

Job Description

Job Title:	Senior Manager, Institutional Budget and Resource Planning
Department:	Institutional Analysis & Planning
Reports To:	Director, Institutional Analysis & Planning
Jobs Reporting:	Institutional Analyst
Salary Grade:	USG 14
Effective Date:	March 1, 2012

Primary Purpose

The Senior Manager, Budget and Resource Planning in Institutional Analysis & Planning is accountable for providing proactive, timely and accurate data, models, and reports on a wide range of budget, financial and resource allocation issues. The incumbent leads a team of Institutional Analysts in providing timely and appropriate analytical support to the Provost's Office, Faculties, Departments, and other IAP teams. The incumbent manages and enhances IAP business processes and ensures that the stakeholders are provided with insightful analysis placed in its proper context.

Key Accountabilities

Budget & Resource Allocation Modelling

- Support the ongoing development of an institutional resource allocation model
- Support the implementation strategy for that model, including cost analyses, scenario building and modeling
- Work closely with the Provost, Deans, Office of Finance, Faculty Executive Officers, Faculty Financial Officers, administrative department heads, to ensure budget model assumptions and decisions are communicated and implemented effectively
- Calculate the income sharing and allocation mechanisms for budgets to Faculties
- Monitor and support of the financial aspects of the equity agreement between UW and the Affiliated & Federated Institutions of Waterloo (AFIW)
- Maintain historical databases to support the budget and resource allocation processes
- Design, develop and maintain analytical models for budget allocations and other financial analyses as required, using both financial and non-financial data

Income Projections

- Based on institutional enrolment forecasts developed within IAP and an understanding of the impact of government policies, prepare estimates of the institutional revenues from government grant and tuition
- Design, develop and maintain analytical models for revenue estimation
- Work with others in IAP to understand and optimally utilize enrolment projection models and environmental scanning information on government policy
- Lead the process of tuition fee modelling and reporting in support of fee setting processes

Resource Planning

- Provide senior administrators with analyses appropriate for decision-making regarding resource allocation, budget and financial planning
- Work with the Faculties and administrative units to assist in establishing a process that links budget to the operational plans, with appropriate reporting, monitoring and analyses
- Build and refine models to test the financial viability of new programs and initiatives

- Develop, in collaboration with other IAP teams and the senior leadership or their designates, tools, reports and systems to inform institutional decision making, planning, and resource allocation
- Anticipate and initiate collaborative partnerships to address institutional needs related to the budget and resource planning process
- Conduct analysis and comparisons of other universities budget/resource planning processes, tools, data etc. and evaluate for best practices and potential implementation at Waterloo
- Gather, analyze, interpret and disseminate highly complex information required for planning and decision-making at all levels of the University. This includes undertaking research and data analysis with respect to high-level institutional financial modeling, requiring detailed knowledge of impact of enrolment driven and other revenue, operating budget allocations, and other resource planning requirements
- Develop the resource/financial tools and mechanisms to support the implementation of the University's academic and strategic plans
- Develop and maintain financial/resource accountability frameworks to support the institutional and Faculty activity, working with others in IAP
- Perform various analyses, research, and reports that are of both an ongoing and ad-hoc nature
- Compile statistical and graphical information and prepare reports relevant to the development and implementation of policy and budgets, incorporating statistical analyses and graphical material for use by, and presentation to the Provost, Director, and other members of the senior leadership team

Leadership, Relationships and Collaboration

- Contribute to the development of strategic and operational plans for the IAP office and establishment of the priorities for the office
- Lead the Budget and Resource Planning (BRP) team ensuring its activities are grounded in reliable systems and processes that are effective and relevant to the various planning and reporting needs of the institution
- Ensure the BRP team acquires, develops and maintains knowledge of best practices related to budgeting and resource management in post-secondary institutions
- Guide the BRP team in building productive and collaborative relationships within IAP, with each of the Faculties, administrative units, and the senior leadership team
- Ensure the BRP team understands the potential impacts of decisions related to budget and resource allocation and that they are able to model, assess and speak directly to the impacts, potential impacts and consequences
- Develop an effective and efficient team environment by motivating, developing and supervising Institutional Analysts in the BRP team
- Ensure positive, supportive and collaborative relationships with other staff and colleagues in IAP, UW and external stakeholders
- Provide Institutional Analysts with professional expertise, coaching, mentoring and support
- Develop and nurture strategic relationships with key contacts at MTCU, Council of Ontario Universities, and other universities (within Ontario, Canada and abroad)
- Undertake and assist in advanced and complex research, collection, organization, and analysis of data and information and data
- Prepare technical and business reports and presentations, and undertake special projects as requested by the Director
- Assist the Director with developing IAPs multi-year budget and monitoring and tracking budget variance
- Advise Institutional Analysts on the selection and use of appropriate statistical and other methods for responding to the needs of IAP stakeholders
- Develop a productive, collegial working relationship with the IAP leadership team

Job Description



- Develop a facilitative approach in carrying out the day-to-day and strategic responsibilities.
- Prepare and deliver presentations at internal and external meetings or conferences.
- Participate in relevant internal and external committees and councils, or events

Required Qualifications

Education

- Bachelor's degree in Accounting, Finance, Business, Mathematics, Economics or another related discipline
- A Master's degree or a financial designation (e.g. CPA) is considered an asset
- A combination of education and experience may be considered

Experience

- 5+ years' experience in financial management and resource planning preferably within a post-secondary environment, or transferable experience
- Demonstrated leadership on an analytical, financial, or technical team
- Coordinating/managing analytical initiatives/projects
- Communicating analytical results and their implications
- Analyzing information, business models, or processes

Knowledge/Skills/Abilities

- Strong educational and professional background in financial, and other, data analyses
- Database development, management, and use
- Data transformation tools and applications
- Intermediate skills in Microsoft Office suite
- Project management
- Conceptualizing or developing new business models, databases, or processes
- Managing change within a team or organization
- Building productive relationships with a variety of stakeholders

Nature and Scope

- **Contacts:** Communication, facilitation, presentation, building consensus, diplomacy, problem solving, relationship building.
- **Level of Responsibility:** Staff management, leadership, influencing, coaching, directing.
- **Decision-Making Authority:** Coaching and leading staff; Provision of advice and recommendations to senior administrators
- **Physical and Sensory Demands:** Extensive computer use; prolonged sitting (e.g. office work, meetings)
- **Working Environment:** Office-based work, with meetings across campus; occasional travel