



Rising to the challenge

Financial Management and Leadership Development Program 2021

Welcome onboard the FinPro Leadership Journey.

Over the coming 12 months participants in the 2021 FinPro Financial Management and Leadership Program will experience a unique opportunity to develop the extra skills needed to move from being an 'accountant' to being a 'leader' in Local Government.

This program has been developed by considering the specialist skills and knowledge councils require of finance managers 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 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 September 2022 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.





General Information for the three-day Workshop

Dates: Sunday 14 November 2021 at 5:00pm – Wednesday 17 November at 12:45pm

Dress Code: Casual

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

Dates: Sunday 14 November 2021 at 5:00pm through to Wednesday 17 November 2021 at 1:00pm. Check-in is available at 5:00pm on Sunday 14 November 2021

What's included: All meals, drinks and accommodation are provided as part of the Workshop. Accommodation comprises ensuite rooms with view of the gardens. Wireless internet access is available from most rooms.

Workshop materials

All participants 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.

Sunday 14 November 2021

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, taking participants on a journey of learning, sharing and development.

Monday 15 November 2021

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 served in the room

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 that the finance professionals have 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

5:00pm – 6:30pm Free time

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



Tuesday 16 November 2021

Today's sessions will be about better understanding the Leadership skills required by a Finance Manager in 2021 and learning to adapt and evolve in an ever-changing work environment.

Margaret Devlin, Managing Director of the Centre for Organisation Development will deliver the whole day program and will cover the areas of authentic leadership, team leadership or other areas of focus based on research to support participants to focus their development to balance both technical/operational competence and people leadership as they progress in their careers.

Her detailed program will include the use of the MBTI® instrument and will be broken down as follows:

9:00am – 10:30am Overview of the workshop and introductions.

Authentic Leadership

- Leadership vs management
- Leadership styles
- Qualities of leadership

Leading in complexity (the next normal)

- Taking a systems approach to management and leadership

10:30am – 10:45am Morning Tea

10:45am – 12:30pm The importance of self-awareness – (MBTI)

- Identifying as a professional manager
- Leveraging diversity and strengths
- The importance of feedback and tailored communication.
- Being open to adapt and evolve to the ever-changing work environment

12:30pm – 1:00pm Lunch

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

1:30pm – 3:00pm Team Leadership

Team Leadership – inspiring others to perform, cooperate and collaborate

- Articulating a clear purpose (Why)
- Distinguishing task output and outcome
- Influencing thinking – rather than controlling results
- Communicating expectations and clarifying roles and responsibilities

3:00pm – 3:15pm Afternoon Tea

3:15pm – 5:00pm

- Managing challenging people
- Developing political acuity
- Reflective practice and ongoing learning.

Margaret will cover off on the following skill-sets:

- Proven leadership qualities, enabling the appointee 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
- Strength in negotiation, with an ability to influence others across a broad range of interests to gain cooperation and collaboration to deliver on Council's strategic direction and plans
- 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

Representatives from Vision Super, FinPro's Program Partners for the Financial Management and Leadership Development Program will also attend the dinner.

Wednesday 17 November 2021

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 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 commenced her career in Local Government in 1997 and joined Frankston City Council in 2010 as Manager Financial Services. As a Certified Practising Accountant and experienced leader, she has played a pivotal role in ensuring Council's long-term economic sustainability and strong financial position.

Kim holds a Master of Business Administration and has also undertaken the Australian Institute of Company Directors course. In April 2020, she was appointed to the position of Chief Financial Officer, forming part of Council's Executive.

Speaker Profiles



Margaret Devlin

Margaret Devlin is a highly qualified professional facilitator, consultant and executive coach with over 30 years' experience. Her formal qualifications include a Bachelor of Arts, Diploma of Education and a Post Graduate Diploma in Organisation Behaviour. In addition, she is an accredited administrator of the Myers Briggs Type Indicator® (MBTI), Hermann Brain Dominance Instrument (HBDI®), Spiral Dynamics Integral®, Values in Action (VIAMe®), and a Master Practitioner of Neuro Linguistic Programming (NLP).

Margaret is Managing Director of the Centre for Organisation Development. Her broad experience including being Mayor of a large metropolitan Council, and currently as an Executive Coach and Mentor to University and Government Executives, Local Government Mayors, Councillors and Executives gives her a unique perspective of issues facing leaders and managers in their interface with staff, stakeholders and the community.

Margaret is known for her positive approach and her sharp analytical mind. Her work is an extension of her passion to take care of the human side of enterprise – to create sustainable workplaces, where both business and people outcomes can be achieved.



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
- 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).

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. Monash Council is debt free and has the lowest rates of any Council in Victoria, a moniker it may well have in perpetuity under the rate capping regime in Victoria.

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, Mick has been regarded as an industry leader in strategic financial planning within local government. In addition to this qualification, Mick further 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 is assisting Kingston with some long-term financial planning guidance.



Debbie Marks

Debbie has a background in commerce with many years' experience in IT and Business Project Management. Working for large multi-national organisations and governments in both Australia and the UK she excels at delivering and embedding change. Now a qualified coach, trainer and partnership broker, Debbie is an expert at benefits-focused facilitation. With eight years' experience improving outcomes for a spectrum of clients from unemployed, through middle managers, to senior executives her audience engagement and feedback is first-rate. She brings an open, energetic and authentic approach that empowers teams and delivers



Bradley Thomas

Bradley joined Council in January 2019, having previously held the position of Executive Manager Business Performance with the Mount Alexander Shire Council. Bradley has extensive knowledge of local government finance, information technology and corporate reporting. Bradley is a qualified Chartered Accountant, holds an MBA and is passionate about ensuring a high functioning organisation that delivers quality services to the community.

Bradley holds qualifications in Bachelor of Commerce and a Master of Business Administration. He is also a Chartered Accountant.

Local Government Finance Professionals:

For all enquiries, please contact

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