

FINANCIAL PLANNING MANAGER

SANTA MARGARITA WATER DISTRICT | RANCHO SANTA MARGARITA, CA

ANNUAL SALARY: \$142,298.78-\$196,160.12 DOE/DOQ*

**An additional 3% COLA is anticipated for July, pending Board approval*

CAREER OPPORTUNITY



THE SANTA MARGARITA WATER DISTRICT (SMWD) is seeking a strategic and proactive Financial Planning Manager to play a central role in aligning financial planning with the District's long-range infrastructure and water resource priorities. As one of the region's most complex and innovative water agencies, SMWD is committed to fiscally sustainable growth as it advances an exciting capital program, and this role is instrumental in ensuring those initiatives are financially sound and well-positioned for the future. Working in close collaboration with the Director of Planning and Water Resources, executive leadership, departments, and external consultants, the Financial Planning Manager integrates financial forecasting, modeling, and data-driven analysis into capital planning, asset management, operational decision-making, and budget development. The ideal candidate brings initiative, strong analytical capability, and the flexibility to manage multiple priorities with ease, translating complex financial information into clear insights that support executive leadership and the Board of Directors in guiding the District's continued growth and resilience. *Drive sound financial decision-making for a regional leader in sustainable water resource management; apply today!*



THE COMMUNITY

NESTLED IN THE CANYONS OF SOUTH ORANGE COUNTY and not far from the bustle of the Los Angeles metro area, Santa Margarita Water District is headquartered in beautiful Rancho Santa Margarita. The District serves ten distinctive communities, including the cities of Mission Viejo, Rancho Santa Margarita, and San Juan Capistrano, as well as the unincorporated communities of Coto de Caza, Las Flores, Ladera Ranch, Talega in San Clemente, and the Rancho Mission Viejo villages of Sendero, Esencia, and Rienda. With year-round temperate weather, proximity to ocean beaches, and set against breathtaking canyons, these communities offer a slower pace than the northern end of the County, while still providing easy access to all the amenities of the second-largest metro area in the US.

Residents enjoy access to parks, trails, and nearby natural areas that support an active, outdoor-oriented lifestyle year-round, along with highly regarded educational institutions and an engaged community culture. From the meandering streets, period architecture, and quaint historic downtown of San Juan Capistrano; to family-friendly Mission Viejo, with its excellent schools and beautiful recreational lake; and Rancho Mission Viejo's meticulously master-planned communities, incorporating thoughtful touches from wellness centers to summer camps, the District's service area reflects a diverse mix of historic neighborhoods and modern amenities. These communities are also characterized by responsible growth and a strong emphasis on environmental stewardship and long-term sustainability—values that align closely with SMWD's mission.

SMWD BY THE NUMBERS



1 Groundwater Treatment Plant



233 FACILITIES



1,700 MILES of Pipeline



Industry First Advanced Recycled Water Treatment Plant



2 ADVANCED WASTEWATER TREATMENT PLANTS



9,500 Acre-Feet of Recycled Water Reservoirs



Click here for more details about SMWD's complex infrastructure

THE ORGANIZATION

THE SANTA MARGARITA WATER DISTRICT (SMWD) is a fiscally healthy and sustainability-focused retail water district located in southern Orange County, California, providing high-quality drinking water, recycled water, and wastewater services to 200,000+ residents across a 111 square mile service area. Governed by a five-member elected Board of Directors and with an annual budget of approximately \$170 million, the District is at a pivotal moment as it works to build and align a new organizational structure focused on innovation, collaborative leadership, and long-term sustainability. With a mid-sized workforce of over 200 employees, the District has added a number of strategic new positions for this fiscal year, with the goal of centering operational agility and targeted growth to meet current demand and future needs. Leveraging meaningful regional, state, and federal impact in water policy and resource management, SMWD is recognized for its award-winning conservation efforts and campaigns, and places a strong emphasis on leadership development through a well-received internal leadership training program. As the District continues to grow as a cohesive, high-performing organization, it seeks team-oriented leaders who value accountability, collaboration, and service excellence in advancing SMWD's mission and public trust.

LEARN MORE ABOUT THE DISTRICT



CLICK BUTTON

THE FINANCE DEPARTMENT

THE FINANCE DEPARTMENT PROVIDES ESSENTIAL FINANCIAL STEWARDSHIP for the District, managing accounting, auditing, budgeting, investment, and debt activities to ensure fiscal accountability and transparency. SMWD is in a strong financial position, with robust operating and capital budgets, healthy reserves, and a track record of excellence in financial reporting. Through careful fiscal management, strategic forecasting, and comprehensive financial reporting, the Finance Department supports informed decision-making and helps maintain SMWD's strong financial foundation.

[READ MORE](#)



THE JOB

REPORTING TO THE DIRECTOR OF FINANCE AND OVERSEEING A STAFF of two Financial Analysts, the Financial Planning Manager leads long-term financial forecasting, District-wide budget development, and rate-setting processes, comfortably managing multiple priorities and remaining flexible to business needs. They play a key role in strategic planning for the District, evaluating project feasibility, assessing funding strategies, and proactively anticipating fiscal impacts—requiring a deep understanding of the District's capital planning priorities and goals. The position also plays a key role in the District's budget development process, partnering with departments to translate operational and capital priorities into fiscally responsible spending plans, and frequently lead matrixed teams of data analysts in Operations and Water Resources to integrate financial insight with system performance and long-range planning data. While this role is hands-on and requires technical expertise in financial modeling and data analytics, its purpose is to provide big-picture insight that ensures SMWD remains fiscally healthy, resilient, and well-positioned for long-term growth.

THE IDEAL CANDIDATE

THE IDEAL CANDIDATE IS AN AGILE AND DYNAMIC FINANCE LEADER who brings a balance of strong technical skills in data analytics and financial modeling, including hands-on development of long-term financial plans, rate and revenue models, and multi-year financial forecasts, and the strategic wide-angle lens necessary to advise executive leadership and anticipate organizational needs. They are motivated by finding fiscally sustainable paths to achieving capital goals while supporting reliable public service delivery and long-term infrastructure investment. This will be someone who needs minimal direction, enjoys frequent communication with stakeholders, and endeavors to always be one step ahead—proactively identifying financial risks and opportunities and providing clear, data-driven recommendations that guide long-term financial strategy. A credible and confident presenter, the successful candidate engages comfortably with executive leadership and the Board of Directors, translating complex analysis into actionable strategy and communicating the financial implications of capital programs, rate adjustments, and long-term funding strategies. A strong understanding of capital asset financing, investment and debt financing strategies, and public sector budget processes will be key to success in this role, including demonstrated experience developing or managing public sector operating and capital budgets, building utility rate models, preparing long-term financial forecasts, and supporting or leading the issuance of municipal or public agency debt. Prior experience within water, wastewater, other utility finance, or the bond market is valued, particularly experience working with municipal advisors, rating agencies, underwriters, and bond counsel in the capital markets.

Santa Margarita Water District is building an intentional culture of collaboration, innovation, and forward momentum. Leaders who combine vision with execution will thrive in this environment, and those with the genuine desire to work together, communicate, and build consensus will find a like-minded team, and the opportunity to shape the future of water resource management in this dynamic region.



Core Competencies of the Ideal Candidate will include:

Strategic Thinking: Anticipates long-term organizational needs, aligns operational goals with larger priorities, and creatively approaches problem-solving.

Team Orientation: Approaches challenges and day-to-day tasks as an opportunity to collaborate with talented colleagues and staff.

Communication: Listens actively and seeks to understand; maintains an intentionally high-volume, real-time communication flow with executive leadership team to ensure shared context and strategic alignment.

Relationship-Building: Builds trust and credibility with executive leadership, the Board of Directors, staff, and external partners.

Vision: Employs big-picture thinking, works collaboratively with the executive leadership team to take cutting-edge ideas to execution, and communicates organizational vision compellingly to staff to build alignment and buy-in.

Talent Development: Prioritizes mentorship and knowledge-sharing to empower staff and foster growth; actively promotes leadership development and succession planning.

Change Agility: Remains adaptable to evolving organizational needs, builds change-resilient teams, and cultivates a solutions-focused mindset.

Innovation: Acts as a driving force advancing service excellence, forward-thinking projects, and thoughtful organizational change; creates space for new ideas, risk-taking, and out-of-the-box thinking.

Mission Focus: Believes in and models SMWD's mission, vision, and values including service excellence, environmental sustainability and resource stewardship, fiscal responsibility and transparency, and strengthening communities through interagency and regional relationships; creates an inclusive environment where employees feel supported and connected to the District's mission.



Employment Standards

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Education: Equivalent to a Bachelor's degree (Master's degree desirable) from an accredited college or university in finance, accounting, business or public administration or a closely related field.

Experience: Six (6) years of increasingly responsible analytical experience financial management, including two years of supervisory experience. While some experience with a public utility or government agency is desired, a private sector mindset is welcome.

SALARY & BENEFITS

This position will receive an annual salary of **\$142,298.78-\$196,160.12 DOE/DOQ**, with an additional 3% COLA anticipated for July, pending Board approval.

PLUS an attractive benefits package that includes:

CalPERS Retirement: The Classic members' formula is 2.7% at 55 with an employee contribution of 8%, while Public Employees' Pension Reform Act (PEPRA) members have a formula of 2% at 62 with an employee contribution of 7.5%.

Medical: Multiple plans, including PPO and HMO options, are available. The District pays 100% of the cost for the employee's coverage (not to exceed the amount of the highest HMO plan); the District will additionally contribute 50% of the premium cost for dependents.

Dental Insurance: Both HMO and PPO plans are available. The District covers the employee at 100%, regardless of the selected plan; dependent coverage is available at the District's rates.

Life Insurance: A term life insurance benefit is provided.

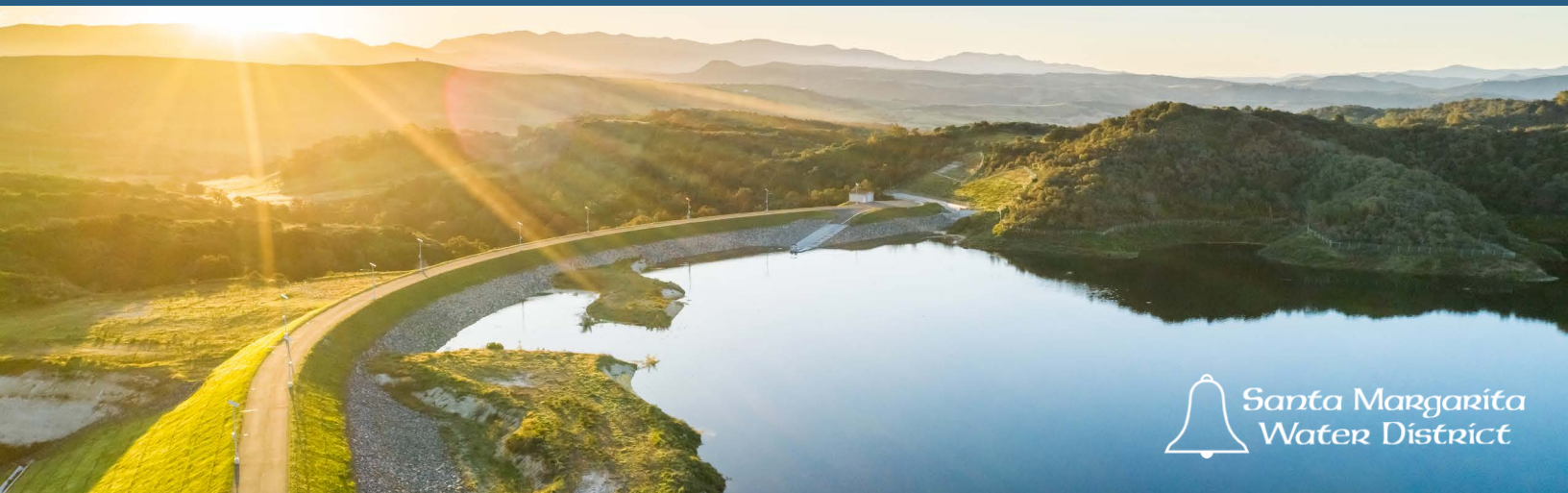
Vision Insurance: The District offers a Vision Service Plan (VSP) and pays the full cost for employees and their dependents.

Paid Time Off: The District has a generous combined program for time off, with a typical starting accrual rate of 140 hours annually, which increases with years of service.

Holidays: The District observes 11½ holidays per year.

Social Security: The District does not pay into Social Security and provides a private disability program at no cost to the employees.

Other Benefits: Other employee benefit programs are available, including deferred compensation with partial matching and a flexible spending program for medical expenses.



HOW TO APPLY

For first consideration, apply by **APRIL 10** at:

WBCP JOB BOARD



SAVE THE DATES

Round one virtual interviews will take place on **MAY 6**. Finalists will move forward to round two in-person interviews on **MAY 22**. *Selected candidates must be available for both dates.*

QUESTIONS?

Please contact your recruiter, **Lauren Gerson-Greene**, with any inquiries:

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