



# Rising to the challenge



## 2023 Financial Management and Leadership Development Program

### Program details and application process

Applications open 1 March 2023

Applications close 3 April 2023

PLEASE NOTE THAT THERE CAN ONLY BE ONE APPLICATION MADE PER COUNCIL.



# The 2023 FinPro Leadership Journey.

The FinPro Financial Management and Leadership Program provides a unique opportunity to develop the extra skills needed to move from being an 'accountant' to being a 'leader', or 'deepening already acquired skills.

This program has been developed after considering the specialist skills and knowledge councils require of finance managers and CFO's in today's world. It will be delivered by people who work within the sector and who have a broad range of skills, knowledge, and experience.

Participants of the program will work with industry leaders to gain knowledge as well as practical experience, both by attending this three-day residential workshop, monthly webinars for a period of 12 months to May 2024, and by participating in the FinPro Mentoring Program.

## Objectives of the Program.

The objectives of the program are to:

- Enhance individual leadership and management capabilities.
- Develop financial management skills within the legislative and reporting requirements of the sector.
- Provide an opportunity for participants to forge new relationships with others from different councils within VIC Local Government.
- Provide participants with support to develop the specific skills required to be a leader in financial management within the local government sector; and
- Provide an opportunity to 'excite' participants as to what finance professionals working in Local Government can achieve.

## Eligibility Requirements

FinPro encourages all members to develop their careers, and as such, is offering up to 12 places per year for members to take part in this Leadership Program.

To be eligible to apply you must:

1. Be a fully paid up FinPro Member who aspires to a Leadership role within the sector.
2. Be available to attend the full residential program onsite at CountryPlace Kalorama from 5pm Sunday 7 May 2023 through to Wednesday 10 May 2023 at 1pm.
3. Have the approval of your employer to attend the full residential program should they be successful in their application, prior to submitting your application.
4. Complete the Application form (available from Wednesday 1 March 2023) online at [www.finpro.org.au/news/](http://www.finpro.org.au/news/)

**PLEASE NOTE THAT ONLY THERE CAN ONLY BE ONE APPLICATION MADE PER COUNCIL.**

**PREVIOUS APPLICANTS FOR THE PROGRAM ARE HIGHLY ENCOURAGED TO APPLY AGAIN FOR THE PROGRAM.**

# General Information for the Residential Workshop

Dates: Sunday 7 May at 5:00pm through to Wednesday 10 May 2023 at 1:00pm.  
Participants are required to be present for the duration of the workshop.

Dress Code: Casual

Venue: Country Place Kalorama, 180 Olinda Creek Road, Kalorama.

Included: All meals, drinks and accommodation are provided as part of the Workshop.  
Accommodation comprises ensuite rooms with view of the gardens.

## Workshop materials

All participants will be required to bring their own laptop, USB and copies (hard or soft copies) of the following:

- Their Council's most recent Annual Report
- Budget
- Council Plan
- Long-Term Financial Plan
- Copy of their Council's Quarterly Finance Report.



# Program

## Sunday 7 May 2023

5:00pm: Check-in at Country Place Kalorama

6:15pm – 10:00pm: Welcome and casual dinner where participants get to know each other and 'break the ice'. The workshop Facilitator, Belinda Johnson will be in attendance and greet participants on arrival.

**Belinda Johnson, FinPro Executive Member and Manager Finance, Southern Grampians Shire, will facilitate the entire workshop.**

## Monday 8 May 2023

*Today's sessions will be about better understanding the Financial Management Skills required by today's successful Finance Leader.*

### 9:00am – 9:50am Introduction to Workshop

Belinda Johnson will provide an overview of the Workshop and Leadership Program.

Each participant will be given the opportunity to introduce themselves to the group:

- Who they are
- Where they work
- Their current role
- Short and long term career aspirations
- Goals they hope to get from the Program. Each person to include a couple of short-term goals they hope to achieve over the period of this workshop

### 9:50am - 10:00am Morning tea

### 10:00am - 12:00pm Introduction and Context - Local Government Finance

Marc Giglio, Director Corporate Services at Banyule City Council, will commence the workshop by providing an overview of the framework and context of Local Government Financial Management. He will discuss the important role of a Finance Professionals in a Council.

#### **Marc will cover off on the following skill-sets:**

- Local Government Regulatory Framework
- Federal, State and Local Political Environment
- Dealing with Audits (internal and external) and Audit Committees
- Corporate Information Systems – much more than just accounting systems
- Managing the above within a risk framework

**12:00pm – 12:30pm Lunch**

**12:30pm – 1:00pm Fresh air break and email / phone catch-up time**

**1:00pm – 3:00pm Financial Reporting and analysis**

Kim Jaensch – Director Corporate Services at City of Frankston, and Mick Jaensch, former Director Corporate Services at the City of Greater Dandenong (and both former FinPro Executive members) will provide practical advice regarding the financial analysis and presentation of financial information.

**Kim and Mick will cover off on the following skill-sets:**

- Financial Planning, budgeting, forecasting
- Analytical data analysis
- Report writing on difficult issues in simple terms
- Local Government accounting from a practical view and emerging issues
- The role of key performance indicators and the current KPI framework in Local Government

**3:00pm – 3:15pm Afternoon tea**

**3:15pm – 5:00pm Rates, Revenue and Valuations Management**

Danny Wain, Chief Financial Officer at Monash City Council and FinPro Executive Member will work with the group to explore the various challenging issues around rates, revenue and valuations management in Local Government.

Danny will cover off on the following skill-sets:

- Understanding Rating Systems
- Understanding other revenue streams
- The importance of the Rating and Revenue Strategy/Plan to Long Term Financial Planning
- The impacts of the Local Government Amendment (Rating and other Matters) Act 2022

**5:00pm – 6:30pm Free time**

**6:30pm – 10:00pm Dinner onsite at Country Place Kalorama**



# Tuesday 9 May 2023

*Today's sessions will be about better understanding the Leadership skills required in 2023 and beyond, and learning to adapt and evolve in an ever-changing work environment.*

Julz Parkin, Hello People will facilitate today's sessions.

Julz' detailed program will include the use of the DISC Advanced Leadership Profile

## **9:00am – 10:30am Understanding Self (using DISC)**

- Understanding the DISC Framework + our profiles
- How our behaviours affect our leadership
- Understanding our natural strengths

## **10:30am – 10:45am Morning Tea**

## **10:45am – 12:30pm Communicating with Confidence**

- The importance of Emotional Intelligence as a leader
- Communicating with different personalities in your team
- Honest conversations
- Managing conflict and performance issues

## **12:30pm – 1:30pm Lunch / Email break**

## **1:30pm – 3:00pm Teamwork + Building Trust**

- Group exercise
- Giving and receiving feedback
- Building trust as a leader

## **3:00pm – 3:15pm Afternoon Tea**

## **3:15pm – 5:00pm The 3 C's of Leadership**

How to use communication, clarity and consistency to effectively motivate and lead your team.  
The importance of building a strong culture.

### **Julz will cover off on the following skill-sets:**

- Proven leadership qualities, enabling the leader to further develop and maintain a team of motivated.
- Employees and build high performing culture.
- Ability to work as a member of multi-disciplinary teams to meet organisational requirements. Leadership
- Ability to direct and facilitate the coordination of projects and services to achieve successful outcomes
- Coaching, guiding and mentoring skills to support employee development and performance Advanced
- political acumen with an ability to work outside of scope to deliver options to solve complex matters
- Ability to generate co-operation and trust across all areas of the organisation.
- Ability to resolve conflict and negotiate mutually agreeable outcomes.

**5:00pm – 6:30pm Free time**

**6:30pm – 10:00pm Dinner onsite at Country Place Kalorama**

## **Wednesday 10 May 2023**

***Today we take time to reflect on our learnings of the past few days, bringing it all together for a successful career.***

**9:00am – 9:30am Initial reflections**

At the beginning of this workshop, participants jotted down some of their short-term goals they hoped to achieve during the workshop. Now is the opportunity to reflect on these and determine how each participant went.

**9:30am – 11:00am Reflections and learnings of a current Local Government Leader**

Bradley Thomas, CEO Hepburn Shire Council and FinPro President will share his career journey so far. He will also share insights into dealing with elected representatives and on what makes a successful leader today and into the future.

**11:00am – 11:30am Morning tea**

**11:30am – 12:45pm Workshop Conclusion**

Belinda Johnson will bring the workshop to its conclusion, discussing with participants both short and long term goals. She will also introduce the opportunity for each participant to reflect on their journey so far and to put in writing their goals for the next 6 and 12 months and for the next 5 years.

**12:45pm Participants leave at lunchtime**

A take-away lunch will be provided to make the trip home a little more comfortable.



# Speaker Profiles



## Belinda Johnson

Belinda is the Manager Finance at Southern Grampians Shire Council where her career has spanned over 35 years. Whilst most of her career has been focused in the corporate service areas, she also has substantial experience in all aspects of local government services.

She has a keen interest in ensuring finance staff continue to adapt and develop new skills to support their ever-changing organisations and has a keen interest in knowledge and resource sharing throughout the sector.

## Marc Giglio

Marc has been the Director Corporate Services at Banyule City Council since January 2016. His portfolio includes Finance and Procurement, People & Culture, Communications and Governance, Customer Experience, Digital Transformation Corporate Planning and Business Improvement.

Marc has more than 20 years' experience in Local Government following a short stint in the banking sector. His experience includes senior finance roles at Monash City Council, Yarra City Council and Whitehorse City Council. He has extensive experience in financial management, treasury, budgeting, long-term financial planning, financial reporting and Corporate planning.

Marc is an FCPA with CPA Australia and was an executive member on FinPro where he held a Committee position for over 10 years.



## Kim Jaensch

Kim is the Director Corporate and Commercial Services at Frankston City Council and has had 25 years' experience in Local Government including Monash City Council and Knox City Council. As a CPA and experienced leader, she has played a pivotal role in ensuring Council's long-term economic sustainability and strong financial position.

Kim holds an MBA and has also undertaken the Australian Institute of Company Directors course. Kim is also a Non-Executive Board member on Peninsula Leisure P/L since 2020 and was a past executive member on FinPro.



# Speaker Profiles



## Julz Parkin

Julia (Julz) Parkin is a leadership and career coach, focussed on helping subject experts become confident, authentic people leaders.

Prior to starting her own business, Julz has 15 years of experience in People & Culture (HR) roles, with several years experience as an HR Advisor/Manager in Local Government. With this knowledge, Julz understands that leading people is often the hardest part of your role, and the part taking up a lot of your energy.

In her leadership programs and workshops, Julz has a strong focus on:

- The importance of understanding yourself as a leader; your strengths and challenge areas.
- Understanding the different styles in your team, and how to adapt to each style.
- Building trust within your team through clear, honest communication.
- Moving from technical expert to confident people leader.

The workshop is underpinned by DISC Advanced Psychometrics, and will use your individual DISC Leadership Assessment to guide discussions throughout the day.



## Danny Wain

Danny is the Chief Financial Officer (CFO) at Monash City Council and is an Executive member and Past President of FinPro. In his various Local Government roles, he has played an integral part in presenting responsible fiscal management and has prepared many budgets based on sound long-term financial policy.

His experience in the rating space includes:

- managing the change from Site Value to Capital Improved Value at Monash; and
- implementing Differential Rating in Monash in 2015

Monash Council was the last Council in Victoria that rated on Site Value and switched to Capital Improved Value (CIV) in 2010. In 2012 Council introduced a differential rate on gambling machine venues that lead to the State Government banning gaming machine differentials and the introduction of the Differential Guidelines.

In 2018 Monash lead the first successful Metro council application for a rate cap variation related to increased recycling costs (and the first council to knock back the allowed increase).



# Speaker Profiles

## Mick Jaensch

Mick is a highly experienced local government executive having recently completed a long career spanning 37 years in the sector with the final 27 of them as Director Corporate Services across Campaspe, Surf- Coast, Knox and Greater Dandenong Councils. With a finance background and a qualified CPA, holds an MBA and has completed the Australian Institute of Company Directors course.

Since his retirement from his full time Council role and commencing his consulting business, Mick has been appointed to the Audit and Risk Committees of Bayside City Council and the Shire of West Wimmera and recently assisted the Shire of Campaspe and Whittlesea City Council with various tasks.

Mick is also a Non-Executive Director of South East Leisure P/L, a company formed by the City of Greater Dandenong to manage its four major leisure facilities and is a past Executive Member on FinPro.



## Bradley Thomas

Bradley has had a long and distinguished career in both the public and private sectors, spanning two decades across multiple states.

He started his career at KPMG in 2003, in Sydney's West. As a Graduate Accountant, Bradley worked on financial reviews and audits for a number of high profile clients.

After completing his CA requirements, he made the move South, starting at the City of Greater Bendigo in 2008. After six years in various financial roles, Bradley made the move to Mount Alexander Shire Council where he held a number of senior level roles, including Acting Director Corporate Services and Executive Manager Business Performance.

For the past three and a half years Bradley has called Hepburn Shire Council home, commencing in the diverse role of Director Community and Corporate before being appointed as Chief Executive Officer in May 2021, having previously been acting in that role since the start of 2021.

Bradley holds a Bachelor of Commerce (Accounting) from La Trobe University and has a Graduate Diploma of Chartered Accounting. He also completed an MBA in 2018, and undertook the LGPro Emerging Leaders Program in 2017.

Bradley has been a member of the FinPro Executive Committee since 2016, and the President since 2019.



# Local Government Finance Professionals:

For all enquiries, please contact

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