The Senior Financial Analyst leads in the design and development of sound budgetary processes and financial models across the university. The Senior Financial Analyst is responsible for monitoring financial activities, identifying emerging trends and issues, and providing a senior level of professional advice, consultation, analysis and problem resolution to university faculty and staff in support of budget planning.

DUTIES AND RESPONSIBILITIES

1. Designs, implements and maintains complex financial models by:
   - developing large and highly complex multi-year financial projections using scenarios, key drivers, trend and other analytical indicators to maintain dynamic and relevant models such as tuition projections, compensation models, capital financing and operating budget models.
   - monitoring the financial implications of multi-dimensional situations to identify issues, opportunities, options and make recommendations such as consolidated fiscal year-end projections and Ministry forecast.

2. Monitors financial impacts at a fund and/or consolidated level by:
   - analyzing financial activities at various levels using a variety of enterprise-wide administration systems with complex data structures in order to pro-actively identify emerging trends, issues, or opportunities, such as financing of strategic priorities and cost savings opportunities.
   - designing, developing and preparing internal and external financial reports to a range of audiences including the Board of Governors. Reports must be designed to comply with Generally Accepted Accounting Principles, PSAB, and with Canadian Association of University Business Officer account guidelines, as appropriate.

3. Provides leadership on various financial and budget planning activities by:
   - assuming responsibility for various analytical, project and process-related activities, such as quarterly ministry forecast reporting, tuition fee processes and projections, compensation and operating grant modeling and reconciliations, the evaluation and implementation of systems and tools, as required.
   - providing advice and expertise in the development of university-wide policies and procedures.
   - guiding the planning of the annual or a segmented portion of the budget cycle.
   - collaborating with the Director to develop strategic plans for the overall budget department, and developing tactical plans to implement changes to budget requirements across the university.

4. Provides a senior level of professional advice, consultation, analysis and problem resolution by:
   - investigating, analyzing, recommending and implementing resolutions involving complex financial issues.
   - collaborating with Associate Vice-Presidents, Deans, Directors and other financial staff to support best budget management practices and developing resolutions on both local and university-wide budget matters.
   - advising, training and consulting on the effective use of budget and financial systems, financial implications of administrative budget policies, procedures and practices across all funds.
   - ensuring university-wide adherence to university policies on financial management, collective agreements, employment policies and relevant legislation.

IMPACT OF DECISION MAKING

The Senior Financial Analyst is responsible for:
   - decisions regarding the tactical implementation of new budget initiatives, administrative budget policies, procedures and practices.
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- decisions regarding assumptions and estimates for the annual budget and projections for the Deans, Directors and Vice Presidents, costing models, and analysis of revenue.
- decisions regarding reporting classifications and interpretations involving a large financial magnitude.
- decisions regarding judgment and advice provided to the Deans and Directors with respect to financial information and process design.

RELATIONSHIPS

Establishes and maintains relationships and alliances. Maintains effective communications. 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 temporary staff as required.

Primary Working Relationships
Works closely with the Director, Budgets, Manager, Budget Operations, Budget Analysts, and IT Services, Faculty Directors of Administration and other Budget Managers across the University.

QUALIFICATIONS

Bachelor’s degree in Business Administration or Commerce with a professional accounting designation (e.g. CPA) and seven years of related experience in budgeting, or an equivalent combination of education, training and experience.
Excellent knowledge of the design and development of financial models for projecting key revenues and expenses and conducting analyses.
Excellent knowledge of policies governing budget and financial management and Canadian Public Sector Accounting Standards.
Excellent organizational and time-management skills
Excellent analytical reasoning, critical thinking and problem-solving skills
Excellent interpersonal and communication skills
Ability to analyze business requirements, identify criteria and specifications, conduct tests, troubleshoot issues and interface with user groups.
Proficient in creating complex queries and reports using a variety of tools, such as PSoft Query, nVision, SmartView and other reporting tools.
Proficient in the use of spreadsheet, database, and enterprise-level information systems (e.g., PeopleSoft, Hyperion Planning).

Initial Effective Date: July 4, 2017
Latest Revision Date: September 21, 2017