



Position Synopsis and Purpose

(A position overview and how it connects to the big picture)

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 Information Technology and Finance, including Procurement. Responsibilities will include, but are not limited to, overseeing the infrastructure of technical operations, leading a team of 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 the municipality's strategic financial sustainability plan – which includes but is not limited to the annual budget process, grant funding, financial analysis, 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.



Major Responsibilities

(What this position does and how they allocate their time)

Description	Approx. Time Spent (%)
<p>Strategic Leadership and Oversight</p> <ul style="list-style-type: none"> • 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 • Oversees, administers and communicates the Town's operating and capital budgets • Acts as Treasurer under the Municipal Act • Prioritizes goals and plans to ensure fulfilment and completion of the Town's organizational and strategic goals • Ensures quality assurance and performance measurement programs in place and all operations adhere to Provincial regulations, standards and principles. • Develops and negotiates solutions to Finance and IT challenges along with responding to existing and emerging issues. 	30%

Description	Approx. Time Spent (%)
<ul style="list-style-type: none"> • Leads innovative approaches and provides direction to achieve high quality Financial and IT services in accordance with Council's Strategic Priorities. • Develops and implements both short and long-term objectives, the strategic mission and goals • Administrator for the Township's Financial Software System(Diamond) and Administrator for Township's Budgeting System(Questica) • Administrator of Township Credit Card Program (SpendDynamics) 	
<p>Leadership and Staffing</p> <ul style="list-style-type: none"> • Responsible for the planning, organizing, and directing of the municipality's Corporate Services Department. • Provides leadership, support, advice and motivation to staff both within Finance, IT and in inter-departmental teams while developing, recommending, establishing, and executing policies, programs and services in regular consultation with Council, stakeholders and senior management. • Participates with Senior Management Team in the development of the Corporate Plans as they relate to Finance and IT • 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 • Participates as a member of the Emergency Management Program Committee. • Plans, recruits and identifies development needs for staff within the department • Provides coaching and mentoring and conducts performance appraisals and determines/recommends disciplinary actions. • Continually evaluates the team activities to ensure appropriate allocation of resources, ensure meeting objectives and deadlines are met and makes recommendations for improvement. • 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 • Acts as CAO, if required. 	25%
<p>Council Relations</p> <ul style="list-style-type: none"> • Reports and provides advice to the Chief Administrative Officer, General Business and Finance Committee and Council on all Finance, IT, innovation and financial and business administration matters • Oversees and reports on the department's results to the rest of senior management and Council. • Provides strategic advice, legislative and legal advice to Council including setting the municipal vision, mission and goals • Promotes community engagement • Negotiates on behalf of the Town • Advocates to other governmental agencies on behalf of the Town • Ensures timely and consistent communication to stakeholders on progress, impacts and changes • Prepares reports and attends Council and Committee of the Whole meetings and provides advice to Council on Finance and IT matters. 	25%

Description	Approx. Time Spent (%)
<ul style="list-style-type: none"> • Guides responses and actions to public inquiries related to Town's Financial and IT services from various stakeholders. • Oversees and ensures the Town exceeds all obligations under relevant legislation and regulations • Monitors operations, projects and research within the service area to ensure safety, service quality, customer service, cost-effective and timely delivery of services • 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 • Provides updates to Council both orally and in writing on provincial and federal budgets and / or other legislation, highlighting the impact on municipalities • Evaluates quarterly and year-end performance against scorecard(s), coordinating information and data that enables operational departments to make informed decisions, through the use of objective and reliable data and advanced analytics • Ensures a corporation – wide adherence with the procurement policy 	
<p>Other</p> <ul style="list-style-type: none"> • Leads cross departmental teams and initiatives for the municipality as needed • Ensures focus is service excellence, customer service communication / transparency, innovation and data integrity and workflow integration • Work safely in accordance with the Occupational Health & Safety Act and related regulations. • Participate in corporate training • Other duties as required. 	20%

*Note: All activities are expected to be performed in a safe manner, in accordance with the Occupational Health and Safety Act and its Regulations, along with Corporate Safety policies, procedures and programs. In addition, all necessary personal protective equipment must be used and maintained in good condition.



Decision Making and Independence (Description of types of decision making and independence)

- 1. List up to 3 examples of the types of decisions that are made or issues/situations that are dealt with on a regular basis and how judgement is used to resolve them.**

Any issue that has been escalated to the Director but does not need to go to the CAO. Routine complaints of a serious, but within the scope of the budget / area of expertise.

Example 1 – Property Tax

The Director receives from a Councillor a request from a resident (who is also a business owner) to defer the payment of property taxes on both the residence and the business. The Director will collaborate with departmental staff and coordinate a response as follows:

- Review past correspondence, records, etc. and carry out discussions with other staff involved with the matter to gain an understanding of the history of the situation.
- Review claims made in the applicant's letter in comparison to the Director's understanding of the situation.
- Research applicable rules, regulations, standards (municipal by-laws, provincial legislation, legal precedent, good engineering practices, etc.) to evaluate whether there is support either the applicant's position or the decisions made by staff.
- Consult appropriate experts (consultants, lawyer, etc.) for advice on risk and liability associated with past or future decisions related to this case.
- Use professional experience and best judgment to determine possible solutions to rectify the situation, including potential compromises, while balancing the risk of establishing precedent which could impact decisions with respect to similar situations in the future.

Example #2 - Budget Preparation

The Director has the overall responsible for establishing the capital and operational budgets for the Town. The Director will collaborate with department-level and corporate staff (Deputy Treasurer, SMT, CAO, etc.) in preparing the budget as follows:

- Review trends in annual operating revenue and expenses (current year and past years) to determine baseline costs for the forthcoming budget year.
- Evaluate needs for changes to levels of service (staffing, materials, contracted services, etc.) and determine the associated cost implications to determine enhancements/reductions above/below the baseline operating budget.
- Review short-term and long-term capital infrastructure needs (asset rehabilitation/replacement forecasts, condition assessments, works to support development/growth, etc.) to develop a project list.
- Use experience, knowledge and best judgment to determine the appropriate scope of work needed for each respective project, while ensuring cost effective solutions and sound engineering principles are utilized.
- Develop cost estimates to determine the total project cost (i.e. planning, design and construction) required for each respective project.
- Assemble current year and 5-year capital project budgets, balancing risk/priority together with available funding sources (tax levy, water/sewer rates, reserves, grants, development charges, etc.) to optimize budget.
- Work with department heads and the Deputy Treasurer to meet the request of Council regarding increases
- Communicate capital/operating budgets to internal and external stakeholders, answer questions/inquiries and refine budgets as needed based on feedback/direction provided in order to support corporate priorities
- Report and present the budget to Council annually
- Report and present quarterly variations to Council

2. List up to 3 examples of situations or problems that are referred to the supervisor for direction or resolution.

- Anything that has to go into closed session with serious legal / financial implications
- Issue/occurrence that would be considered abnormal, unusual, beyond their level of experience, outside of their comfort level or of a particularly sensitive nature.
- Multi-million dollar development negotiations



Required Training (Description of training required in order to perform the major responsibilities)

All training that is required to maintain CPA in good standing. As a minimum, 4 hours of annual Ethics Training is required as well as 120 hours of professional training within a three-year period.

In addition, leadership training, diversity training and conflict resolution training. Attendance at Workshops and Seminars pertaining to legislative changes impacting Municipalities is also required.



Minimum Qualifications (Absolutely cannot do without)

Education (degree/diploma/certifications)

- University Degree in Business Administration, Finance & Accounting Major
- Professional accounting designation-CPA

Experience

Minimum of seven (7) years of supervisory experience, preferably in a unionized setting.

Knowledge/Skill/Ability

The position requires highly developed analytical and business planning capabilities, excellent written and oral communication, interpersonal, organizational and effective leadership skills.

- A commitment to the vision and mission of the Township;
- Comprehensive knowledge of the Municipal Act together with all related legislation and regulations;
- High level experience and knowledge concerning IT infrastructure, network administration and system security
- Project Management and Process Improvement skills;
- Proven leadership and mentoring abilities; team building and staff management skills following an individualistic approach;
- Demonstrated ability to prepare and analyze comprehensive reports and legislation;
- Extensive knowledge in dealing with accounting systems, budgets, internal controls, business planning and asset management;
- Thorough knowledge of tax administration, payroll, accounts payable and accounts receivable processes;
- Thorough knowledge of procurement practices, legislation and processes;
- Excellent communication skills both written and oral;
- Effective attention to detail and a high degree of accuracy;
- Sound analytical thinking, planning, prioritization and execution skills;
- High level of integrity, confidentiality and accountability;
- High degree of resourcefulness, flexibility and adaptability;
- Strong work ethic and positive team attitude;

- Ability to build and maintain lasting relationships with internal and external stakeholders including Council, other departments, key business partners and government agencies;
- Well-defined sense of diplomacy, including solid negotiation and conflict resolution.



Preferred Qualifications (The Ideal Candidate)

Education (degree/diploma/certifications)

All of the above, with the addition of:

- MBA with specialization in Finance/Accounting
- Completion of the AMCTO Municipal Finance & Accounting (MAFP) and Ontario Municipal Tax & Revenue Association Municipal Tax Administration Program (MTAP)
- Completion of AMCTO Municipal Administration Program (MAP) and hold Accredited Municipal Clerk/Treasurer (AMCT) or Certified Municipal Officer (CMO) an asset

Experience

- Senior experience in the broader public sector in a complex, unionized environment an asset;



Work Setting (Description of the work environment and nature of people interactions)

Contacts

Frequency Legend
Constant – every day for most of the day
Frequent – daily
Regular – weekly
Occasional – bi-weekly to monthly

Contact	Frequency	Nature of Interaction
Finance and IT Department Staff	Constant	Collaboration, problem solving. Leadership and mentoring, providing advice
Senior Management	Frequent	Providing Financial Guidance, collaboration, problem solving
Township Staff-other	Frequent	Providing Guidance and problem solving
Other Municipal Treasurers	Regular	Collaboration, problem solving and mentoring
Members of Council	Occasional	Providing Financial Guidance and Problem Solving Issues. Presentation to Committee and Council meetings, both written and oral
Members of the Public	Occasional	Listening to concerns, resolving issues and providing information or advice

Contact	Frequency	Nature of Interaction
External Auditor	Occasional	Providing answers to audit questions and ensuring both internal and external audits run smoothly
Other Levels of Government	Occasional	Listening to concerns, resolving issues and providing information
Vendors	Occasional	Resolving issues, negotiating pricing, collaboration on projects
Lawyer	Occasional	Seeking legal advice or opinions as required
Insurance Brokers/Consultants	Occasional	Negotiating Contracts and resolving issues. Asking for clarification as issues arise.
MPAC (Municipal Property and Assessment Corporation)	Regular	Discussing and resolving property tax and assessment issues.
Township Banks	Occasional	Resolving Issues
Other Levels of Government	Occasional	Inquiries regarding programs, clarification of legislative matters, seek clarification on granting opportunities, provide information to other levels of government as required

Work Conditions/Physical/Mental Effort

Please check off all that apply

Frequency Legend
Constant – every day for most of the day
Frequent – daily
Regular – weekly
Occasional – bi-weekly to monthly

1. Hours of Work

Normal (i.e. 8:30 am – 4:30 pm, Monday to Friday)	<input checked="" type="checkbox"/>
Evenings/Weekends	<input checked="" type="checkbox"/>
On-Call	<input checked="" type="checkbox"/>
Over-time (How often? Expand below)	<input checked="" type="checkbox"/>

Examples:

Attending Council meetings outside of normal business hours

2. Work Environment

	Constant	Frequent	Regular	Occasional	Percentage
Indoors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100%
Outdoors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
					=100%

Attend internal/external meetings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	%
Time spend travelling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	%
Frequency of interruptions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-
Interaction with irate/aggressive clients/customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-

Examples:

- Regular and ongoing exposure to political pressures, interruptions and employee relations issues
- Requirement to deal with difficult employee relations issues, terminations and other emotional situations
- Required to interact with taxpayers in emotionally charged situations; at stage of my involvement, taxpayer is often in danger of losing their home through a mortgage company power of sale or Town initiated Tax Sale Registration

3. Hazards

	Constant	Frequent	Regular	Occasional
Noise	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fumes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dirt, Dust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazardous chemicals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disagreeable weather conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Examples:

This position works in a safe work environment, with no real hazards. The noise in the office can make it difficult to concentrate.

4. Physical Requirements

	Constant	Frequent	Regular	Occasional
Operating and/or maintaining vehicles and equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Sitting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Walking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Climbing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requirement to lift objects (list max weight)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pushing and/or pulling objects to complete tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPE worn on a regular basis (list type):				
•	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
•	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
•	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Types of tools used (list type):				
•	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
•	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
•	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Examples:

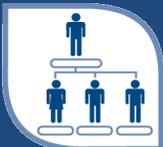
This position has no physical requirements but will require extended periods of sitting at a workstation. Desks are available to accommodate a sitting/standing workday. Council meetings require extended periods of time sitting, with no options to stand or move.

5. Mental Requirements

	Constant	Frequent	Regular	Occasional
Requires awareness of surroundings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visual effort required on a concentrated basis	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requirement to listen attentively	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Examples:

- Spends a significant amount of time writing and reading reports; use of computer, laptop, iPad, communications device (i.e. cell phone) available
- Requirement to deal with difficult employee relations issues, terminations and other emotional situations

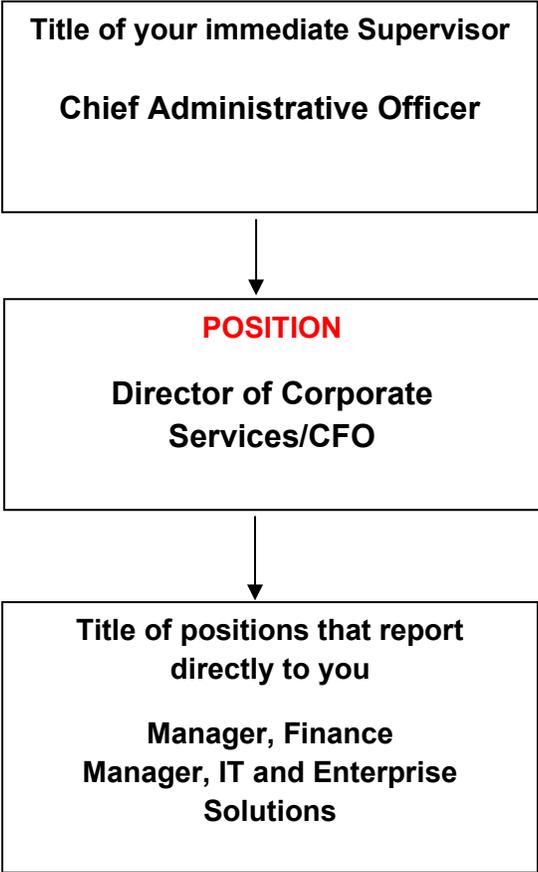


Position Classification
(Where this position fits)

Position Title: Director of Corporate Services/CFO	Division:
Department: Corporate Services	Classification:
Work Location: Town Hall	Reports to (Direct): CAO
Position(s) Supervised Directly: <ul style="list-style-type: none"> • Manager of Information Technology • Deputy Treasurer • 	Position(s) Supervised Indirectly: <ul style="list-style-type: none"> • Accounting Clerk General/Secretary • Accounts Receivable/Payable/Tax Clerk • Water & Tax Clerk • IT Helpdesk • Asset Management and GIS Coordinator • Property Tax and Payroll Coordinator
Effective Date: May 2020	Revision Date: February 2026
Salary Range: \$131,072.36 - \$160,751.76	Hours per Week: 35

Organizational Chart

List the reporting relationship of this position to others within the immediate department.



Created: May 2020
Revised: February 2026