DISTRICT OF OAK BAY

The Corporation of the District of Oak Bay
Job Description

Job Title:	**SENIOR FINANCIAL ANALYST**	**JEPE Number:**	#
Department:	Finance	**Pay Grade:**	15
Supervisor	Director of Finance	**Position Status:**	Regular – Full Time
Effective Date:	June 13, 2023	**Position Type:**	Union
Reviewed or Amended Date:		**Approved by:**	Director of Finance

Job Purpose:

Reporting to the Director of Finance, this position involves complex accounting and budgeting work at a professional level. This position advises departments in the preparation of annual operating and capital budgets and reviews submissions for completeness and adherence to policies and regulatory requirements; assists in the development and maintenance of long-term financial plans and related forecasting models; and develops financial and business analyses for various organizational initiatives. Considerable independent judgement and action are exercised in the work. Work performance is evaluated by a superior for efficiency, accuracy and conformance with established policies and procedures.

Duties and Responsibilities:

- Assists and advises departments in preparing capital and operating budget submissions; reviews submissions for completeness, accuracy, content, and adherence to municipal policies and regulatory requirements.
- Prepares and maintains instruction manuals and other documentation for the annual budget process including training and supporting internal staff.
- Maintains reserve cash flows and budget files.
- Develops and maintains financial analytics and forecasting models for use in budget development, variance forecasting and other reports.
- Consolidates departmental budget submissions and other data in the development, maintenance and communication of the District's long-term financial plans to external and internal stakeholders.
- Reviews all government or other grant applications to ensure that they meet Finance Department requirements, are properly reflected in the budget, and that funds are subsequently received and properly accounted for.
- Analyzes a variety of data and prepares financial, statistical and analytical reports and related documentation and correspondence as required; oversees reserve cash flow projections; prepares reports for senior leadership on matters such as project cost effectiveness and alternative funding sources.
- Prepares year-end adjustments and working papers for use by the municipality's auditors as required.
- Analyzes existing and proposed accounting requirements and systems, and as appropriate recommends changes in accounting processes and procedures.
- Undertakes special projects and assignments as required.
- Performs other related duties and responsibilities as assigned.

Demonstration of the District's Workplace Values - CARE:

- **Connected** means we serve the community and each other with friendliness, kindness,

professionalism, and respect – working as one team, sharing knowledge and supporting one another.
- **Accountable** means we do what we say we will do, take pride in our work and act with integrity.
- **Responsive** means we believe that finding better ways to serve is part of our growth and that progress and personal connection can co-exist.
- **Effective means we deliver sustainable results in ways that nourish people.**

Required Knowledge, Abilities & Skills:

- Thorough knowledge of accounting principles, practices, procedures, systems and controls applicable to the work.
- Considerable knowledge of public sector budgeting principles and practices.
- Considerable knowledge of the laws, regulations and statutory requirements governing the work.
- Sound knowledge of the organization and the functions of various departments.
- Skilled in computer applications such as Windows 11, Microsoft 365 Word, Outlook, Powerpoint, OneDrive, Sharepoint and Teams.
- Proficient with Microsoft Excel, including Power Query.
- Ability to analyze and interpret a variety of financial, budget and accounting information and to develop logical solutions to budget variance and financial reporting issues.
- Ability to prepare and analyze a variety of financial and statistical reports and data.
- Ability to establish and maintain effective working relationships with a variety of contacts.
- Ability to communicate effectively orally and in writing and to convey complex financial information

Qualifications:

- Completion of 4 years in a recognized accounting program.
- Minimum of 6 years of progressive related experience, ideally within the public sector or a unionized environment, or an equivalent combination of training and experience.
- Professional accounting designation and member in good standing with CPA Canada.
- Public Sector Procurement courses and experience would be an asset.
- Experience with Tempest and Vadim software would be an asset.
- Experience with Microsoft 365 Power Platform (Power BI, Power Automate, Power Apps) is an asset

Required Licenses, Certifications and Registrations

- No special licenses or certifications required.