SIMON FRASER UNIVERSITY
ADMINISTRATIVE & PROFESSIONAL
JOB DESCRIPTION

Position Title: Associate, Proposal Budget Development
Position #: 00122291
Department: VPR Major Projects Office
Reports to: Director, Major Projects Office
Reports to (pos #): 00113130
Employee Group: APSA
Grade: 10

POSITION SUMMARY

The Associate, Proposal Budget Development is responsible for driving the budget development life-cycle from funding requirements identification, through budget preparation and submission. The Associate facilitates and develops complex proposal budgets for the pre-award, pre-approval and post-award administration of major institutional and/or collaborative research proposals involving University commitments and multi-institutional and/or private sector partnerships.

DUTIES AND RESPONSIBILITIES

Facilitates and develops complex proposal budgets for the pre-award, pre-approval and post-award administration of major institutional and/or collaborative research proposals involving University commitments and multi-institutional and/or private sector partnerships by:

- Preparing accurate and appropriately resourced budgets which meet Principal Investigator (PI) needs and funding agency requirements.
- Providing recommendations to faculty members/PIs and working in collaboration with other researchers, staff from Facilities Management and Purchasing/Procurement, Deans, and Chairs/Directors.
- Advising on all budgetary matters including budget strategy and development, ensuring proposals adhere to all grant application regulations and requirements, and follow funding agency and University guidelines.
- Applying a thorough understanding of funding agency requirements and acting as the liaison between faculty, suppliers and the agency to ensure that complex projects can be expedited.
- Reviewing eligibility and in-kind evaluation; searching for specialized equipment; educating vendors regarding unique policies and requirements; and identifying sources of matching funding.
- Assisting the Supervisor with the development of grant applications through close collaboration with Grants Facilitators and faculty.
- Liaising with other universities, institutes, funding agencies and foundations to develop the financial components of major projects.

Provides assistance to faculty members, staff, and administration with navigating the post-award claims process for major awards and contracts by:

- Working with faculty, collaborators, funders and providers to finalize project budgets.
- Preparing and submitting funding confirmation packages and all financial reports to funding agencies.
- Communicating with funders to solve problems arising from shortfalls in matching funds or other funding issues.
- Working with legal counsel to draft Inter-Institutional Agreements, Memoranda of Understanding, and other contracts on a case-by-case basis.
- Assisting Project Leaders and PIs with request for quotes (RFQ) and request for proposals (RFP).
- Coordinating with the Project Accountant in Research Accounting to ensure continuity of the financial process.
- Overseeing the management of project scope, schedule, and budget, across the project lifecycle.
- Developing and maintaining a productive working relationship with institutional and multi-institutional project teams, partner organizations, and vendors.
- Assessing variances from the project plans, budgets, and schedules; developing and implementing changes as necessary to ensure that the project remains within specified scope and is within time and cost.

Manages the Infrastructure Operating Fund (IOF) Claim process by:

- Developing SFU’s CFI IOF project budgets, consistent with CFI regulations and SFU’s Institutional Allocation Plan through discussions with Project Leaders and other researchers.
- Setting up complementary operating fund accounts for CFI infrastructure projects.
- Preparing annual requests to CFI for the release of operating funds.
IMPACT OF DECISION MAKING

Makes decisions regarding: development of pre-award, pre-approval and post-award processes; budget timing/forecasting; financial reporting to funding agencies; determination of information for entry on the proposal side and CFI side of the Grant Tracking System.

RELATIONSHIPS

Establishes and maintains relationships with peers and contacts with access to information and to key business partners. Shares information and advice on how to get things done and who to involve.

Supervisory
Direct Reports: 0

Primary Working Relationships

Internal/External Connections – Works closely with Deans, Associate Deans, program directors, faculty and staff. Liaises and works with researchers and administrators at SFU and other Universities, research institutions, industry, and funding agencies and foundations, to develop the financial components of grant applications.

QUALIFICATIONS

Bachelor’s degree in Science or Applied Sciences and five years directly related experience in budget development; account management; research project management; developing and writing successful research papers, grants, and/or contracts, or the equivalent combination of education, training, and experience.

Excellent knowledge of research grant preparation, funding agency requirements, budgeting, and expenditure control. Excellent knowledge of tendering processes, the AIT, and provincial and federal granting agency finances. Excellent knowledge of CFI, BCKDF, WD, and funding agency pre and post award finances. Excellent mathematical skills and the ability to apply basic concepts of accounting and finance. Excellent organizational, analytical, and time-management skills. Excellent interpersonal and communication skills (verbal and written). Ability to work with a diverse academic community with a wide range of partners across all sectors. Ability to take initiative, multitask, and work well under pressure with a large volume of work and strict deadlines. Proficiency with Word, Excel, internet communications, and internet e-submission process for academic research proposal development.