

	Job Description District of Oak Bay
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Position Title:	Manager of Financial Planning
Reports To:	Deputy Director of Financial Services
Position Description Date:	October 2025
Positions Supervised:	

Nature and Scope of Work:

Reporting to the Deputy Director, the Manager of Financial Planning is responsible for planning, coordinating and supervising the preparation and presentation of the District's financial plan. The incumbent is a key member of the management team who proactively assists the Deputy Director and the Director of Finance in the development of policies pertaining to financial services, implementing these policies to achieve the desired results. The incumbent may be responsible for, but may not be limited to, ensuring the effectiveness of payroll, investments, financial systems, internal audit and other related and assigned duties. Work performance and results are reviewed by the Deputy Director in evaluating objectives are met in an effective and timely manner.

Key Accountabilities:

- Manages the financial planning process and prepares the annual financial plan in accordance with local government legislation.
- Manages all activities related to long-term financial planning and budget development including budget submissions and supporting data for all District departments.
- Oversees the payroll process to ensure timely and accurate payment of all District employees, maintaining compliance with relevant legislation and internal policies.
- Manages payroll controls, audits, and reporting to support transparency, accuracy, and continuous improvement in payroll operations.
- Provides analysis and develops reserve investment recommendations ensuring accuracy, completeness and reasonability to District guidelines, bylaws and procedures.
- Oversees the function to track and forecast expenditures through quarterly variance reports and capital project expenditure status reports.
- Attends Council and other meetings upon request and provides advice and information on financial planning matters.
- Provides accounting and finance related support and advice to all District departments. Develops and proposes financial policies and guidelines as required by the Deputy Director. Ensures financial practices and guidelines are followed.
- Manages the work of a group of subordinates engaged in financial support services.
- Liaises with external private and public organizations as necessary to fulfill the responsibilities of this position.
- Liaises with department heads and representatives concerning various revenue and expenditure accounts.
- Manages the Financial Planning section with responsibility for the recruitment, selection, training, performance, including discipline and termination as required.
- Prepares reports for senior management and Council.
- Develops, implements and monitors adherence to corporate financial policy and procedures.
- Prepare FOI responses related to historical financial results.
- Acts for Deputy Director as required.

- Other related duties as required.

Required Knowledge Skills and Abilities:

- Broad exposure to complex fund accounting and considerable experience working with complex financial systems (experience with Vadim would be an asset).
- Good working knowledge of financial accounting and reporting requirements as per the Public Sector Accounting Board (PSAB), knowledge and experience related to legislation such as the Local Government Act, and the Community Charter is required.
- Proven ability to develop and implement business process improvements and incorporate best practices that drive sound decisions and ensure fiscal accountability.
- Embraces change and develops implementation plans to effectively communicate, build commitment and overcome resistance.
- Exemplifies leadership excellence through the display of optimism, building trust and mobilizes others to understand the corporate vision.
- Leads the way by developing strong working relationships with all stakeholder groups, and senior leadership
- Demonstrated management experience in a client-focused environment, ideally in a unionized environment.
- Knowledge and experience working with MS Office programs, SharePoint and other relevant software.

Qualifications and Experience:

- A Bachelor's Degree in Accounting or Business.
- A Certified Professional Accountant (CPA) Designation.
- A minimum of 5 years of related management experience in a unionized environment.
- Experience with financial systems including point of sale and billing systems.
- An equivalent combination of education and experience will be considered.