HUMAN RESOURCES  
SIMON FRASER UNIVERSITY  
TEMPORARY  
ADMINISTRATIVE & PROFESSIONAL  
JOB DESCRIPTION

Position Number: 00122730

A. IDENTIFICATION

Position Title: Budget Coordinator
Department: Dean’s Office, Faculty of Communication, Art and Technology
Position Reports To (Title): Dean, Faculty of Communication, Art and Technology
Date: November 17, 2017

B. POSITION SUMMARY

Under the direction of the Director, Financial and Resource Planning, the Budget Coordinator provides day-to-day management of the Dean’s Office operating, specific purpose, research, grant-funded, and endowment funds. The incumbent works closely with departmental managers and provides advice on financial and budget procedural issues. The Budget Coordinator collaborates with the Supervisor in the development of budgetary policies and procedures in order to maintain an integrated financial system for the Centre. The incumbent of the position coordinates the compilation, analysis, and reporting of statistical and survey data.

C. DUTIES AND RESPONSIBILITIES

Financial Management 65%

- Under the direction of the Director, Financial and Resource Planning, provides the day-to-day management of the Dean’s Office operating, specific purpose, research, grant-funded, and endowment funds. Works closely with school managers and provides advice on financial and budget procedural issues.

- Works under the direction of the Director on the financial management of various projects within the Faculty.

- Directs and oversees the management of department account records and budgets for the operating, specific purpose, research, grant-funded, and endowment funds.

- Collaborates with the Director in the development of budgetary policies. Develops and implements procedures in order to maintain an integrated financial system.

- Develops, keeps current, and oversees maintenance of an integrated financial information system to ensure compliance with Faculty and University policies and the secure and accurate collection, disbursement and reconciliation of all funds.
• Liaises with Financial Services, Research Accounting, academic departments and external agencies regarding the interpretation of financial policies and applicable procedures. Coordinates audits. Communicates new and revised policies and procedures to staff.

• Designs and maintains a wide variety of reports (e.g., year-to-date positions, year-end forecasts, variance), by assessing needs and determining specific data that is required to monitor fund expenditures.

• Administers contracts and related procedures for independent contractors, and various project and other temporary staff including the preparation and issue of ICAs, AFSs, and FPP4s; managing invoices and payments; and coordinating with internal SFU units (e.g., Procurement, Financial Services, Research Services Accounting).

• Analyzes and oversees the reconciliation of monthly Departmental Summary and Transaction Detail Reports for various Faculty accounts. Verifies financial paperwork, financial commitments and recoveries. Ensures all charges adhere to existing policies. Initiates research into any departmental financial transactions that seem questionable and resolves discrepancies when appropriate.

• Manages closing of fiscal year-end books and prepares fiscal year end reconciliations as required. Ensures all accounts meet audit standards, including records retention.

• Oversees the department petty cash and float funds and oversees disbursement, and balancing.

• Provides financial management services for annual general meetings, conferences, workshops, and other special events.

**Budget Development**
15%

• Participates in the development and preparation of annual Faculty operating, specific purpose, and research budgets. Tracks expenditures and drafts budget forecasts for review.

• Reviews and updates salary, non-salary expenses and revenues; prepares preliminary budgets for review by the Director; ensures budgets are entered into budget system and reviews for accuracy.

• Requests new department, project, and endowment funds as required.

• Assists in the development, planning, and execution of the Faculty’s salary budget by reviewing turnover, salary fall out, new position and position re-evaluation requests etc.
Statistics 10%
- Coordinates compilation, analysis, and reporting of statistical and survey data for the purpose of generating reports and improving processes and services.
- Makes recommendations and improvements in collecting, counting and analyzing statistics.

D. DECISION MAKING
- Day-to-day management of operating, specific purpose, research, grant-funded, and endowment funds.
- Decisions regarding the development and implementation of financial and budgetary processes and procedures.
- Approval of department expenses within defined parameters, and consistent with University financial policies.
- Recommendations and advice to the Supervisor on significant budget and administrative matters, financial system requirements, and modifications.

E. SUPERVISION EXERCISED
Number of employees reporting directly to the position: 0
Total number of employees for whom the position has direct responsibility: 0

F. SUPERVISION RECEIVED
Works independently within the defined policies and procedures of the Faculty and the university. Complex, unusual or controversial issues are discussed with the supervisor and assistance is sought from the supervisor to review serious problems and/or issues falling outside established precedent, policies and procedures.

G. UNUSUAL WORKING CONDITIONS
Flexibility around regular work hours may be required on occasion to meet deadlines.

H. ENTRANCE QUALIFICATIONS
Undergraduate degree and three years of related experience including experience in budget management; or an equivalent combination of education, training, and experience
- Excellent knowledge of accounting procedures and principles.
- Proficient in the use of spreadsheet, invoicing and database applications.
- Excellent organizational, time management, analytical, and problem solving skills.
- Excellent interpersonal skills.
- Excellent communication skills (verbal and written).
- Ability to multi-task, set and accomplish goals independently, establish priorities, and meet deadlines.
- Ability to exercise mature judgment, diplomacy, and discretion.
- Ability to maintain confidentiality.