

# Township of Southgate

## JOB DESCRIPTION

Date of Update: <b>November 12, 2024</b>	<b>Director of Corporate Services/Chief Financial Officer</b>
---	---

### Section A: Position Description

#### 1) Position Identification

The purpose of this section is to determine your current position within the organization.	
Job Title: Director of Corporate Services/CFO	Supervisor’s Job Title: CAO
Standard hours of work per week: 35 hours per week	Eligibility to Group Insurance: Yes Eligibility to OMERS: Yes
Location of Position: Hopeville Administration Office	Department / Division: Finance/clerks
Employment Status: Permanent Full Time Salaried	Pay Band: 2

#### 2) Scope of Position

Reporting directly to the CAO, the Director, Corporate Services (CFO) will have a key role on the senior leadership team and will work closely with Council. Providing mentorship and guidance with a wide-ranging portfolio including the overall responsibility for the development and implementation of strategic plans relating to the areas of Legislative Services, Information Technology, and Finance, including procurement.

Responsibilities will include, but are not limited to, overseeing the infrastructure of technical operations, leading the team of clerks, IT and Finance professionals, tracking technology and implementing process improvements in order to achieve business goals, eliminating security risks and duplication of effort, increasing internal and external stakeholder user satisfaction and maintaining operations and systems.

This position will also oversee, with a process efficiency lens, the development, refinement, and execution of a municipal strategic financial sustainability plan, which includes but is not limited to the annual budget process, grant funding, financial analysis, asset management, investments, payroll, billing and tax administration. The procurement oversight and function is also within the Directors purview and responsibility.

As a leader, the Director has a demonstrated record of effective leadership and guidance, customer focus, innovation and creativity, team advocacy, staff delegation, staff capacity building and achievement of results; and possesses a high level of personal integrity and consistently demonstrates positive, constructive communication skills.

<b>Key Responsibilities</b>	<b>Tasks</b>	<b>Percent of Time</b>
Strategic Leadership and Oversight	<ul style="list-style-type: none"> <li>- Develops, leads and implements the strategic leadership and efficient delivery of all the municipality's financial and technical services, including property tax, all revenue streams, procurement, IT services and infrastructure and process improvement</li> <li>- Oversees, administers and communicates the Township's operating and capital budgets</li> <li>- Acts as Treasurer under the Municipal Act and other applicable legislation, in absence of the Treasurer</li> <li>- Prioritizes goals and plans to ensure fulfilment and completion of the Township's organizational and strategic goals</li> <li>- Ensures quality assurance and performance measurement programs in place and all operations adhere to Provincial regulations, standards and principles.</li> <li>- Develops and negotiates solutions to Legislative, Finance and IT challenges along with responding to existing and emerging issues.</li> <li>- Leads innovative approaches and provides direction to achieve high quality Legislative, Financial and IT services in accordance with Council's Strategic Priorities.</li> <li>- Develops and implements both short and long-term objectives, the strategic mission and goals</li> </ul>	25%
Leadership and Staffing	<ul style="list-style-type: none"> <li>- Responsible for the planning, organizing, and directing of the municipality's Corporate Services Department.</li> <li>- Provides leadership, support, advice and motivation to staff within Finance, Clerks and in inter-departmental teams while developing, recommending, establishing, and executing policies, programs and services in regular consultation with Council, stakeholders and senior management.</li> <li>- Participates with Senior Management Team in the development of the Corporate Plans as they relate to Clerks, Finance and IT</li> <li>- Acts as a key liaison with various internal and external groups, including community members, developers, consultants, contractors, agencies (Federal, Provincial and Regional), on Finance and IT matters</li> </ul>	25%

	<ul style="list-style-type: none"> <li>- Participates as a member of the Emergency Management Program Committee.</li> <li>- Plans, recruits and identifies development needs for staff within the department</li> <li>- Provides coaching and mentoring and conducts performance appraisals and determines/recommends disciplinary actions.</li> <li>- Continually evaluates the team activities to ensure appropriate allocation of resources, ensure meeting objectives and deadlines are met and makes recommendations for improvement.</li> <li>- Implements and recommends operational changes, improvements and associated service levels supported by data that can be validated through public and staff feedback, and industry best practices</li> </ul>	
Council Relations	<ul style="list-style-type: none"> <li>- Reports and provides advice to the Chief Administrative Officer and Council on all Finance, IT, innovation and financial and business administration matters</li> <li>- Oversees and reports on the department's results to the rest of senior management and Council.</li> <li>- Provides strategic advice, legislative and legal advice to Council including setting the municipal vision, mission and goals</li> <li>- Negotiates on behalf of the Township</li> <li>- Advocates to other governmental agencies on behalf of the Township</li> <li>- Ensures timely and consistent communication to stakeholders on progress, impacts and changes</li> <li>- Prepares reports and attends Council and Committee of the Whole meetings and provides advice to Council on Finance and IT matters.</li> <li>- Guides responses and actions to public inquiries related to Township's Financial, Legislative, and IT services from various stakeholders.</li> <li>- Oversees and ensures the Township exceeds all obligations under relevant legislation and regulations</li> <li>- Monitors operations, projects and research within the service area to ensure safety, service quality, customer service, cost-effective and timely delivery of services</li> <li>- Ensures Council's objectives, financial transparency and accountability, monitors budget adherence, identifies and explains variances, and financial reporting is effectively managed in compliance with corporate financial policies</li> </ul>	25%

	<ul style="list-style-type: none"> <li>- Provides updates to Council both orally and in writing on provincial and federal budgets and / or other legislation, highlighting the impact on municipalities</li> <li>- Evaluates quarterly and year-end performance, coordinating information and data that enables operational departments to make informed decisions, through the use of objective and reliable data and advanced analytics</li> <li>- Ensures a corporation – wide adherence with the procurement policy</li> </ul>	
Policies/Programs/ Service Delivery	<ul style="list-style-type: none"> <li>- Oversees the management of the Corporate Asset Management Plan and ensures compliance with all relevant legislation</li> <li>- Manage the development and implementation of the Finance Department goals, objectives, policies, and priorities for each assigned service area. Establish, policy, appropriate service and staffing levels; monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; allocate resources accordingly for the Finance Services.</li> <li>- Challenges current practices and modifies organizational/departmental structure and systems in anticipation of the changing external environment.</li> <li>- Ensures operational processes, policies and protocols are established and compliance is monitored, assessing changes in legislative/regulatory requirements, identifying potential areas of vulnerability and risk, providing advice on emerging issues and developing strategies to ensure continued program and service delivery success.</li> <li>- Ensure compliance with Municipal, Provincial and Federal policies, procedures, and regulations pertaining to fiscal management and investment planning.</li> <li>- Oversee maintenance of the insurance portfolio, which ensures, that all Township’s assets have the required insurance coverage and that claims against the Town are handled promptly and correctly to minimize the Township’s exposure.</li> <li>- Ensure the design, implement and maintenance of the Municipality’s IT system meets corporate requirements and monitor the implementation of new developments.</li> </ul>	15%

Other	<ul style="list-style-type: none"> <li>- Leads cross departmental teams and initiatives for the municipality as needed</li> <li>- Ensures focus is service excellence, customer service communication /transparency, innovation and data integrity and workflow integration</li> <li>- Work safely in accordance with the Occupational Health &amp; Safety Act and related regulations.</li> <li>- Participate in corporate training</li> <li>- Other duties as required.</li> </ul>	10%
-------	--	-----

## Section B: Skills

### 1) Formal Education and External Training

<u>Highest level required</u>	<u>Specific Specialty or Degree? (List)</u>
<input type="checkbox"/> High School <input type="checkbox"/> Vocational School <input type="checkbox"/> Community College <input checked="" type="checkbox"/> University Degree	Accounting/Finance
<p>License or Professional Designation</p> <ul style="list-style-type: none"> <li>• Professional Accounting Designation required such as a CPA, CMA or CGA.</li> <li>• Completion of the AMCTO Municipal Finance &amp; Accounting (MAFP) and Ontario Municipal Tax &amp; Revenue Association Municipal Tax Administration Program (MTAP)</li> <li>• Completion of AMCTO Municipal Administration Program (MAP) and hold Accredited Municipal Clerk/Treasurer (AMCT) or Certified Municipal Officer (CMO) an asset</li> </ul>	
<p>Is it a requirement of your job to keep "up-to-date" by reading or taking courses / seminars?</p> <p style="padding-left: 40px;"><input checked="" type="checkbox"/> Yes      <input type="checkbox"/> No</p>	
<p>Discuss:</p> <p style="padding-left: 20px;">Must keep up to date on Federal and Provincial Legislative changes affecting Ontario municipal finance.</p>	

### 2) Required on the Job Training

<p><b>Specific Internal Training</b></p> <ul style="list-style-type: none"> <li>• Keystone finance software</li> <li>• Municipal Finance Officers Association (MFOA) Conference</li> <li>• Association of Municipal Clerks and Treasurers of Ontario (AMCTO) Conference</li> <li>• Association of Municipal Clerks and Treasurers of Ontario (AMCTO) Seminars</li> <li>• Seminars, Tax Capping Seminars/Workshops</li> <li>• Tangible Capital Asset / Asset Management</li> </ul>	<p><b>Months to Complete</b></p> <p>1 Month Annually As required</p> <p>As required/offered</p> <p>As required/offered As required/offered</p>
---	--

### 3) Work Experience

<p><b>Experience</b></p> <ul style="list-style-type: none"> <li>• Senior Municipal Finance and Administration</li> <li>• Supervisory or Management</li> <li>• Payroll / Human Resources</li> <li>• Municipal experience in accounting, administration, finance and taxation</li> </ul>	<p><b>Minimum Years Required</b></p> <p>5 years</p> <p>3 years</p> <p>Would be an asset</p> <p>5 years</p>
--	--

### 4) Other Key Skills:

<ul style="list-style-type: none"> <li>• A commitment to the vision and mission of the Township;</li> <li>• Comprehensive knowledge of the Municipal Act together with all related legislation and regulations;</li> <li>• Experience and knowledge concerning IT infrastructure, network administration and system security</li> <li>• Project Management and Process Improvement skills;</li> <li>• Proven leadership and mentoring abilities; team building and staff management skills following an individualistic approach;</li> <li>• Demonstrated ability to prepare and analyze comprehensive reports and legislation;</li> <li>• Extensive knowledge in dealing with accounting systems, budgets, internal controls, business planning and asset management;</li> <li>• Strong working knowledge of legislation, regulations, policies, and procedures that impact municipal financial operations, including, but not limited to, a working knowledge of Ontario FIR reporting and the Ontario <i>Municipal Act</i>.</li> <li>• Thorough knowledge of procurement practices, legislation and processes;</li> <li>• Excellent communication skills both written and oral;</li> <li>• Effective attention to detail and a high degree of accuracy;</li> <li>• Sound analytical thinking, planning, prioritization and execution skills;</li> <li>• High level of integrity, confidentiality and accountability;</li> <li>• High degree of resourcefulness, flexibility and adaptability;</li> <li>• Strong work ethic and positive team attitude;</li> <li>• Ability to build and maintain lasting relationships with internal and external stakeholders including Council, other departments, key business partners and government agencies;</li> <li>• Well-defined sense of diplomacy, including solid negotiation and conflict resolution.</li> </ul>
---

## 5) Key Relationships (Contacts)

<b>Internal Contacts</b>	<b>Frequency</b>	<b>Purpose</b>	<b>Method</b>
Co-workers (my dept.)	Continuously		
Co-workers (other dept.)	Frequently		
Supervisor (my dept.)	N/A		
Supervisor (other dept.)	Frequently		
Dept. Head (my dept.)	N/A		
Dept. Head (other dept.)	Frequently		
CAO	Frequently		
Council (your own)	Frequently		
<b>External Contacts</b>	<b>Frequency</b>	<b>Purpose</b>	<b>Method</b>
General Public (Not residents)	Frequently		
Ratepayers	Frequently		
Children/Students	Seldom		
Seniors	Occasionally		
Staff in other municipalities	Frequently		
Business representatives	Frequently		
Consultants, Engineers, Planners, etc.	Frequently		
Auditors	Occasionally		
Suppliers	Frequently		
Solicitors	Seldom		
Funding Organizations	Occasionally		
Government Officials	Occasionally		
Boards	Occasionally		
Council (other municipalities)	Seldom		
Media	Occasionally		
Ratepayers Groups	Occasionally		
Software Support Tech.	Occasionally		
<b>Interpersonal skills:</b> Extending common courtesy; handling complaints, working cooperatively; responding to basic needs or requests; resolving conflicts (major and minor); advising; persuading; mediating, communicating in difficult or complex situations.			

## 6) Decision Making

<p>Utilizes substantial discretion in exercising full authority over the planning and operational activities of the Finance department.</p> <p>Authority for financial decisions affecting the Township.</p> <p>Must use judgment and tact in dealing with complex problems relating to the day-to-day operations of the Finance and Taxation department.</p> <p>Must be empathetic, yet proactive when dealing with taxpayers in arrears of taxes.</p>
---

## 7) Problem Solving Responsibilities

Ability to analyze and evaluate operations, and develop and implement corrective action to resolve problems. Works within Public Sector Accounting Board (PSAB) accounting principles. Some problems are highly complex.

## 8) Equipment & Technology Utilized

Operating systems, Municipal Property Taxation software, Accounting Software, Payroll Software, Utility billing software, Asset Management software, Microsoft products, IT infrastructure.

# Section C: Responsibility

## 1) Program Delivery

Must have thorough knowledge of applicable federal and provincial statutes and regulations of financial reporting methods, and legislation related to tax billings and Tax Sales Act.

Ultimate responsibility for delivery of programs for the Finance Department.

## 2) Impact and Accountabilities

Responsible for the finances of the Municipality, as required under the Municipal Act.  
Must maintain confidentiality where taxpayer/ratepayers are concerned.  
Must maintain confidentiality regarding payroll services.

## 3) Supervision

<b>Direct Subordinates – Job Titles</b>	<b>Number of Staff</b>
Treasurer	1
Clerk	1
<b>Indirect Subordinates – Job Titles</b>	<b>Number of Staff</b>
Asset Manager / Deputy Treasurer	1
Property Tax and Assessment Coordinator	1
Finance Assistant – Payables & Payroll	1
Finance Assistant – Revenues & Utilities	1



Finance Assistant – Taxes & Receivables	1
Administrative Customer Service	1
Legislative and Records Coordinator	1
<b>Provides training/instruction to others – Job Titles</b>	<b>Number of Staff</b>
Assists CAO, Department Heads, and all other staff with municipal finance requirements and reporting.	

**4) Material and Information Resources**

<p>Network operating systems, computers and other standard office equipment.  Confidential Payroll information  Knowledge of the Municipal Act and other Provincial legislation.  Knowledge of provincial reporting requirements.</p>
---

**5) Financial Resources**

<p>Overall responsibility for the financial resources of the Municipality (including cash handling, balancing and accuracy of collections procedures)  Directly responsible for expenditures of money.  Responsible for accurate accounting data entry and reporting.</p>
---

**Section D: Working Conditions**

**1) Physical Environment**

Rate the amount of each of the following working conditions that you are exposed to on the job from a scale of 1 to 5, where 1 represents no exposure, 3 represents some exposure and 5 represents continuous/regular exposure.					
<b>Condition</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Sitting					X
Standing		X			
Noise Exposure		X			
Adverse Temperature	X				
Pushing/Pulling	X				
Lifting/Carrying		X			
Dust	X				
Odors	X				
Other (Specify) Physical Aspects					

**2) Health & Safety Hazards**

Minimal hazards, office environment

### **Health and Safety Responsibilities**

Responsible to perform duties in a Health and Safety conscious manner.  
Responsible for ensuring sub-ordinates work safely by following rules, training and discipline as required.

### **3) Travel**

Occasional travel required for attendance at meetings, seminars, or conferences.

### **4) Driving**

Occasional driving required for attendance at meetings, seminars, or conferences.

### **5) Mental Environment**

Busy office environment, open concept.  
Complex issues, interruptions, deadlines, dealing with subordinates and unhappy taxpayers/ratepayers, and financial responsibilities contribute to stress.

## **Section E: Effort**

### **1) Mental Effort**

Strong mental effort required. Good keyboarding skills and intense visual concentration is required.  
Deadlines and task management are major components of work effort.  
Constant interruptions – public, residents, co-workers, telephone.

### **2) Physical Effort**

Minimal physical effort required.  
Good keyboarding skills. There will be some long periods of data-processing required and occasional long periods of sitting.  
Intense visual concentration.

## Section F: Additional Information

The Director of Corporate Services (CFO) will continue to meet all requirements related to training and certification to maintain the Chartered Professional Accountant designation.

The Township of Southgate is an equal opportunity employer. Accommodations are available for all parts of the recruitment process. Applicants need to make their needs known in advance. This document can be made available in other accessible formats as soon as practicable and upon request.

### Supervisor Comments

I have reviewed this job description with the employee and make the following comments.

**Employee:** \_\_\_\_\_  
Signature

**Date Completed:** \_\_\_\_\_

**Supervisor:** \_\_\_\_\_  
Signature

**Date Completed:** \_\_\_\_\_

**CAO:** \_\_\_\_\_  
Signature

**Date Completed:** \_\_\_\_\_