## PEA Job Description

### 1. Position Identification

<table>
<thead>
<tr>
<th>Position Number</th>
<th>992724</th>
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<tbody>
<tr>
<td>Position Title</td>
<td>Finance Officer</td>
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<tr>
<td>Department</td>
<td>Faculty of Human and Social Development</td>
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<tr>
<td>Reports to</td>
<td>Dean of Human and Social Development</td>
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<tr>
<td>Number of Direct/Indirect Reports</td>
<td>Direct __ __ Indirect 10</td>
</tr>
<tr>
<td>Classification Level</td>
<td>SG 12</td>
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<tr>
<td>Current Incumbent (if applicable)</td>
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### 2. Position Summary (brief summary of the position in relation to the work unit/department)

The Faculty of Human and Social Development is a large, complex and diverse Faculty with a complement of 100 regular faculty members, 50 regular support staff distributed across 6 professional academic units and one program. It also includes 3 core faculty services of the HSD Research Centre, the HSD Indigenous Student Support Centre and the Family Centre.

Reporting to the Dean, and in collaboration with the Associate Dean(s) and Academic Administrative Officer, the Finance Officer is responsible for the accurate and efficient management and administration of the Faculty of Human and Social Development’s financial resources. This position contributes to financial decisions and monitors various financial accounts related to departmental or program operations and faculty research that fall under the organization of the Faculty.

The FO works collaboratively with and provides leadership, advice, direction and problem solving for unit heads and senior administrative staff of the Faculty related to the budget functions of the Faculty.

The Finance Officer is also responsible for acquiring, managing and providing analytics on metrics pertaining to financial, student and course data for the Faculty, and participates on special projects related to finance and data analysis. The position continuously evaluates financial processes and procedures within the Faculty, making recommendations for improvements and implements University processes and policy changes where necessary.

The Finance Officer liaises with the Offices of the Vice-President Academic and Provost, Research Services, Research Centres, Finance and Operations, External Relations, and Student Services on related finance and analytic projects. This position is also responsible for managing the financial functions required for the operation of 3 core services.

### 3. Key Responsibilities and Expectations (identify 3 to 5 key responsibilities and expectations for each)

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<tr>
<th>Key Responsibilities</th>
<th>% of time</th>
<th>Expectations:</th>
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<tbody>
<tr>
<td>Financial Leadership and Support (60%)</td>
<td>• Works collaboratively with the Dean, Associate Dean(s) and Academic Administrative Officer (AAO) on annual Faculty budget submissions by providing statistics, calculating costs and projecting expenses.</td>
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<td>• Acts independently to execute and reallocate budget based on the approved academic and resource plan.</td>
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<td>• Leads financial forecasting for the Faculty and analyzes budget variances.</td>
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Provides advice and information to directors, senior staff, and faculty members about budget process and explanation of accounts including historical analysis as required.

Gathers and analyzes program, financial or enrolment data required for Deans' consideration. Make recommendations based on analysis of data.

Supports Dean, Assoc Dean(s) and Directors to evaluate financial and enrolment implications of academic programming.

Makes recommendations to the Dean regarding budget carry over for all accounts and executes approved plan.

Monitors the successful and timely completion of fiscal year-end closing ensuring budget commitments and recoveries are met.

Approves budget expenditures related to the efficient functioning of the Office of the Dean and provides assistance to other members of the office in procurement and payment of equipment and services.

Provides accurate and current data for the numerous accounts within the Faculty of Human and Social Development, including accounts that fall under the six units of the Faculty, the endowment accounts, and the special purpose accounts.

Monitors and ensures the appropriate budget is in place for the appointment of TAs, sessionals, faculty and staff prior to the Dean signing off.

Provides accurate and current data of faculty salaries, stipends and supplements.

Maintains a record of start-up funding accounts and their use.

Acts as a liaison with the Vice-President Academic's office, Budget Office, Payroll and Research Services to discuss budgetary requirements and resource planning as it relates to the Faculty of Human and Social Development including base budget related to faculty and staff positions.

Designs and executes complex Excel data tracking systems, including creation of advanced excel look-ups, formulas and links to other data to efficiently and accurately forecast Faculty budget recoveries and expenditures.

Under the direction of the Dean/Associate Dean assists with the determination of sessional budget allocations based on established criteria and Faculty policy.

Implements and approves purchases related to computer acquisition funds for faculty members and academic equipment funds for the six academic units in the Faculty of Human and Social
Faculty Management

Development based on pre-approved allocations from the Dean.

- In consultation with the Dean/Associate Dean(s) and AAO, participates in hiring of admin team positions in Dean’s office and other units within the Faculty as required.
- Attends meetings of AOs (chaired by the AAO) from units across the Faculty to disseminate information, formulate best practices, and creates policy on faculty financial and administrative matters between the units and the office of the Dean of Human and Social Development as required.

Metrics & Data Management

10%

- Monitors, gather and analyze academic and research metrics, using university IT systems, external agency systems and by consultation with units for the Dean and Associate Dean(s). Examples include funding levels and success rates from Tri-Council and other agency competitions; researcher metrics; and student and course data.
- Develops statistical reports and presents findings to Dean and Associate Dean(s) for the purposes of strategic planning and decision-making.
- Updates Faculty excel data base with information related to enrolment and defined teaching capacity as required, creates reports, lists, charts, graphs (using Microsoft Suite) and advanced Excel spreadsheets involving pivot tables & formulas.

4. Classification Factors:

(a) Independence of action, authority and decision making:

Works collaboratively with the Dean and Associate Dean(s) of Human and Social Development in the development of methods, practices and procedures within broadly defined policies. Takes independent initiative and responsibility for implementing plans to achieve goals, and acts independently in the daily management and administration of the Faculty’s budget.

The Finance Officer takes direction from the Dean and Associate Dean(s) in defining the scope of the analytics required, but the Dean and Associate Dean(s) rely on recommendations made by the Officer as a result of the analyses.

(b) Accountability – scope and impact:

Financial and related project goals and objectives are set by the Dean and Associate Dean(s). Individual actions and decisions have a major impact on the objectives and/or results of the academic/programmatic and financial and analytic services provided for the Faculty of Human and Social Development. The Officer is central to the financial functioning of the Faculty of Human and Social Development and the Office of the Dean by supporting the management of the Faculty’s operating budget and acting as the operational contact in the Faculty for all finance and accounting related issues and follow up with key stakeholders as required. Represents the Faculty as a liaison with the Vice-
President Academic's office, Budget Office, Payroll and Research Services on financial matters.

The Officer works in partnership with stakeholders to continuously seek to improve financial processes and procedures within the Faculty.

The Officer supports the Faculty’s academic and resource allocation planning and decision-making processes (including research, financial, personnel, capital, information technology, etc.)

(c) Supervision given and received:

The position is supervised by the Dean but works independently and in collaboration with the Associate Dean, the Faculty AO and School Directors. The position backs up the Faculty AO in administration of the Dean’s office and indirect supervision of Academic AO in the Schools/units. The Program Manager provides indirect support and mentoring, and ongoing direction, training, and policy interpretation across the Faculty within its 6 academic units, one program and 3 core services in the areas of financial systems, policies and procedures.

(d) Budget, Financial & Material resources:

Considerable independence and authority is provided when executing duties of this position; this position holds authority, as delegated by the Dean. Approves financial expenditures related to the daily operation of the Office of the Dean of Human and Social Development. Responsible for the accurate and unmonitored execution of budget transactions for a Faculty with a combined budget of over $16M. Also responsible for making recommendations on budget allocations and expenditures requiring detailed specifications and financial costing. Holds purchasing limit of $2,500.

(e) Problem-Solving

Duties require effective analysis and handling of situations, policies, procedures and past precedents to address problems, develop strategies, and provide advice. Data gathering and management requires in-depth analysis of complex and variable problems as well as critical thinking and judgment to identify efficient and effective budget scenarios that require investigation and interpretation to develop recommendations and solutions.

The Finance Officer is required to lead finance related change initiatives and develop, implement and support new or modified approaches, practices and processes in the Faculty. This also requires continuous analysis of the change process to make necessary adjustments to maximize effectiveness.

The Finance Officer is required to lead administrative initiatives and develop, implement and support new or modified approaches, practices and processes in the Faculty.

5. Summary of qualifications:

A Bachelor’s degree in business, finance, accounting or related field plus a recent completion or near completion of a professional accounting designation (CGA/CPA).

5 years of experience in an accounting or financial role in a post-secondary environment with proven experience in budgeting and financial analysis of large and complex budgets, forecasting, management and leadership.

Experience supervising and coaching administrative support and professional staff.

Related experience in an academic (or equivalent) environment with an understanding of University structure, policies, and procedures is an asset.
An equivalent combination of education, experience, and training may be considered.

**Skills, abilities and knowledge:**
- Excellent communication skills with strong written and verbal skills
- Strong organizational skills with ability to manage multiple budgetary and procedural projects, prioritize, use judgment and make decisions independently, be self-motivated, and consistently meet deadlines.
- Strong interpersonal skills with ability to building and maintaining productive and supportive working relationships, with integrity, diplomacy and tact, and the ability to work as part of a team.
- Superior level of skill in a networked, computer environment that includes software packages such as Word, Excel, Outlook, and Share Point.
- Knowledge of University systems such as ViewCat, Fast Finance, Journal Voucher, Budget and Forecasting, WebReq, FAMIS, is an asset.

Date of Submission: 

Signature of Responsible Manager: 