

Position Description

Position Title: Financial Officer

Date Established: November 1, 2005

Date Revised: April 2011

Reporting Relationships:

- Reports to the Executive Director
- One direct report, the Financial Assistant

Position Summary:

The Financial Officer is responsible for the finances and annual fundraising of the Society. The Financial Officer participates in the strategic growth planning and development of the Society. The Financial Officer advances the vision, mission and values of the Society.

Accounting Responsibilities

- Ensure all accounting functions comply with Society policies
- Prepare financial statements and financial management reports
- In collaboration with the Executive Director, prepare the annual operations and capital budgets
- Ensure compliance with relevant legislation, regulations, standards and professional guidelines, recommending policy changes as required
- Prepare financial documents for annual audit and other audits as required

Human Resource Responsibilities

- Recruits, selects, trains, supervises and evaluates financial staff
- Ensure the implementation of payroll, benefits complies with Society policies
- Ensure conditions of employment relating to compensation comply with the terms and conditions covered by the union collective agreement
- Maintain a harmonious and mutually beneficial relationship with the union

Fundraising Responsibilities

- Ensure annual fund raising activities meet budgetary requirements and comply with Society policies, recommending policy changes as required
- Ensure accurate tracking and recognition of donors and sponsors
- Prepare grant proposals for capital and program funding

Organizational Responsibilities:

- Actively participate on the Leadership Team
- Actively participate in strategic planning and implementation of the annual strategic plan
- In collaboration with the Leadership Team, maintain the Risk Management strategy
- In collaboration with the Executive Director, report financial data to the Board of Directors

Core Competencies:

- Communication: Conveys and receives messages clearly
- Teamwork: Works cooperatively with others to achieve organizational goals
- Initiative: Plans ahead, is resourceful in taking action and generating viable solutions
- Client Service: Understands client needs and provides high standards of service
- Attitude: Conveys an open, flexible mindset with a focus on positive outcomes
- Self-Management: Understands and manages own behaviour and practices healthy self-care

Leadership Competencies:

- Strategic Thinking: Employs a big picture, long-range view of achieving organizational goals
- Resource Management: Plans, implements and monitors effective use of all resources
- Team Leadership: Inspires and motivates team members. Guides team towards achieving organizational goals

Qualifications:

- Post secondary accounting education is required, CGA designation is preferred
- Proficiency in Simply Accounting, Word, Excel and payroll are required
- Team leadership and supervisory experience is required
- Strong organizational skills, initiative and the ability to produce accurate, timely financial reports are required
- Fund development experience preferred
- Experience working with not-for-profit and/or health care service providers a definite asset
- Proven success in grant writing an asset