



# Tūranga Mahi / Position Description:

## *Strategic Financial Planner*

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At Rotorua Lakes Council, we are driven by the **purpose** for our existence, - by our 'why'. Our 'why' is our customers. We come to work each day to deliver services for our customers, and we keep them at the centre of our organisation's culture. We are committed to building a high performing culture based on our **purpose**.

'How' we work together is defined by our organisational culture and values. What each person does differs from role to role and will change based on the work programme approved by our Elected Council. The tasks that we do in each role are not a purpose in themselves, their purpose is to serve our customers.

To be successful in the role, and to enjoy your employment at RLC by achieving significant results for the community, you will need to take to heart and live the sentiment "The organisation's success is my success – my job is only done when everyone's job is done".

Rotorua Lakes Council is one of the largest employers in Rotorua, building a positive future for our district with approximately 78,000 residents, and visitors numbering in the millions. We are determined to be among the best councils in New Zealand and are committed to continually improve the service provided to our customers, both external and internal.

Rotorua is in the heart of the Te Arawa region. 40% of the population are Māori. Being a bicultural city provides a foundation for us to recognise and celebrate our increasing diversity which enriches us as individuals and as a multi-cultural community. Employment at RLC is a unique opportunity to develop your understanding and appreciation of Te Ao Maori, in order to better serve our whole community. As a senior leader in the organisation, you have a key responsibility to lead our people in adhering to our legislative responsibilities to mana whenua.

A top priority is to ensure the health and safety of our people at work. We want you to go home healthy and safe each day. Safety is everyone's job – all of our staff have a shared responsibility to manage our work environments to prevent harm, and to actively engage with health and safety initiatives and procedures. Managers are responsible for the health and safety of the areas and people under their leadership.

Rotorua Lakes Council has statutory responsibility for Civil Defence and Emergency Management (CDEM) within the district. This responsibility extends to all staff, who may be called upon to undertake CDEM roles in addition to their position specific responsibilities.

We are one team. To be successful, it is important that all staff are aligned to and actively support the organisation's direction, working collaboratively, and actively participating in activities and initiatives to advance the organisation.

The position description below describes the specific requirements of this position. The description within this position description is not an exhaustive list of responsibilities or tasks and staff are expected to contribute to the organisation through other tasks and activities assigned by their manager. In addition, you are also expected to be proactive in knowing and following Council policies and procedures.



| TE ĀHUA O TE MAHI - POSITION SPECIFICATION                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| <b>MAHI - POSITION:</b>                                      | Strategic Financial Planner                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>RANGATIRA - REPORTS TO:</b>                               | Financial Controller                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>KĀHUI - GROUP:</b>                                        | Finance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>TAUNGA MAHI - LOCATION:</b>                               | Civic Centre                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>PŪTAKE - POSITION PURPOSE:</b>                            | <ul style="list-style-type: none"> <li>Primarily responsible for the development of the Council's annual financial plan and long-term financial plan, including undertaking strategic projects and policy development that support these.</li> <li>Provide strategic financial planning and sound financial management advice to the Financial Controller CFO to ensure that Rotorua Lakes Council's overall objectives are met while a sound financial position is maintained.</li> <li>Ensure a high standard of corporate budgeting, financing, accounting and reporting which enables Council to set realistic funding for its activities.</li> <li>Manage treasury function and relations with key financial parties.</li> </ul> |
| <b>NGĀ WHAKARITENGA - DELEGATIONS</b>                        | Direct reports: <ul style="list-style-type: none"> <li>0</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>HONONGA WAIWAI – KEY RELATIONSHIPS: Rāroto - Internal</b> | <ul style="list-style-type: none"> <li>Mayor and Elected Members</li> <li>Te Tatau o te Arawa</li> <li>CE's Group</li> <li>Manahautū Te Arawa Partnership</li> <li>Destination Development</li> <li>Organisational Performance &amp; Innovation</li> <li>Infrastructure &amp; Assets</li> <li>Chief Financial Officer</li> <li>People &amp; Culture</li> <li>Community Experience</li> </ul>                                                                                                                                                                                                                                                                                                                                          |
| <b>HONONGA WAIWAI – KEY RELATIONSHIPS: Rāwaho - External</b> | <ul style="list-style-type: none"> <li>Council stakeholders</li> <li>Contracted service providers</li> <li>Technical professionals in your field</li> <li>Consultants and Contractors</li> <li>Auditors</li> <li>Mana whenua</li> <li>Neighbouring local authorities</li> <li>Mayor and Elected Counsellors</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                |



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| <b>HONONGA WAIWAI – KEY RELATIONSHIPS: Rāwaho - External</b> | <ul style="list-style-type: none"> <li>• Local Government New Zealand (LGNZ)</li> <li>• Media and professional groups</li> <li>• Regional Council</li> <li>• Chamber of Commerce</li> <li>• Te Arawa Entities</li> <li>• Rotorua Community &amp; Partnership</li> <li>• Police</li> <li>• Māori Wardens</li> <li>• Neighbourhood support</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>NGĀ MAHI MATUA - KEY ACCOUNTABILITIES:</b>                | <p><b>Strategic Financial Management</b></p> <ul style="list-style-type: none"> <li>• Working closely with the Financial Controller, facilitates the development of the annual plan and LTP, including development of assumptions for use in the LTP.</li> <li>• Provides senior level financial analysis and expert financial advice in the annual plan and LTP processes as required.</li> <li>• Ensure complete research and preparation is completed for short and long term strategic, financial and business plans.</li> <li>• Monitors impending new legislation and provides strategic advice to Council.</li> <li>• Manage the development of assigned Council financial policies (eg. the revenue and financing, rate collection, remission, liability management and investment policies).</li> <li>• Manage and lead corporate projects (eg. LTP, annual plan and financial policies) within agreed timeframes.</li> <li>• Prepare project plans and timetables for assigned projects.</li> <li>• Manages LGA special consultation procedure for LTP, Annual Plan and Policy reviews.</li> <li>• Review Councils financial policies to ensure that economic instruments are available to the Council are contributing towards achieving community outcomes and delivery of the LTP.</li> <li>• Overseas Grant accountability reporting.</li> </ul> <p><b>Other Duties:</b><br/> Work with the Finance Business Improvement &amp; Systems Leader to develop annual plan and LTP financial budgeting models within the new ERP system.</p> <p><i>NB: the key accountabilities listed above are not an exhaustive list. You may be expected to undertake additional delegated responsibilities in the course of your employment that are consistent with the purpose of your role.</i></p> <p>There will also be the annual delivery of agreed KPIs.</p> |

**TE ĀHUA O TE TANGATA - PERSON SPECIFICATION**



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| <b>NGĀ MAHI MATUA - FORMAL QUALIFICATIONS:</b><br>(Ngā matau ā-wheako rānei - Or experience recognised as equivalent) | <b>Required</b> <ul style="list-style-type: none"> <li>CA (or equivalent) qualified with 3+ years' experience in Treasury, Strategic Financial Management and budgeting and reporting.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>NGĀ PŪKENGĀ - POSITION SPECIFIC COMPETENCIES AND ATTRIBUTES</b>                                                    | <ul style="list-style-type: none"> <li>Proven skills in financial risk management, budgeting and reporting.</li> <li>Track record in effective internal and external relationship management.</li> <li>In depth knowledge of the Local Government Act 2002 and Local Government Rating Act 2002 or proven ability to operate effectively in a similarly regulated environment.</li> <li>High level of analytical, conceptual, and problem-solving abilities as well as an ability to provide commercial insight and interact with all levels of the organisation.</li> <li>Proven ability to work under pressure and deliver high quality information both orally and in writing within required timeframes.</li> <li>Good understanding of compliance with Treasury Management Policies, and proven experience in managing bank and investment relationships and the mitigation of interest rate risk, funding risk and liquidity risk.</li> <li>Proactive engagement and acceptance of accountability.</li> <li>Demonstrated innovative thinking and planning abilities, balanced with pragmatism and an ability to respond to ambiguity</li> <li>An ability to actively facilitate cross organisational and cross functional services and collaboration in a matrix structure</li> <li>A strong process driven approach and ability to continuously identify opportunities for the Finance team to add value to Council.</li> <li>Ability to facilitate group discussions to identify underlying issues, generate solutions and gain buy-in.</li> </ul> |



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| <b>NGĀ MĀTĀPONO:<br/>VALUES</b> | <p style="text-align: center;"><b>Tai Kawenga – The Flowing Tide</b></p> <p style="text-align: center;">Tai means tide or current</p> <p><b>Kawenga</b> refers to values - Those things we carry inside us, and those things that carry us - in our day-to-day lives. Those principles that we value are the ones we take with us.</p> <p style="text-align: center;"><b>Purpose</b></p> <p style="text-align: center;">Speaks to why we exist and it is expressed through three ideas that reflect our vision</p> <p style="text-align: center;">😊 Customer focused 🤝 Community driven 🧑‍🌾 People at the heart</p> <p style="text-align: center;"><b>Promise</b> 🤝</p> <p style="text-align: center;">What we commit to delivering, every day</p> <p style="text-align: center;"><b>Practices</b> 😊</p> <p style="text-align: center;">How we behave</p> <p style="text-align: center;"><b>Principles</b> ✨</p> <p style="text-align: center;">The values we believe in and stand by:</p> <p style="text-align: center;">Stronger together - Lead with integrity - Challenge and innovate - Steward our future</p> |
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