

Job Description



Job Title:	Executive Administrator, Budgeting and Planning
Department:	Deputy Provost Office
Reports To:	Deputy Provost
Jobs Reporting:	none
Salary Grade:	14
Effective Date:	March 2020

Primary Purpose

This position is responsible for working with the Deputy Provost on the Waterloo Budget Model (WBM), and multi-year planning and budgeting activities. It also provides research, analysis and reporting functions in support of a wide range of Deputy Provost related activities.

Key Accountabilities

Support for Waterloo Budget Model (WBM), including but not limited to:

- Ensuring active participation of implementation partners including Finance, Institutional Analysis and Planning (IAP), Marketing and Strategic Communications
- Provide recommendations to the Deputy Provost for decisions to be made
- Work to align process timelines with budgetary requests
- Provide analysis and recommendations for timeline and model adjustments

Support for Integrated Planning needs, including but not limited to:

- Ensuring active participation of implementation partners including Faculties, Finance, Institutional Analysis and Planning (IAP), ASU's, and other central UW administration Groups
- Work to align planning timelines with budgetary requests
- Provide recommendations for timeline adjustments

Provides research, analysis, interpretation and reporting functions:

- Provides analytical support, information and reports in support of the planning, decision-making and performance measurement processes
- Sources, analyzes, verifies (and cleanses as needed), and interprets information related to the budgeting and planning for internal (e.g. planning/management/decision support), public (e.g. publications/presentations/ websites) and reporting (e.g. professional boards/academic councils) purposes
- Accountable for the identification of data sources and development of data definitions, as well as the recommendation of such to the Deputy Provost, and to members of UW's central and faculty administration

Communication and Education:

- Liaise with Faculties, Finance, Institutional Analysis and Planning (IAP), ASU's and other central UW administration groups
- Develop and maintain a positive working relationship and network of contacts among the Faculties and academic support units
- Support, communicate, and reinforce the values and objectives of the budget process
- Lead development of training and information sessions for finance officers across the institution

Leadership on Finance, Budgets and Planning

- Translates vision and strategy into operational plans

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- Ensures operational plans are delivered on time
- Resolves complex operational issues
- Supports university priorities
- Stays current on best practices across peer institutions

Support needs of Faculties and Academic Support Units:

- Develop an understanding of the individual budgeting processes as it relates to the central process
- Action development of reports needed by units to facilitate their planning
- Determine tools needed to support expense and revenue forecasts

**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 Business, Planning, Finance or a related discipline is required
- A Master's Degree or the Chartered Professional Accountant (CPA) designation is considered an asset
- Equivalent combination of education and experience will be considered

Experience

- 5+ years' experience in a senior administrative position related to office administration and financial experience working with multi-million dollar budgets including analysis and budgeting
- Significant experience in building consensus and influencing decisions in an academic environment
- Demonstrated leadership qualities and an institutional perspective
- Experience leading a team through change processes
- Senior academic leadership experience in more than one large department/school
- Several years' experience with key operational issues including finances and space
- Experience developing/delivering training and education; teaching experience an asset

Knowledge/Skills/Abilities

- Ability to support team-based efforts to enhance outcomes
- Demonstrated ability to provide motivational support to others
- Excellent people skills including the ability to develop and maintain constructive relationships with individuals across campus and at all levels
- Ability to communicate technical material to a broad range of stakeholders
- Maintains confidentiality and demonstrates a sensitivity to diversity
- Demonstrated ability to manage change
- Solid analytical ability, judgement and creative thinking skills to solve complex issues including brokering and facilitating effective solutions
- Demonstrated creative and critical thinking skills to explore, make connections, and discover knowledge
- Well-developed numeracy, analytic and research skills
- Ability to take ownership for projects of duration of several months; use good independent judgment when priorities are challenged

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- Use sound methods to plan, track and report work

Nature and Scope

- **Contacts:** Internally communicates with senior leadership and senior employees across all areas to deal with and resolve issues related to area of responsibility. Individual must be able to influence and motivate stakeholders on issues that impact the entire organization.
- **Level of Responsibility:** This position is expected to be forward-looking, aware of trend and bring innovation and creative concepts, opportunities and recommendations to the Deputy Provost and Associate Vice-President Integrated Budgeting and Planning
- **Decision-Making Authority:** Responsible and accountable for all aspects of the role as outlined above with particular emphasis on operational and strategic initiatives.
- **Physical and Sensory Demands:** Position has ongoing deadline pressure with rapidly evolving priorities that may compete with each other; an unpredictable workload; continuous interruptions by others on an ongoing basis; and exposure to emotionally charged situations
- **Working Environment:** May include exposure to disagreeable conditions. May be exposed to stressful situations consistent with senior level responsibilities in a complex academic environment. Position may include long hours and occasional travel required.