



Finance Officer Development Program Boot Camp #6

University of Victoria

August 14-18, 2011



This comprehensive course starts at 4:00 pm on Sunday and runs through to 4:00 pm on Thursday. The combination of lectures, exercises, group work and social events are designed to have you “hit the ground running” on Friday morning.

CAMP OBJECTIVES:

The camp will provide participants with a comprehensive overview of municipal finance issues with a focus on providing “real-life”, practical information that can immediately be applied in a municipal setting.

This is the sixth time this training program is being offered in response to demand for a local government finance course that goes beyond the basics, telling participants what really matters and providing key “how to” and best practice information. Participants will be asked for significant feedback that will help shape the content and format of future sessions.

WHO SHOULD ATTEND:

This camp is designed for finance people who are new to municipal government, people working in local government finance departments who want to move to the level of chief financial officer, and people in the municipal CFO role who want a better grounding in the requirements and responsibilities of the position. While originally designed for municipalities, Regional District staff are being accommodated by having one day set aside for them while municipal staff are attending the Tax & Assessment Day.

BENEFITS OF ATTENDING:

On completion of the camp participants will have a solid grounding on key financial topics like budgeting, property taxation, public sector accounting requirements (“PSAB”), and the legislative constraints and powers relevant to the finance area that a municipality operates in. Additionally, participants will be familiarized with the significant resources available to support them in performing their job and have the opportunity to discuss a broad range of municipal finance issues with a number of working, seasoned, finance professionals.

Participants can expect to discuss and answer questions like the following:

- How to lead a successful budget process that promotes realization of strategic goals, is understandable, efficient, and is ultimately supported by council, staff and the public?
- What are the current issues on municipal taxation and exactly how are municipal tax rates calculated in practice?
- What constraints and powers does a municipality have in respect to raising revenues and how can reserves and surplus be used?
- What reports are required by statute and how do I make them meaningful to managers, council and the citizens?
- What is a legal municipal expenditure and what are the constraints on incurring municipal liabilities?

CONTENT/PRESENTATION OUTLINE:

The educational session will offer presentations and facilitated discussions along with team work on the following:

- The role and responsibility of the Finance Officer, including ethics and issues of personal liability.
- Familiarization with various municipal financial resources and organizations.
- Municipal budgeting and departmental business planning.
- Municipal expenditure and liability framework, municipal revenue sources, investments and debt, fees and charges, reserves and surplus.
- Property taxation and assessment including tax calculation, tax collection and collecting for other governments.
- Municipal accounting and financial reporting including PSAB, ministry reporting and audit requirements.
- A separate Regional District Finance Day as an option to the Property Tax & Assessment sessions

ABOUT THE WORKSHOP LEADERS:

All sessions will be led by working, seasoned, local government finance professionals. Some of the presenters include: Doug Stein, Bill Cox, Shelley Hahn, Todd Pugh, Suzanne Fillion, Valla Tinney and Mindy Smith.

Workshop Locations/Dates

August 14th 4:00 pm to August 18th 4:00 pm, 2011
University of Victoria

Registration Fees

Cost is **\$1,800 + GST**. Registration fee includes four days accommodation, all meals and refreshments as well as workshop materials. Some places will be reserved for people currently working for smaller municipalities, who need immediate training.

Participants are required to stay at the University of Victoria accommodations in order to gain the full benefits of the program.