



## JOB DESCRIPTION

**POSITION:** Finance Manager

**EFFECTIVE DATE:** August 13, 2020

**DEPARTMENT:** Finance

**REPORTS TO:** Chief Administrative Officer

**DIRECT REPORTS:** Senior Accountant

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### JOB SUMMARY

The Finance Manager is responsible for financial management and development to ensure the overall viability of the UNA. This position reports to the Chief Administrative Officer ("CAO") and assists in the development and implementation of goals, policies, priorities and procedures related to financial management, budgeting, accounting, human resources and payroll.

### OVERALL GOALS FOR THE POSITION

1. Manage organizational budget of \$5-6M per year.
2. Support the long-term financial sustainability of the UNA.
3. Optimize the business operations of the UNA.

### ROLES, RESPONSIBILITIES AND EXPECTATIONS

#### Strategic Planning

1. In coordination with the CAO and the management team, participate in the development of UNA goals, strategies, policies and procedures.
2. Support the CAO in executing the vision and strategic plan of the UNA.
3. Provide strategic advice and support to the Board and applicable committees/meetings (e.g. AGMs) on UNA finance related matters.
4. Make recommendations to the CAO, the Board and senior managers on the goals, priorities, projects, programs and services as they relate to the financial health of the UNA.
5. Provide strategic advice and guidance to the CAO on UNA administrative policies and procedures.
6. Provide leadership in accordance with UNA values & guiding principles.
7. Ensure professional management of UNA financial management function.
8. Participate in regular meetings with the management team, the Board and staff, and provide department updates as required.



### **Financial Reporting & Analysis**

1. Align the annual budget with the long-term financial goals of the UNA.
2. Review, prepare and present financial statements/reports, executive summaries, and financial feasibility studies.
3. Evaluate financial reporting systems, accounting procedures and make recommendations for changes to procedures, operating systems, budgets and other financial control functions to the CAO.
4. Prepare financial reports for the Annual General Meeting.

### **Planning**

1. Manage the financial planning and budget process to ensure effective UNA business operations via on-going assessment of organizational operations, processes, and programs.
2. Propose, plan and implement strategies that improve the financial viability of organization-wide operations utilizing information obtained from business operations assessments.
3. Manage special projects as directed by the CAO (i.e. conducting research, compiling data, preparing reports and presentations).

### **Financial Management**

1. Manage the financial planning and development of new programs and projects including communications and community engagement projects.
2. Develop the financial elements of project charters for UNA initiatives.
3. Perform variance analysis of budget vs. actual financial results and communicate relevant findings to appropriate staff and committees.
4. Develop and implement administrative processes and training programs for staff, relating to records management, finance, or other administrative services.
5. Coordinate and manage year-end financial audits.
6. Ensure compliance with accounting standards for non-profit organizations.
7. Ensure compliance and timely filing with tax authorities and other governing bodies.
8. Implement effective internal controls over revenues, payments, payroll, and cash handling.
9. Oversee the administration of payroll and employee human resources records, including ensuring timely payment to employees, benefits administration, correct reporting and timely payment of source deductions and WCB, accurate T4/T4A reporting, and ROE submission.
10. Maintain and improve financial record keeping in accordance with CRA requirements and LGMA standards.
11. Administer company bank account, including making deposits, paying VISAs, GST, and monitoring the available account balance.

### **Human Resources & People Management**

1. Ensure staff have the right technical and personal abilities to execute the operations and risk management accountabilities and to help further the UNA's mission.
2. Maintain a positive, healthy and safe work environment and culture in order to attract and retain employees.
3. Ensure a consistent performance management process for all staff which includes coaching, mentoring and monitoring performance on an on-going basis and taking corrective action including discipline as required.



4. Ensure compliance with human resources policies, procedures and practices.
5. Handle employee relations matters in the department.
6. Conduct regular team meetings, ensuring that tasks and procedures are implemented/completed.
7. Coordinate department projects and assign tasks and completion dates in order to meet deadlines.
8. Ensure timely and transparent communication with employees so they are kept apprised of UNA developments.

## SKILLS, QUALIFICATIONS AND EXPERIENCE REQUIRED

### Education requirements:

- Undergraduate degree, preferably in Commerce or Business Administration.
- Chartered Professional Accountant (CPA) designation is required.

### Experience requirements:

- Minimum of 5 years of experience at a professional level in business administration, finance or administrative services in non-profit organization or municipal setting.

### Technical knowledge, skills & abilities requirements:

- Expert skills in a recognized accounting software program
- Demonstrated effectiveness in proactive, efficient and confidential financial management, development and reporting
- Knowledge of human resources management and the ability to provide effective team leadership and to undertake all facets of managing and supervising staff
- Ability to establish and maintain effective internal and external relationships that involve wide range of stakeholders

### Soft skill requirements:

- Think Strategically – Assess options and actions based on trends and conditions in the environment, and the vision and values of the UNA.
- Build Relationships – Establish and maintain effective working relationships internally and externally to achieve the goals of the UNA.
- Creativity/Innovation – Develop new and unique ways to improve operations of the UNA and to create new opportunities.
- Focus on Community Needs – Anticipate, understand, and respond to the needs of internal and external members and residents to meet or exceed their expectations within the UNA parameters.
- Plan – Determine strategies related to the role's accountabilities to move UNA forward, sets goals, creates and implements actions plans, and evaluates the process and results.
- Lead – Positively influence others to achieve results that are in the best interest of the UNA.
- Make Decisions – Assess situations to determine the importance, urgency and risks, and make clear decisions which are timely and in the best interests of the UNA.
- Organize – Set priorities, develop a work schedule, monitor progress towards goals, and track details, data, information and activities.



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- Solve Problems – Assess problem situations to identify causes, gather and process relevant information, generate possible solutions, and make recommendations and/or resolve the problem.
- Communicate Effectively – Demonstrate excellent verbal and written communication skills.
- Foster Teamwork – Work cooperatively and effectively with others to set goals, resolve problems, and make decisions that enhance effectiveness.
- Adaptability – Demonstrate flexibility, versatility and tolerance in a changing work environment while maintaining effectiveness and efficiency.
- Discretion – Understand and demonstrate ethical behaviour and business practices.