Job Description

**Job Title:** Performance Measurement Analyst  
**Department:** School of Accounting and Finance  
**Reports To:** Administrative Officer  
**Jobs Reporting:** NA  
**Salary Grade:** 10  
**Effective Date:** September 2017

**Primary Purpose**  
The Performance Measurement Analyst (PMA) performs regular analysis and reporting in support of the School of Accounting and Finance’s strategic planning and reporting. The PMA is accountable to the Administrative Officer for providing leadership and direction for the financial management of the School.

Working with the School’s Director and Administrative Officer, the Performance Measurement Analyst provides both financial and non-financial performance results and projections. The PMA will establish and maintain practices for fiscal accountability, ensure that sound accounting practices are in place within the School, and that financial activity in SAF conforms to the University’s financial practices. The PMA will participate in long- and short-term strategic planning for the School, assess and resolve financially related issues in consultation with Arts’ Faculty Financial Officers as required, and create and provide guidance on relevant policies and procedures. The PMA will work on a variety of projects for the School under the direction of the Administrative Officer and/or the School’s Director.

**Key Accountabilities**  
List the major responsibilities of the job, divided into 3 to 5 broad categories. These should reflect 80 - 90% of “what” the job does not the “how”. Insert a category heading and in bullet form below, state specific responsibilities.

**Financial analysis**

- Responsible for financial management, analysis and reporting to the Director and the Administrative Officer on all School operating, trust, endowment and research accounts.
- Liaises with Arts’ Faculty Financial Officer and Faculty Financial Officer (Research) on issues of policy and interpretation; provides support to periodic audit by Arts’ FFOs.
- Serves as the School’s reviewer for expense claims, including research claims; refers high risk/high materiality claims to the Faculty Financial Officer (Research) as required by university procedure.
- Report quarterly to all external Boards for the various Centres.
- Preparation and distribution of monthly reports on the status of faculty start-up grants, chairs/professorships, other research grants.
- Planning and coordinating the development of the School’s annual operating budget in consultation with the Directors, the Administrative Officer, and the Faculty Financial Officer.
- Report monthly to the Administrative Officer on the financial status of all budgets under the School Director’s jurisdiction.
- Conduct short and long term (five year) financial planning to project and ensure fiscal sustainability.
- Monitor procedures for financial monitoring of income and expenses on all accounts under the School Director’s jurisdiction.
- Review financial reports for the School throughout the year, discuss potential problems with the Administrative Office and Director.
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- Review expenditures to ensure proper use of University funds; approve expenditures as appropriate.
- Prepare reports as required by other areas within the School.
- Compile statistics, provide survey information and complete questionnaires for internal and external sources.
- Liaise with the School Administrative Officer on financial matters pertaining to new start-up grants, expenses, budget reallocation, and on special reporting as requested by the Director.
- Respond to requests from Arts FFO or FFO (Research), and from the Finance or Research Offices related to financial matters.
- Monitor and advise on various procedures and transactions related to fiscal year end.
- Provide support for any other School activity that has financial implications or needs.
- Initiate financial corrections and changes, as required.

### Student statistics – recruiting, retention, performance

- Assess SAF success in student engagement, student performance, student retention and in realizing goals and objectives of the School’s academic programs using established performance measures and reporting standards (by program, by term)
- Monitor student performance (such as academic performance; awards and other indicators of quality; graduation rates)
- Analyze and report on retention data each term
- Project for required enrolments to achieve the School’s established targets. Report on applications versus show ratios.

### Review, establish, and monitor various quality and accountability measures and benchmarks

- Class/section sizes
- Student: faculty ratios
- Quality of faculty – balance between teaching and research faculty, highest degree, professional designation, etc.
- Retention, time to program completion, graduate rate
- Program and curriculum quality
- Analyses of course evaluations
- Results that can be observed from university-wide student surveys such as NSSE, CUSC and GPSS
- Internationalization
- PhD offerings
- External program appraisals
- Fiscal management
- Other Sixth Decade measures

### Faculty statistics – teaching, research, service

- Report annually on faculty grant, publication, award, editorial board and professional recognition success rates
- Manage and report on research database subscriptions (expiry dates, notifications, funding sources, accessibility)
- Liaise with faculty researchers on financial matters relating to research accounts. Ensure that these accounts are reviewed and reconciled each month.
- Support faculty members in developing budgets for grant applications.
- Ensure eligibility and compliance with granting agency requirements
- Monitor accounts to avoid deficits.
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- Process research-related expenses
- Liaise with the Office of Research on numerous issues related to research grants and project accounts, including reporting; attend training as appropriate to ensure currency of information and compliance.
- Provide advice and consultation to all faculty members on the operation and control of individual grants and contracts, consistent with University policies and procedures.

Required Qualifications

If hiring today, what would be the required education, experience, knowledge, skills and abilities?

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<tr>
<th>Education</th>
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<tr>
<td>University degree or equivalent education and experience and accounting designation required (CPA, CMA or CGA)</td>
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<th>Experience</th>
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<td>Several years accounting experience in a computerized financial environment, preferably using a web-based financial reporting package.</td>
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<th>Knowledge/Skills/Abilities</th>
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<td>Demonstrated high level analytical ability and data management experience.</td>
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<td>Aptitude for accurate and detailed work and the proven ability to prioritize and manage workflow in a high volume environment.</td>
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<td>Excellent interpersonal, oral and written communication skills</td>
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<td>Demonstrated ability to work well independently and in a team environment</td>
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<td>Excellent MS Office skills including MS Excel</td>
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Nature and Scope

- **Contacts:** Internal: Finance; Human Resources; Procurement and Contract Services; Office of Research; Graduate Awards Office; Undergraduate Awards Office; Administrative staff in other departments/schools; Directors within the School; Faculty members; visitors and post-doctoral fellows. External: Contractors and suppliers; External funding sources; Auditors
- **Level of Responsibility:** The job has specialized work with minimal supervision
- **Decision-Making Authority:** Makes decisions based on multiple factors: relevant policies, government regulations, strategic objectives. Often these objectives are competing, so judgment is required. Makes decisions about priorities and appropriate actions to take to address financial issues/concerns based upon transaction volume, dollar value, and risk. Makes decisions about how best to communicate with relevant clients.
- **Physical and Sensory Demands:** Minimal demands typical of an administrative position within an office environment. Occasional exposure to people who are upset and angry.
- **Working Environment:** Travel: none. Working Hours: Regular working hours, some evening/weekend work may be required.