

## Job Description

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<b>Job Title:</b>	Executive Officer
<b>Department:</b>	Co-operative and Experiential Education
<b>Reports To:</b>	Director, Co-operative and Experiential Education
<b>Jobs Reporting:</b>	Executive Assistant (2 reports), Financial Assistant, Facilities Coordinator
<b>Salary Grade:</b>	USG 14
<b>Effective Date:</b>	March 1, 2017

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### **Primary Purpose**

The Executive Officer (EO) supports the Associate Provost (AP) and senior administration of the Co-operative and Experiential Education (CEE) portfolio, and is a member of the leadership team. This position also provides leadership and support on special projects and strategic initiatives, and serves as an advisor to senior administration on confidential and non-routine matters. The Executive Officer is responsible for financial oversight of the portfolio, management of the human resources activities, support for intra-department/faculty councils and committees led within the portfolio (e.g. the Co-operative and Experiential Education Council), tracking and facilitation of certain experiential education activities across campus, and management and oversight of other administrative functions as required.

### **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.*

#### **Leading the strategic planning process, including but not limited to:**

- Aligning CEE portfolio objectives with department goals/outcomes
- Facilitating the planning process for the units within the portfolio
- Co-ordinating the documentation and communication of portfolio and department goals/outcomes
- Contributing to the development of the portfolio’s strategies and objectives
- Tracking and reporting progress on strategic initiatives
- Providing the AP with confidential and strategic advice, information, and data to support decision making
- Coordinating plans with the need for resources, including space, human resources, and information technology.

#### **Supporting and co-ordinating Human Resource activities, including but not limited to:**

- Working with managers to
  - provide consistent systems and processes for recruitment, evaluation, promotion, professional development, and retention of all staff within the portfolio
  - design creative solutions for filling staffing vacancies to accommodate temporary absences, reductions, or shifting priorities, balancing the goal of skills development for existing staff with business requirements.
  - ensure consistent on- and off-boarding practices are followed
- Initiating and supporting regular review of structures and staffing to share best practices and create appropriate consistency across the portfolio.
- Managing the annual staff performance review process; providing mechanisms to ensure consistency of application of performance scores and timely submission of performance evaluations.
- With CEE department heads, developing guidelines that ensure that coaching, training and other development opportunities are available to all staff members
- Ensuring processes are in place for recruitment, evaluation and pay of temporary employees, casual staff, TAs and co-op students.
- Reviewing new or revised role descriptions for alignment within the portfolio

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- Liaising with Human Resources as the central resource for the CEE portfolio, and keep human resources records as required
- Ensuring adherence to University policies in all operations and activities (e.g. privacy, document retention, accessibility policies)

### **Financial oversight, including but not limited to:**

- In conjunction with the heads of the AP, CEE units, developing annual operating budgets and rolling two-year expense projections ensuring University wide strategic plans and goals are met.
- Ensuring that sources of funds (co-op fee, student services fee, operating funds) are appropriately aligned and reported with staffing and other expenditures.
- Analysing expenses and future enrolments to recommend a co-op fee annually, and ensuring timeliness and appropriate consultation (with students and others) on the fee; ensuring the purpose and calculation of the fee are well communicated, in conjunction with Co-op department staff
- Creating and monitoring a financial framework and tracking structure that supports the mix of sources of funds and departments within the portfolio
- Advising department heads on budget and expense related matters, including development of guidelines such as city differentials, home office costs, etc.
- Performing ongoing monitoring of budgets and financial transactions during the fiscal year, as required and ensuring that all operating accounts are soundly managed
- Reviewing department budgets with department heads, and the portfolio's financial position with the Associate Provost on a regular basis
- Ensuring the successful execution of the undergraduate research internship (URI) program or other related initiatives as they arise
- Providing financial input to the portfolio's strategic and operating plans
- Developing, improving and promoting strong internal controls for financial processes and transactions to minimize risks.
- Providing accountability reporting to external government agencies (including MAESD AccessAbility reporting) and internally to student and faculty groups (including SSAC – Student Services Advisory Council and the Co-operative and Experiential Education Council) on an ongoing basis.

### **People and process leadership, including but not limited to:**

- Leading the Executive Office team, ensuring staff members are informed, engaged, developed and working effectively together
- Ensures agreed processes are followed consistently, goals met, and appropriate metrics identified, tracked and communicated openly and frequently
- Providing leadership for communication and documentation of the executive office's processes and procedures
- Representing the portfolio on certain University-wide committees (e.g. Space, Records management, Financial Review)
- Ensuring the effective and efficient operation of the various councils and committees supported by the portfolio and serving as a resource to such committees as required
- Ensuring compliance with document management policy
- Serving as a resource within the portfolio for the interpretation and application of UW and portfolio policies, guidelines and practices
- Ensuring internal communication of administrative matters and changes takes place.

### **Collaboration management**

- Communicates effectively and maintains a positive working relationship with the UW Finance Department, external auditors and reporting agencies as the financial representative for all CEE business units. Provides guidance on processes that impact the operating budget, financial compliance and stewardship of assets.
- Participates and provides leadership and financial expertise for internal campus department audits or other university audits, as required.
- In conjunction with Directors, assess programs as needed and provide strategic financial recommendations promoting the overall goals and directives of student services.

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- Identifies opportunities for systemic financial process improvements across all units, including reporting process and transactions.
- Communicates effectively and maintains a positive working relationship with the UW Human Resources Department and the Plant Operations department, representing all CEE departments.

### **Required Qualifications**

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

#### **Education**

Undergraduate degree in accounting, business or equivalent. Recognized accounting designation is an asset. Additional education or training in human resources administration is an asset.

#### **Experience**

- Ten years' experience in progressively more responsible administrative, financial and management roles.
- Demonstrated success in establishing frameworks for managing and communicating somewhat complex budgets and financial reports
- Significant experience with human resource management, issue resolution and sound understanding of legislation related to hiring and managing employees.
- Experienced team leader.
- Advanced knowledge of and experience interpreting UW policies, procedures, and guidelines preferred.

#### **Knowledge/Skills/Abilities**

- Must possess outstanding leadership and management skills.
- Ability to build agreement without relying solely on authority.
- Must be able to quickly assimilate information and analyze data.
- Outstanding verbal and written communication skills and a proven record in demonstrating tact, judgment, and diplomacy.
- Must be confident, organized, and an accomplished problem solver.

### **Nature and Scope**

- **Contacts:** extensive interaction with managers in the portfolio (approximately 30) in an advisory and problem-solving capacity. Extensive interaction with other units on campus including but not limited to Finance, Human Resources, Plant Operations, Secretariat, the offices of the Provost and President; communications and interactions with committee members including faculty members and students. Contact with government and NGO representatives in support of policy and practice-related activities in the portfolio.
- **Level of Responsibility:** leads a team of four to seven administrative and financial staff; responsible for reporting and monitoring a budget of approximately \$14million.
- **Decision-Making Authority:** In collaboration with the Directors and management teams, responsible for the development and implementation of strategic plans, budgets, best practices and process improvements that support the departments' mission and goals. Is responsible for identifying changes in policies or systems and ensuring that they are communicated and procedures are put into place to implement them. Responsible for implementing the performance appraisal program plan.
- **Physical and Sensory Demands:** Minimal demands typical of a senior position operating within an office environment.
- **Working Environment:** This position works in a typical office environment. There may be unusual hours or schedules and varying volumes of work at different times of the year. Exposed to stress and pressure associated with senior level responsibilities, significant financial oversight and confidential human resource leadership..