

Job Title: Branch Assistant –Financial Services		Pay Grade: 4
Department: Financial Services		Reports To: Chief Financial Officer
JJE Maintenance Review Date: 2028	Content Last Updated: October 2024	Position(s) supervised: N/A

JOB SUMMARY

The Branch Assistant is responsible for providing administrative assistance and support to the Chief Financial Officer (CFO) and Financial Services branch leadership which includes, financial planning and operations, procurement, insurance and risk management and asset management.

MAJOR DUTIES AND RESPONSIBILITIES

1. Provides administrative support to all managers and staff in performing weekly, monthly and annual administrative functions.
2. Responds to enquiries of a general nature over the phone or in person and refers more complex or unusual enquiries to appropriate staff for response; prepares correspondence in response to routine written enquiries.
3. Requests agenda items and prepares staff meeting agendas including supporting documentation; takes and transcribes minutes of the meetings including recording of tasks and decisions made, as required; arranges and provides for meeting logistics including room bookings, participant invitations and catering.
4. SharePoint administrator for non-confidential sites including liaison with Information Services in the creation of team sites. Assists with the preparation of content.
5. Schedules appointments; meetings including providing links to material, hosting and technical support for online/webinars; travel and other time commitments.
6. Receives, codes, assigns and distributes incoming mail, faxes and courier packages for the branch.
7. Undertakes word processing assignments such as correspondence, non-technical reports, briefing notes and contracts, including spreadsheets, charts, PowerPoints, and graphs and assists with preparation of staff reports and other documentation for review and signature of departmental staff, ensuring compliance with corporate standards.

8. As directed, composes correspondence and drafts staff reports for review and signature of branch staff. Assists the CFO with the coordination and completion of branch specific staff reports and reports requiring finance review, working to ensure timelines are met.
9. Conducts research on various subjects by retrieving file and internet information, contacts/surveys other agencies and organizations, and prepares correspondence, briefing notes or reports as required.
10. Performs various administrative duties related to the processing and maintenance of requests for proposal, contracts and agreements and Freedom of Information requests.
11. Researches, prepares and processes forms, reports, notices, media releases, correspondence, advertisements and other documents and materials relating to branch programs and processes and ensures compliance with corporate standards.
12. Liaises with internal staff and external contacts, requests service and coordinates administrative details.
13. Maintains management reports and project tracking systems; supports staff to ensure deadlines are met.
14. Maintains various files, databases and spreadsheets, updates relevant resource materials for the branch, and archives files on a pre-scheduled basis.
15. Coding and filing documents in the corporate records retention and classification system including those associated with grants to community organizations, procurement contracts and required external reports (audit plans, year-end statements and grant reporting).
16. Performs a variety of clerical duties including faxing documents, photocopying materials, filing, maintaining and updating phone, address and other such lists, and ordering office supplies.
17. As directed, provides information to a wide variety of internal and external contacts and relates appropriately with community leaders including elected officials, external officials and representatives of outside organizations.
18. Updates and publishes content as needed to both the intranet and CVRD external website.
19. Assist the Chief Financial Officer in maintaining the business continuity plans and policy/ procedures related to responsibilities under Emergency Management.
20. Provides back-up administrative support to other branches as needed.
21. Assistance with on /off boarding of employees.
22. Undertakes other assigned duties as required.

REQUIRED EDUCATION AND EXPERIENCE

- Grade 12 or equivalent

- Completion of a six-month to one year office administration course at a community college.
- Over one year and up to and including two years of directly related experience in providing administrative support for a department, preferably in local government.
- Equivalent combination of education and experience may be considered.

REQUIRED LICENCES, CERTIFICATES AND REGISTRATIONS *(required for acceptance into the job or to be acquired in first six months of being in the job)*

- N/A

PREFERRED QUALIFICATIONS

- Additional education in local government

KNOWLEDGE, ABILITIES AND SKILLS *(required for acceptance into the job or to be demonstrated in first six months of being in the job)*

- Knowledge of the practices and processes involved in local government office administration
- Knowledge of the mandate, policies and programs in order to deal with routine enquiries and provide effective administrative support
- Knowledge of office equipment
- Knowledge of safety procedures and safe workplace practices related to the work
- Ability to draft agendas, record minutes of meetings accurately and efficiently
- Ability to research various matters, prepare correspondence and reports, and coordinate administrative details of a branch program or process
- Ability to utilize proper grammar, punctuation and spelling
- Ability to anticipate and balance multiple demands and priorities *and* meet deadlines
- Ability to communicate effectively both orally and in writing
- Ability to relate appropriately with board and committee members, external officials and representatives, the public and other staff
- Ability to advise staff on proper protocols through demonstrated leadership and interpersonal skills.
- Strong customer service and conflict resolution skills
- Strong typing, word processing, spreadsheet and database skills
- Good communication, interpersonal, organizational, time management, analytical, problem solving and expediting skills
- Demonstrated advanced level skills with Microsoft Office Suite, with emphasis on presentations and word processing. Strong utilization skills with Adobe Acrobat, web utilization skills, and SharePoint applications.

- Demonstrated ability in information retrieval from financial software applications (ie. LandUse, iCity) and use of web-based applications for file and document sharing.
- Basic understanding of financial applications.

EMPLOYEE SIGNATURE

I have read and understand this job description

Print Name

Signature

Date