

Job Description

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| Job Title: | Director, Unit Budgets and Integrated Planning |
| Department: | Integrated Planning and Budgeting |
| Reports To: | Associate Provost, Integrated Planning and Budgeting |
| Jobs Reporting: | Integrated Planning and Budgeting Analysts |
| Salary Grade: | USG 16 |
| Effective Date: | January 2024 |

Primary Purpose

The Director, Unit Budgets and Integrated Planning reports to the Associate Provost, Integrated Planning and Budgeting and leads a team of Analysts responsible for providing support to Faculties and Academic Support Units (ASUs) across the University, assisting with unit operating budget development, organization, monitoring and supports. The Director is responsible for developing comprehensive knowledge of budgets, fostering partnerships with budget support teams in units across campus, and assisting units in developing multi-year integrated budget plans including staffing and hiring plans. The Director is accountable for providing proactive, timely, and accurate data, models, and reports to support a wide range of budget, financial and planning proposals and submissions. The Director will lead the team in the creation, maintenance, and delivery of training modules to support the university-wide move to integrated planning and budgeting.

The Director, as a member of the senior leadership team in Integrated Planning and Budgeting is also responsible for contributing to consolidated university budget preparation, allocation and reporting, including model design, development and maintenance. The successful candidate will contribute to the overall financial health of the institution by building relationships, and facilitating the adoption of best practices in financial analysis and integrated planning, to strengthen budgetary alignment with university priorities.

Key Accountabilities

Leadership and Supervision

- Lead and manage a team of Analysts, using effective and efficient processes and systems to deliver on strategic priorities and budgetary requirements.
- Provide guidance, mentorship, coaching, and professional development opportunities to team members.
- Responsible for developing a team that maintains current knowledge of budgeting and planning best practices, who can model, assess, and speak to impacts directly.
- Guide the team in building productive and collaborative relationships within the department and across the university.
- Ensure positive, supportive, and collaborative relationships with employees, colleagues, as well as internal and external stakeholders.

Strategic Budget Development and Planning

- Work closely with units across campus to build a thorough understanding of their financial obligations, and objectives.

- Support development of a process that links budget and operational plans, with appropriate reporting, monitoring, and analyses.
- Reviews and monitors budgets to ensure accuracy, and alignment with university strategic priorities.
- Provides guidance to team members on approaches to analyze and interpret operational and financial data, providing insights and recommendations for budget optimization.
- Helps support and refine models to test the financial viability of new programs and initiatives.
- Provide guidance on the design, development, and maintenance of analytical models for budget planning and other financial analyses as required, using both financial and non-financial data.
- Develops financial accountability frameworks to support integrated activity.
- Supports the maintenance of historical databases to support the budget and planning processes.
- Conducts environmental scans of comparable organizations budget and planning processes, tools, and data to evaluate best practices.
- Works with internal stakeholders to prepare the annual budget.

Partnership Building

- Works collaboratively with colleagues in various units, including Finance and Institutional Analysis & Planning (IAP) to coordinate budget support roles to ensure alignment and coordination.
- Collaborates with academic leaders, department heads, and other stakeholders to establish effective partnerships for budget planning and execution.
- Facilitates communication between Faculties, Academic Support Units and Integrated Planning & Budgeting

Workforce Financial Planning

- Support unit workforce planning processes, helping units to appropriately plan for resourcing needs and costs.
- Collaborate with HR, Finance and other units to align workforce planning with budgetary optimization and organizational goals.
- Contribute to the development of institutional staffing and hiring cost planning tools and models.

Integrated Forecasting and Reporting

- Support the integration of revenue projections including enrolment-related and non-enrolment-related revenues, including cost recoveries.
- Support the design and development of resource models, costs analyses, scenario building and modeling to support units in long-term financial planning.
- Oversee the development of budget forecasts and reports, providing accurate and timely information to senior leadership.
- Conduct analysis to advise senior leaders on the identification of financial opportunities, risks, and strategies for sustainable growth.
- Lead work to conduct financial analyses to support decision-making at the institutional level.
- Identify trends and potential financial challenges and provide recommendations for resource optimization and efficiency improvements.
- Stay up to date with relevant financial regulations, policies, and guidelines.

Budget Training and Support

- Establish and promote best practices related to budgeting and resource management.

Job Description



- Advise on the selection, development and use of appropriate data sets, reports, tools and other methods for responding to budget inquiries and requests.
- Develop and implement training programs to enhance the budget planning skills of staff in units across campus.
- Conduct workshops and seminars on budgeting principles, financial management, expense monitoring and budget forecasting.
- Develop and deliver presentations to internal and external stakeholders at meetings and conferences.
- Participate in relevant internal and external committees and councils and events.

**All employees of the University are expected to follow University and departmental health and safety policy, procedures, and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess, and correct health and safety hazards, as required.*

Required Qualifications

Education

- Bachelor's degree in finance, accounting, business administration, economics, mathematics or a related field
- A Master's degree or a financial designation (e.g. CPA) are strongly preferred
- A combination of education and experience may be considered

Experience

- 5+ years' experience in financial management and resource planning preferably within a postsecondary environment, or transferable experience
- Proven experience in budgeting, financial analysis, and planning
- Demonstrated leadership on an analytical, financial, or technical team

Knowledge/Skills/Abilities

- Strong leadership and team management skills
- Excellent communication and interpersonal abilities
- In-depth knowledge of budgeting principles and financial management
- Data transformation tools, applications, and management
- Knowledge of the University's policies and procedures, and the academic culture on campus
- Understanding of, and experience working with, university governance processes
- Ability to work independently and in teams. Ability to function as a collaborative team player who recognizes the value of strong, collegial relations with colleagues, both within the office and more broadly across the University
- Superior written and oral communication skills
- Discretion and ability to maintain confidentiality
- Strong time-management skills and excellent attention to detail
- High capacity for work and a willingness to do extra when required
- Ability to pivot quickly, exercise sound judgment in adjusting priorities, and be flexible with workload
- High level of maturity and empathy; highly developed interpersonal skills
- Strong organization and analytical skills

Nature and Scope

- **Contacts:** Internally communicates across campus with all employees, departments, and levels, including senior leadership, facilitating, presenting, building consensus, problem solving, influencing, motivating others, and building relationships. Externally communicates with government bodies and relevant agencies.
- **Level of Responsibility:** This position is responsible for the provision of advice and recommendations to senior administrators on budgeting and planning, as well as coaching and leading staff.
- **Decision-Making Authority:** Responsible and accountable for establishing priorities and strategic direction of budgeting and planning, in addition to staff management, leadership, guiding, and mentoring.
- **Physical and Sensory Demands:** Demands typical for operating in an office environment. The work requires continuous use of a computer, and other technology.
- **Working Environment:** Most of the work is performed in an office environment. The position involves some exposure to stress as a result of pressures associated with handling ongoing multiple demands and budget deadlines.