

## Job Description



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<b>Job Title:</b>	Integrated Planning and Budgeting Analyst
<b>Department:</b>	Integrated Planning and Budgeting
<b>Reports To:</b>	Director, Unit Budgets and Integrated Planning
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 10
<b>Effective Date:</b>	May 2024

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### **Primary Purpose**

The Integrated Planning and Budgeting Analyst reports to the Director, Unit Budgets and Integrated Planning and is responsible for providing support to units across campus, assisting them with the development and management of integrated plans and unit operating budgets that support the university's strategic goals. The Integrated Planning and Budgeting Analyst will work closely with staff in Faculties and Academic Support Units, providing support and expertise in budget planning, preparation, and monitoring. 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**

#### **Budget Preparation and Maintenance**

- Assist Faculties and Academic Support Units in the development and maintenance of annual budget plans.
- Provide guidance on budgetary best practices and compliance with institutional policies.
- Prepare revenue and budget projections for units to better understand their obligations, resources and the financial impact of decisions.
- Contribute to the development and oversight of financial, costing, and reporting models for internal stakeholders, including senior leadership.
- Monitors budget plans and expenditures for completeness of detail, accuracy of contents, and alignment with budget plans.
- Works to improve financial data quality to meet reporting and accountability requirements.

#### **Workforce Financial Planning**

- Collaborate with units and Human Resources to support development of unit workforce plans that align with budget constraints and future costing obligations.
- Support cost analyses related to staffing and position funding.

#### **Budget Training and Support**

- Collaborate with units across the institution to enhance financial literacy and promote a culture of fiscal responsibility and best practices.
- Conduct training sessions on budgeting principles and financial management.
- Present financial information in an understandable and compelling manner to facilitate decision-making.

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- Liaise with departments to assist in the development and maintenance of tools for financial analysis, budgeting, and forecasting of revenue, including enrollment and related tuition and non-tuition revenues.
- Respond and provide guidance to enable timely response and resolution to issues.
- Offer ongoing support and guidance to enhance budgeting skills within the units.

### **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.
- Builds collaborative relationships with unit leaders and support staff teams to ensure effective communication and cooperation in budget planning.

### **Data Analysis and Reporting**

- Analyze financial data to assess potential risks and provide insights and recommendations for budget optimization.
- Contribute to the preparation of accurate and timely financial reports using various systems and support account analysis, budget analysis, financial reporting, and decision making.
- Maintain existing financial reports and make improvements based on reporting needs.
- Provide recommendations to the Director and other members of the senior leadership team, and implement procedures to improve internal controls and increase efficiencies.
- Prepare data and provide analysis on financial information requested by government bodies and other relevant external agencies.

*\*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 Masters degree or a financial designation (e.g. CPA) is considered an asset
- A combination of education and experience may be considered

### **Experience**

- A minimum of 3-5 years of analytical or budget-related experience
- Experience with budgeting, financial analysis, or mathematical analysis methods, and/or project management or planning in a complex environment
- Experience making independent judgments and handling confidential information

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

- Strong analytical and problem-solving skills
- Effective communication and interpersonal abilities

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- Knowledge of the University's policies and procedures and with the academic culture on campus is an asset
- Being well-informed about and experienced working with University governance processes is an asset
- Ability to work independently and in teams.
- Being a collaborative team player who recognizes the value of strong, collegial relations with colleagues, both within the Office and more broadly within 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 that often requires management of multiple projects at the same time.
- 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 and departments. Works with the manager on developing and prioritizing projects and requests to meet demand. Externally communicates with government bodies and relevant agencies.
- **Level of Responsibility:** The position is responsible for supporting academic support units, assisting the Director, with respect to Integrated Planning and Budgeting at the University.
- **Decision-Making Authority:** Responsible and accountable for establishing the priorities for projects assigned by the manager in association with Faculty and Academic Support Units requests.
- **Physical and Sensory Demands:** Demands typical for operating in an office environment. The work requires continuous use of computer, and other technology to collect, communicate and review data, reports, and presentations.
- **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, time management, and priority setting.