SIMON FRASER UNIVERSITY
ADMINISTRATIVE & PROFESSIONAL
JOB DESCRIPTION

Position Title: Manager, Operations and Financial Analysis
Department: Beedie School of Business
Reports to: Director, Administration
Employee Group: APSA

Position #: 00112741
Reports to [pos #]: 00096770
Grade: 9

POSITION SUMMARY
The Manager, Operations and Financial Analysis directs the day-to-day operational management for the Beedie School of Business Burnaby Campus. Provides financial advice, analysis, forecasting, budgeting, and transaction processing for salary and operating budgets. Drafts and implements financial and administrative policies and procedures for Beedie’s faculty and staff based on interpretation of SFU policies and workflow requirements.

DUTIES AND RESPONSIBILITIES
Directs the day-to-day operational management for the Beedie School of Business (Beedie) Burnaby Campus. Serves as a central resource for all Beedie departments in the areas of facilities management; renovations; procurement; teaching instructor support; timesheet processing; and administrative human resource support. Develops and implements administrative procedures for current and new initiatives.

Establishes and oversees processes for daily operational services including the maintenance of facilities; liaises with relevant SFU departments, external service providers and/or contractors, and Beedie senior administrators and administrative staff; oversees the processing of maintenance requests; and provides training to Beedie staff as required. Oversees the streamlining and standardization of office procedures and authorization processes for office equipment and supplies, room booking and catering (MECS), document shredding, office keys/access cards, etc.

Acts as the building renovations project manager by:
- Liaising with Facilities Services and stakeholders to consider requests.
- Recommending renovation plans.
- Reviewing drawings.
- Establishing budgets.
- Seeking appropriate approval from stakeholders and coordinating processes on behalf of Beedie.

Oversees and manages remediation projects (e.g., long term West Mall Complex mold issue) by:
- Working with Facilities Services to coordinate site visits and storage of furniture and office equipment.
- Arranging for temporary office space, telephones, internet access, etc.

Manages the School’s space portfolio by:
- Analyzing space requests/requirements and planning for growth.
- Advising senior administrators on Faculty-wide space allocation policies and procedures.
- Planning office, meeting, and work spaces for faculty, staff, and campus visitors.

Researches and procures furniture and equipment (computers, telephones, audio visual, etc.) for all offices and shared spaces (i.e., meeting rooms, lunch rooms, student lounges, etc.). Ensures all spaces are equipped based on Faculty standards. Responds to special requests for ergonomically specific equipment.

Works with all Beedie departments to establish standardized processes to ensure that all documents/records are managed according to the University’s records management policies, procedures, and standards. Maintains records retention schedule for financial documents, Teaching Assistant and Course Instructor Evaluations, Teaching Assistant personnel files and final exam disposal. Acts as an advisor to other Beedie departments.

Responsible for the completion and submission of University reports (e.g., Instructor Activity Analysis, Space Entitlement Report for Institutional Research and Planning, etc.).

Provides financial analysis/reporting, program costing, and management of financial transactions processing. Oversees monthly FAST reconciliations for all salary and operating budgets. Oversees invoicing and collection of accounts receivable relating to Meeting, Event and Conference Services (MECS) transactions on behalf of Beedie partners. Follows up and resolves Payroll and Accounts Payable discrepancies and errors as required.
Works collaboratively with the Manager, Budget and Financial Analysis, and other Beedie administrators to assist with forecasts and budget submissions; prepares spreadsheets; analyzes data; provides advice; and manages data entry for the budget submission. Develops and implements customized instructions for processing transactions and trains staff. Reconciles financial accounts and provides interim updates and final reports to Program Directors.

Establishes and manages procurement procedures for Beedie by assisting faculty and staff with all purchasing needs and ensuring the University Procurement policies are followed. Oversees procurement processes involving MECS and Document Solutions. Oversees supplier selection and the negotiation of rates for review with Procurement Services. Manages all Beedie staff commercial/credit cards by authorizing set up; training users; reviewing transactions and monthly reconciliations; and following up on discrepancies and inappropriate usage.

Works with senior administrators to prepare supporting documents for processing various forms and Service Agreements. Works with Payroll to reconcile payments and Procurement Services to analyze encumbrances.

Drafts and implements financial and administrative policies and procedures for Beedie’s faculty and staff based on interpretation of SFU policies and workflow requirements. Develops teaching materials; trains staff; and checks/reviews work to improve workflow within the School and within SFU (e.g., flow of invoices, salary/payroll set up documentation, and processing of travel expense claims, etc.).

Works with the Teaching, Research & Collaboration System (TRACS) staff to improve the automation of procedures. Oversees TRACS users to ensure that staff are properly trained to maintain accurate data on a timely basis.

Provides financial support, cost analysis, and budget advice for projects, Academic programs, and activities. Projects include: accreditation visits, new academic programs, student/research incubators, equipment upgrades, existing program reviews, faculty managed conferences, guest speaker events, sponsorship agreements, funded student internships, use of Dean’s Strategic Priorities Fund, and student international trips.

Oversees, manages, and provides advice and back-up for Beedie payroll and timesheet processing (e.g., time recording for labour action, long term sick leave). Monitors TSSU/SFUFA payroll during labour action (e.g., point person for wage adjustments). Processes work study documentation and timesheets for students.

Reviews annual vacation entitlement for all Beedie employees and follows up with supervisors to ensure that vacation is used during the period earned.

Responds to confidential requests for information and analysis from the Dean and other senior administrators.

Provides administrative support to all part time instructors (e.g., visiting faculty, sessional instructors) for the dissemination of instructional information and resources required for their initial appointments and to assist with their ongoing teaching duties. Support is customized to meet the needs of Beedie at all three campuses (e.g., policies and procedures regarding keys, access cards, office assignments, office supplies, general policies and procedures).

Oversees and manages the Course Instructor and Teaching Assistant evaluation process for the Beedie School of Business. Results and analysis are provided to Beedie’s senior administrators to assist with hiring decisions, salary review and tenure/promotion cases.

Works collaboratively with other staff to manage and provide advice on Teaching Assistant (TA) appointments. Responsible for managing TA Payroll appointment documentation and following up on discrepancies.

Oversees and manages mid-term and final exam requirements for faculty by overseeing examination editing and duplicating/Scantron services through SFU Document Solutions.

Assigns workspace, provides internet/library access and computing id’s to all campus visitors (e.g., guest speakers, visiting scholars, and post-doctoral fellows). Assists with the completion and timely submission of non-employee expense claims as required.

Provides advice to other Beedie managers on staff recruitment, interviewing, etc. Participates on recruitment committees and evaluates the suitability of candidates. Provides administrative support for the collective agreement and/or appropriate policies and procedures.

Initial Effective Date: July 19, 2017
Latest Revision Date:  
Assists with Return to Work and Disability/Sick Leave management issues in consultation with Beedie administrators and the SFU Human Resources department. Assists with incident reporting and Workers’ Compensation claims, in consultation with Environmental Health and Safety personnel. Acts as the Beedie representative responsible for emergency and continuity planning.

**IMPACT OF DECISION MAKING**

Decisions impact the School’s operations, programs, and initiatives. Analysis and recommendations provided to Beedie’s senior administrators impact hiring decisions, salary review and tenure/promotion cases.

The Manager, Operations and Financial Analysis is responsible for:

- directing the day-to-day operational management activities; and suggesting and implementing solutions.
- providing financial advice and support for existing programs and new initiatives.
- drafting and interpreting SFU and Beedie financial and administrative policies.
- drafting new financial and administrative policies and procedures and making recommendations for the improvement of operational efficiency.
- providing advice to managers on personnel management activities including staff recruitment, interviewing, etc.
- developing appropriate procedures for the management of building maintenance and monitoring of expenditures.

**RELATIONSHIPS**

Establishes and maintains relationships and alliances. Maintains effective communication. Shares information and readily determines to whom to go for relevant information. Seeks assistance and feedback in the problem solving process. Partners with others to achieve expectations.

**Supervisory**

Supervises up to five direct reports.

Supervises staff by providing guidance and mentorship, ensuring the appropriateness and currency of job responsibilities, initiating recruitment for temporary and continuing staff, hiring staff, providing or directing the provision of training, evaluating performance, approving leaves and training and development, responding to grievances and approving leaves of absence.

**Primary Working Relationships**

**Internal/External Connections** - works with employees, external consultants, and Environmental Health and Safety personnel. Works closely with program directors, faculty and staff. Provides professional advice, guidance and consultation to staff and as a member of the senior management team. Represents Beedie on SFU ad hoc financial committees and working groups by providing financial and operational information and advice.

**QUALIFICATIONS**

Bachelor’s degree in Commerce or Business Administration and a professional accounting designation (e.g., CPA) and five years of related experience including experience in financial and human resource management, facilities management, and project management, or an equivalent combination of education, training, and experience.

Excellent knowledge of financial concepts, theory, standards and practice.
Good knowledge of facilities management.
Proficient in the use of spreadsheet, database, and enterprise level financial applications.
Excellent interpersonal and communication (verbal and written) skills.
Excellent organizational, quantitative, analytical reasoning, problem solving and research skills.
Ability to write procedures and to train staff.
Ability to comprehend, analyze, interpret and develop policies and procedures.
Ability to demonstrate diplomacy and to handle confidential and sensitive situations with discretion.
Ability to provide consultative advice and collaborate with managers and staff, and other members of the university community.
Ability to maintain excellent attention to detail.
Ability to exercise initiative and to meet strict deadlines.

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