The Financial Analyst manages the annual budget planning process and internal/external financial reporting; and the operating and specific purpose budgets and funds within the portfolio and office of the Executive Director, Research Operations (EDRO). The Financial Analyst provides financial administrative advice, consultation, assistance, and problem solving to the unit Directors reporting to the EDRO and supports the development and claims process for major institutional infrastructure awards.

DUTIES AND RESPONSIBILITIES

1. Ensures sound financial management of complex proposals and projects in the Major Projects Office by:
   - Providing financial administrative advice, consultation, assistance, and problem solving for the development and claims process for major institutional infrastructure awards.
   - Applying a detailed knowledge of CFI, WED, and other infrastructure agencies with highly complex financial reporting requirements.
   - Acting as a point of contact with Research Accounting on the management of complex budgets.

2. Facilitates ongoing financial analysis and administration of annual operating budgets, specific purpose budgets, research grants and contracts that support the overall VPR mission, by:
   - Preparing all financial forecasts and budgets for the EDRO units.
   - Establishing and coordinating the (approximately $3.5M) Research Operations Budget preparation workflow, timeline, and procedures.
   - Providing financial administrative advice and assistance to the Supervisor regarding the budget submission.
   - Managing the operating, and specific purpose funds for the Office and units of the EDRO.
   - Analyzing and preparing cost projections; administering expenditures; initiating and approving budget transfers, journal vouchers, purchase requisitions, travel and business expense claims, and work orders, etc.
   - Reviewing and reconciling expenditures to monthly commitment reports and liaising with Financial Services to resolve discrepancies.
   - Maintaining accounting records; and preparing periodic status reports.
   - Providing financial management and support for the federal government and federal granting councils audit process; ensuring adherence to standard accounting practices and compliance with University policies and procedures.
   - Overseeing account reconciliations and ensuring that accounting discrepancies have been resolved appropriately.

3. Provides financial administrative advice, consultation, assistance, and problem solving to the various unit Directors (Office of Research Ethics, Office of Research Services, Industry Engagement, 4D Labs, ImageTech Lab) regarding the financial implications of their unit budgets by:
   - Consulting with staff in the Finance Budget Office, Accounting, and Research Accounting.
   - Providing guidance in the application of University and external funder policies, procedures, and practices.

3. Provides financial administrative advice and support for complex research projects to Project Managers by:
   - Supporting the development and administration process for major institutional awards.
   - Applying a detailed knowledge of funding agencies with highly complex financial reporting requirements.
   - Acting as a point of contact with Research Accounting on the management of complex budgets.
   - Scale of activity: $20M-$40M per year.

IMPACT OF DECISION MAKING

The Financial Analyst is responsible for:

- Recommendations relating to complex financial reports. Decisions could impact the viability of SFU major research initiatives and projects.
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.

Primary Working Relationships
- **Internal Connections** – works closely with the Associate, Proposal Budget Development in the MPO to develop and administer major awards/projects. Key liaison between Research Operations units (ORS, MPO, Industry Engagement) and Research Accounting. Works with Project Managers in RO as their financial specialist and advisor. Works with faculty directly, as required, on complex budgets and reporting. Collaborates with staff in the EDRO portfolio, the Finance Budget Office, Accounting, and Research Accounting.

- **External Connections** – Primary link is with major infrastructure grantors and companies related to major projects – at the financial level (with peers).

QUALIFICATIONS
Bachelor’s degree in Business Administration (Accounting major), with a professional accounting designation (CPA), and five years of related work experience, including experience in financial management within a corporate or university environment, or an equivalent combination of education, training, and experience.

- Excellent financial, budget management, accounting, and administrative skills.
- Excellent interpersonal and communication skills (verbal, written and presentation).
- Excellent organizational, analytical, and problem-solving skills.
- Ability to provide consultative advice and to collaborate with others.
- Ability to explain and apply policies.
- Ability to demonstrate tact and diplomacy.
- Ability to maintain strict confidentiality.
- Proficient in the use information technology applications specific to financial management and administration.