

# JOB DESCRIPTION

<b>TITLE</b>	<b>NAME</b>	
Director, Finance Services and Systems		
<b>CLASSIFICATION</b>	<b>PROGRAM, FUNCTION, AREA, ETC.</b>	<b>DEPARTMENT</b>
18	Finance	Corporate Services
<b>REPORTS TO (POSITION):</b> Vice President, Corporate Services		

**PURPOSE:**

The Director, Financial Services and Systems is responsible for leading CPAWSB’s enterprise-wide financial planning and analysis, finance operations and reporting, and financial systems to support effective decision-making and long-term organizational sustainability. Reporting to the Vice President, Corporate Services, this role serves as a strategic partner to the Executive Team and leaders across the organization, translating strategy into financial plans, performance insights, and resource allocation decisions.

The Director owns the design and delivery of integrated financial planning processes, including budgeting, rolling forecasts, scenario modeling, and variance analysis, ensuring financial insights are forward-looking, actionable, and aligned with organizational priorities. The role is accountable for developing clear, concise, and board-ready quarterly and annual financial reporting that communicates not only results, but key drivers, risks, trade-offs, and recommended actions.

In addition, the Director leads the evolution of financial services, systems, and data governance frameworks to enhance efficiency, accuracy, and transparency. This includes oversight of financial operations and internal controls, while advancing modern, scalable processes and systems that support high-quality reporting and insight generation across the organization.

Through strong business partnership, the Director builds organizational capability, challenges assumptions, and proactively identifies opportunities and risks. The role balances stewardship with enablement, ensuring compliance and sound financial management while empowering informed, timely decision-making that advances CPAWSB’s mission, strategic objectives, and long-term sustainability.

**KEY RESPONSIBILITIES**

**Responsibility 1: Strategic Financial Leadership and Business Partnership**

- Serve as a strategic financial advisor to the Vice President, Corporate Services, Executive Team, and organizational leaders, providing expert financial advice, insight, and recommendations to support informed decision-making.
- Provide technical financial expertise and advice to the extended management team (Executive, Directors, Managers) to support understanding of financial reports and effective management of financial responsibilities.
- Translate CPAWSB’s strategic priorities into financial plans, targets, and resource allocation decisions that enable achievement of organizational goals and long-term sustainability.
- Lead enterprise-wide financial planning activities in partnership with business leaders, ensuring alignment between strategy, operational plans and financial outcomes.
- Contribute to the development of operational plans and key performance indicators (KPIs), challenging assumptions and providing financial analysis and guidance to support effective decision-making.
- Enhance the quality and consistency of financial decision-making across the organization through clear insight, analysis and guidance.
- Build strong, collaborative relationships across the organization to develop a deep understanding of programs, funding models, cost-drivers, and operational realities, ensuring financial advice and analysis are relevant and actionable.
- Partner proactively with leaders to evaluate initiatives, assess trade-offs, and challenge assumptions, providing clear financial perspective to support organization decision-making.
- Identify and communicate emerging risks, opportunities, and trends, bringing forward timely insights and recommendations that enable proactive management and improved organizational performance.

**Responsibility 2: Financial Planning, Forecasting, and Performance Management**

- Own and lead enterprise-wide budgeting, forecasting, and multi-year financial planning processes.
- Design and maintain driver-based financial models to support scenario analysis, strategic planning, and decision-making.
- Deliver timely and insightful variance analysis, linking financial results to operational drivers and clearly identifying required actions.
- Evolve planning practices from static budgeting toward dynamic, scenario-based forecasting and performance management.
- Establish and monitor key financial and operational performance indicators (KPIs) aligned to strategic objectives.
- Provide board-ready financial reporting, including clear commentary on performance, risks, and forward outlook.

**Responsibility 3: Finance Services and Operational Excellence**

- Provide leadership and oversight of finance operations, including accounting, financial reporting, payroll, accounts payable/receivable, and cash management, ensuring effective controls and service delivery.
- Ensure accurate, timely, and compliant quarterly and annual financial reporting in accordance with applicable standards and regulatory requirements, and ensuring all accounting principles are respected.
- Establish appropriate delegation, accountability, and service standards across finance operations to enable efficiency and consistency.
- Lead continuous improvement initiatives to streamline processes, reduce manual effort, and enhance the quality and timeliness of financial services.
- Ensure finance services are delivered as a responsive, value-added function that supports internal stakeholders and organizational priorities.
- Establish and maintain service standards for finance services, ensuring a responsive, partner-focused approach that meets the need of internal business partners.

**Responsibility 4: Finance Systems, Data and Reporting Architecture**

- Lead the strategy, implementation, and continuous improvement of finance systems, including ERP and financial planning tools.
- Establish and maintain data governance frameworks, including consistent definitions, data standards, and reporting structures across the organization
- Design and evolve financial reporting architecture, including dashboards and management reports that provide clear, actionable insight.
- Drive automation and system-enabled efficiencies in financial processes and reporting.
- Own the finance system roadmap and partner with Information Services and other functions to ensure alignment of systems, data integrity, and integration across platforms.

<ul style="list-style-type: none"> <li>• Ensure financial data is accurate, accessible, secure, and structured to support decision-making and reporting requirements.</li> </ul>
<p><b>Responsibility 5: Governance, Risk Management and Compliance</b></p> <ul style="list-style-type: none"> <li>• Develop, implement, and maintain robust financial policies, procedures, and internal controls to safeguard organizational assets and ensure accountability.</li> <li>• Lead the annual audit process and ensure audit readiness, including preparation of financial statements and supporting documentation.</li> <li>• Ensure compliance with all regulatory, tax, and reporting requirements.</li> <li>• Establish and oversee delegation of authority frameworks and financial governance structures.</li> <li>• Monitor financial risks and ensure appropriate mitigation strategies are in place.</li> <li>• Balance strong financial stewardship with enabling operational flexibility and effective decision-making.</li> </ul>
<p><b>Responsibility 6: Insight, Reporting, and Decision Support</b></p> <ul style="list-style-type: none"> <li>• Translate financial data into clear, compelling insights that explain performance, key drivers, risks, and implications for decision-making.</li> <li>• Design and deliver concise, high-quality executive and board reporting materials that stand on their own and focus attention on what matters most.</li> <li>• Move beyond standard reporting to provide forward-looking analysis and actionable recommendations.</li> <li>• Apply strong data visualization and storytelling techniques to enhance understanding and drive action.</li> <li>• Ensure reporting is aligned with organizational priorities and supports timely, effective decisions.</li> </ul>
<p><b>Responsibility 7: People Leadership and Organizational Capability</b></p> <ul style="list-style-type: none"> <li>• Lead, mentor, and develop a high-performing finance team, fostering a culture of accountability, continuous improvement, and professional growth.</li> <li>• Build and strengthen financial planning and analysis capability within the team.</li> <li>• Foster financial literacy and acumen across the organization through coaching, education, and collaboration.</li> <li>• Lead change initiatives related to finance transformation, systems, and process improvements, supporting adoption across people, processes, and technology.</li> <li>• Promote a collaborative, inclusive, and values-driven team environment aligned with CPAWSB's culture and priorities.</li> </ul>
<p><b>KNOWLEDGE and EXPERIENCE:</b></p> <ul style="list-style-type: none"> <li>• A minimum of 10 years of progressively responsible experience in financial leadership with increasing scope and decision-making authority, including at least 5 years in a senior leadership capacity.</li> <li>• CPA designation</li> <li>• Undergraduate degree in Business, Finance, Accounting, or a related field</li> <li>• Demonstrated experience leading financial planning and analysis functions, including budgeting, forecasting, variance analysis, and multi-year financial planning in a complex organizational environment.</li> <li>• Proven ability to develop financial models, scenario analysis, and driver-based planning approaches to support strategic and operational decision-making.</li> <li>• Experience supporting executive and board-level decision-making, including preparation of clear, concise, and insightful financial reporting.</li> <li>• Demonstrated experience leading or contributing to finance transformation initiatives, including process improvement, modernization, or implementation of new financial practices or frameworks.</li> <li>• Experience with financial systems (ERP) and reporting tools, with the ability to leverage systems to improve data quality, reporting, and decision support; experience with system implementation or optimization is an asset.</li> <li>• Strong understanding of financial management, accounting principles, internal controls, and compliance requirements, ideally within a not-for-profit or multi-stakeholder environment.</li> <li>• Demonstrated experience developing and implementing budgets and business planning frameworks in a complex, multi-partner environment.</li> <li>• Exceptional financial analysis, budgeting, and forecasting skills, including experience developing financial models, scenario analysis, and driver-based planning.</li> <li>• Experience working collaboratively with business partners to support and influence executive decision-making, managing sensitive issues with discretion, and leading teams through change and transformation.</li> <li>• Advanced proficiency in Microsoft Office Suite, particularly Excel; experience with financial and data visualization tools is an asset.</li> <li>• Experience with Microsoft Dynamics Great Plains, an asset</li> </ul>
<p><b>SKILLS and ABILITIES:</b></p> <ul style="list-style-type: none"> <li>• Excellent leadership abilities, with a demonstrated track record of building, developing, and leading high-performing teams.</li> <li>• Outstanding communication (oral and written) and presentation skills, with the ability to clearly articulate complex financial concepts to diverse audiences, including Executive and Board-level stakeholders.</li> <li>• Strong strategic mindset, with the ability to translate organizational strategy into financial plans, performance measures, and actionable insights.</li> <li>• Advanced financial analysis, critical thinking, and problem-solving skills, with the ability to synthesize complex data and identify key drivers, risks, and opportunities.</li> <li>• Demonstrated ability to translate financial data into clear insights and compelling narratives that support decision-making and drive action.</li> <li>• Proven ability to influence and support executive decision-making, including the ability to challenge assumptions, present trade-offs, and provide clear recommendations.</li> <li>• Strong understanding of financial planning, forecasting, and performance management, including the ability to develop and interpret models and scenarios.</li> <li>• Ability to lead change and transformation initiatives, including implementation of new processes, systems, and ways of working, while supporting team and organizational adoption.</li> <li>• Demonstrated ability to work collaboratively and build strong relationships across all levels of the organization, fostering financial understanding, accountability, and shared ownership of results.</li> <li>• Strong organization and time management skills, with the ability to manage competing priorities, complex projects, and tight deadlines.</li> <li>• High degree of judgment, discretion, and professionalism in managing confidential and sensitive information.</li> <li>• Ability to leverage financial systems, data, and reporting tools to improve efficiency, accuracy, and insight generation</li> <li>• Demonstrates and promotes CPAWSB's values of: Excellence, Integrity, Collaboration, Innovation, Responsiveness, and Equity, Diversity, and Inclusion.</li> <li>• Ability to read, write and speak English fluently.</li> </ul>

<b>SIGNATURES:</b> The signatures below indicate that the incumbent and supervisor have read, discussed, and agreed that the information accurately reflects the work assigned.		
<b>INCUMBENT SIGNATURE:</b> I certify that I have read and understood the responsibilities assigned to this position.		
Click here to enter text.		Click here to enter text.
<b>Name</b>	<b>Signature</b>	<b>Date</b>
<b>SUPERVISOR SIGNATURE:</b> I certify that this job description is an accurate reflection of the responsibilities assigned to this position.		
Click here to enter text.		Click here to enter text.
<b>Name</b>	<b>Signature</b>	<b>Date</b>