



The City of Orillia is hiring a **Senior Financial Planning Analyst**

The City of Orillia is less than 90 minutes from the Greater Toronto Area. Even though growth and progress have been strong in recent years, the Sunshine City has worked hard to retain the small-town charm that has captivated generations. The quality of life is unbeatable in this city surrounded by two lakes, where outdoor pursuits are available in all seasons and are enjoyed by both visitors and residents.

The City of Orillia is currently seeking a highly motivated individual to fill the position of **Senior Financial Planning Analyst**.

This position provides direct support to the Deputy Treasurer and the Chief Financial Officer / Treasurer while assisting Managers and operational staff across the organization. The role will collaborate with the Deputy Treasurer and related parties in the preparation, presentation and ongoing monitoring of the City's 10-year capital and reserve forecast, annual operating/capital budgets, forecasts and special projects. This includes compilation of the annual operating and capital Budget Books, preparation of budget presentations, and payroll and staffing budget analysis. The Senior Financial Planning Analyst will ensure compliance with the budget and City policies, accuracy of all financial information including proper authorization, funding and expenditures. Prepares financial and analytical analysis and sound financial calculations to formulate and/or support recommendations, completes reconciliations and journal entries as required. This dynamic role is responsible for the creation, coordination and processing of financial analysis, financial reporting, accounting treatments, etc.

Candidates must have a University Degree in Business Administration, Accounting or Finance with a minimum of three years of relevant financial reporting and budgeting experience, preferably in a Municipal government. Chartered Professional Accountant (CPA) Designation and member in good standing is an asset.

The City of Orillia offers a competitive salary and optional enrollment in the OMERS pension plan. The salary for this position is \$93,605 to \$109,505 based on a 35-hour work week.

Interested candidates with the required qualifications are welcome to submit their resume and letter of interest by **October 23, 2026 at noon**.

Applications will only be accepted by applying online: orillia.hiringplatform.ca/list/careers.

We thank all applicants, however, only those selected for an interview will be contacted.

Note: The City of Orillia is committed to an inclusive, barrier-free environment. Accommodation will be provided in all steps of the hiring process. Please advise the City of Orillia Human Resources Department if you require any accommodations to ensure you can participate fully and equally during the recruitment and selection process. We thank all applicants that apply and advise that only those to be interviewed will be contacted. In accordance with the Municipal Freedom of Information and Protection of Privacy Act, personal information is collected under the authority of the Municipal Act 2001, S.O.

2001, c. 25., and will be used for the purpose of candidate selection. Questions about this collection should be directed to the Freedom of Information Coordinator, City of Orillia, 50 Andrew St. S., Orillia ON L3V 7T5.

Senior Financial Planning Analyst Job Description



Position Synopsis and Purpose

The role is responsible for coordinating key components of the City's financial planning, budgeting, forecasting and financial reporting. Working closely with Managers and staff, this position develops and maintains long-range financial plans providing a 10-year fiscal and economic outlook, including trends in the levy, reserves and reserve funds, debt, user fees, etc. The position also collaborates to develop annual operating and capital budgets, including assumptions, estimates and strategies, overseeing budget transfers, supplementary approvals and adjustments. The role serves as a key point of contact with internal divisions and external agencies for financial analysis and reporting, forecasting, grant review, reporting and submissions, as well as external agencies and other government bodies ensuring effective communication across stakeholders.



Major Responsibilities

Description	Approx. Time Spent (%)
Budget and Financial Management - Work closely with departments and senior staff to support the development and maintenance of the annual operating and capital budgets, preparing key assumptions, estimates, and providing analytical input to guide strategic decisions. - Coordinate and compile the annual operating and capital Budget Books, including consolidation of departmental submissions, financial schedules and quality review. - Prepare and maintain payroll and staffing budget models, including salaries, wages, benefits, vacancies, position changes and other compensation assumptions. - Monitor and report on operating and capital budgets, year-end projections, and program variances. - Ensure full reconciliation of the budget with the general ledger and appropriate year-end funding. - Administer capital project financing by tracking expenditures and allocating funding sources (reserves, debt, grants, etc.). - Maintain and administer budgeting and forecasting systems, including investigating and recommending functionality enhancements.	35%

- Collaborate with the Deputy Treasurer in the preparation, presentation and ongoing monitoring of the City's 10 year capital and reserve forecast. - Support asset management planning efforts and ensure financial alignment with long-term capital investment needs.	
Analysis and Reporting - Prepare complex financial analysis, reports, and presentations to support decision-making by CFO/Treasurer, Divisions, the Senior Leadership Team, and Council. - Conduct cost-benefit analyses, what-if scenarios, and other evaluative tools to identify financial strategies and support informed prioritization. - Contribute to the preparation of the Financial Information Return (FIR) and year-end financial statements. - Develop and maintain records and submit external funding reports (e.g., Gas Tax, OCIF).	35%
Policies/Programs/Service Delivery - Develop, implement, and maintain financial policies, procedures, and internal control documentation, reflecting best practices - Champion inter-departmental co-operation and collaboration on project development, delivery, and operational needs. - Provide technical support and input for day-to-day operations of the systems, including budgeting, reporting, financial transactions, systems, analysis, business case development and report writing. - Ensure compliance with financial procedures across departments and assist in the communication and clarification of finance-related processes. - Maintain documentation and training materials related to budget development, workflows and reporting tools.	20%
Administration - Respond promptly and appropriately to internal and external inquiries related to financial planning, budgeting, reporting, and transactions. - Participate in regular meetings and provide ongoing support to divisions delivering guidance on financial processes and decisions. - Support the Deputy Treasurer, Chief Financial Officer / Treasurer, and other divisions with formal reporting obligations and documentation preparation for Council and Senior Management Team meetings. - Develop, implement corporate software, administrative tools, and reporting systems to effectively support divisional operations and align with corporate goals and priorities. - Lead or support divisional initiatives and special projects to improve administrative tools and align financial systems with strategic objectives. - Develop and deliver training on Enterprise Resource Planning systems and budgeting tools, financial policies, while supporting their ongoing optimization.	10%

*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

1. 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.

- Use discretion and financial judgment when reviewing and determining project funding strategies to avoid overstating available resources, overcommitting reserves, or triggering compliance issues with obligatory funds and reporting bodies. Inaccurate funding or misstatements may result in delays to financial reporting, incorrect financial positions or misuse of funds.
- Apply sound professional judgment in assessing budget submissions, challenging unsupported estimates, identifying risks and/or errors. Inaccurate budget estimates may result in misallocated resources, service delivery impacts, misrepresentation to Council or budget shortfalls.
- Prepare projections and forecasts, considering current trends, historical data, and input from departments using financial knowledge and judgement to guide and support divisions and Senior Leadership Team in making time-sensitive decisions.

2. Examples of situations or problems that are referred to Deputy Treasurer or Chief Financial Officer / Treasurer for direction or resolution.

- Funding challenges or prioritization of funding for high-priority projects that exceed available resources or conflict with corporate strategic plans, the analyst refers the issue for prioritization and resolution.
- If an internal financial policy (e.g., funding reserves, capital carryforwards) is unclear or does not cover a unique situation, the analyst escalates the matter for interpretation or policy amendment and/or development.
- Major proposed changes to processes or system structure (e.g., chart of accounts redesign, budget process).



Required Training

- Questica, Power BI, and Great Plains training on functionality and reporting.
- SharePoint for records management.
- Public sector accounting standards training on new standard requirements as needed.
- Changes and updates to excise tax (i.e. HST) legislation.
- Other training, workshops and seminars as appropriate and required.



Minimum Qualifications

Education (degree/diploma/certifications)

- University degree in Business Administration, Accounting or Finance.
- Chartered Professional Accountant (CPA) Designation and member in good standing is an asset.

Experience

- Minimum of three years of relevant financial reporting and budgeting experience, preferably in a Municipal government.

Knowledge/Skills/Ability

- Possess thorough knowledge of accounting principles, budgeting and reporting.
- Excellent analytical skills with the ability to interpret financial information and model implications.
- Strong attention to detail to ensure accurate and reliable information.
- Excellent interpersonal, verbal and written communication skills, together with strong organizational, time management and multitasking.
- Advanced proficiency in Microsoft Excel, including financial modelling, complex formulas, data analysis and reconciliation, together with strong proficiency in PowerPoint for executive and Council presentations. Experience with Power BI, budgeting and forecasting systems, and financial accounting/ERP software would be considered an asset.

Physical Demands

- Work is conducted in a standard office environment with periods of sitting, standing or walking.
- The role requires high attention to detail, continual visual concentration and multitasking across multiple priorities and hard deadlines

Position Requirements

- Possess a valid class 'G' Ontario's driver's license with an acceptable driver's abstract and access to a reliable vehicle.
- A current and acceptable Criminal Record Check is required prior to the commencement date.
- Attendance at meetings, seminars and conferences as required. Attendance at meetings after hours may be required.
- Must have a high-speed internet connection and a proper workstation at a home location to enable remote work. Please refer to the Working From Home procedure.



City of Orillia | Corporate Services Department

Senior Financial Planning Analyst



Position Classification

Position Title: Senior Financial Planning Analyst	Division: Financial Services
Department: Corporate Services	Classification: Exempt (non-union)
Work Location: Orillia City Centre	Reports to (Direct): Deputy Treasurer
Position(s) Supervised Directly: None	Position(s) Supervised Indirectly: Finance Co-op Student
Effective Date:	Revision Date: June 1, 2025
Salary Range: Category 6 - Exempt Salary Schedule	Hours per Week: 35



Organizational Chart

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

Indirect Report:

Chief Financial Officer / Treasurer



Immediate Supervisor:

Deputy Treasurer



Position:

Senior Financial Planning Analyst



Direct Reports:

None