priorities; embed strong leadership within their team and across the wider Council leadership group that drives increased diversity, engagement, capability and performance.
Legislative Compliance	<ul style="list-style-type: none"> • Keep up to date with legislation/amended legislative frameworks and be able to demonstrate the application of such changes (in work and or communicate them to others).
Project Management	<ul style="list-style-type: none"> • Effectively manage assigned projects to ensure on time and within budget, monitor and report regularly to manage risk and provide updates to key stakeholders.

	<ul style="list-style-type: none"> • Ensure documentation is current, available as required and is prepared using Council standard templates/documentation. • Ensure Council processes and procedures are complied with.
Customer Service	<ul style="list-style-type: none"> • Maintain a professional, courteous, and helpful attitude to all customers (internal and external) ensuring communication is accurate, succinct and in a manner which promotes customer service excellence and demonstrates organizational values. • Always maintain confidentiality.
Teamwork	<ul style="list-style-type: none"> • Participate willingly and positively in the orientation, training and support of new staff in specific areas, providing coaching/buddy support as required. • Provide a contribution to or participate in any projects and initiatives within the Group/organisation where required and the opportunity arises. • Participate in initiatives and contribute suggestions as to improvements and/or efficiencies to enable ongoing quality improvement. • Demonstrate a collaborative working style and participate as a member of the team undertaking all tasks maintaining positive working relationships with other staff members and internal and external customers.
Financial Management	<ul style="list-style-type: none"> • Ensure all financial activity is conducted in accord with current policy and procedures. • Ensure you work within your financial delegation.
Monitoring and Reporting	<ul style="list-style-type: none"> • Ensure any written reports are produced using Council standard templates and are provided within the required Peer Review timeframes. • Review, monitor and report on activity or projects as required by the manager.
Relationship Management	<ul style="list-style-type: none"> • Build and maintain effective professional working relationship with all key stakeholders. • Build and maintain effective working relationships with other council staff members based on a collaborative, collegial and cooperative working style.
Information Management	<ul style="list-style-type: none"> • Take responsibility for ensuring Council information is stored with the appropriate accessibility in the designated systems, using processes and tools as described in the current Information Management Policy.