



Class No.:	
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## **DIRECTOR, FINANCIAL PLANNING**

### **NATURE AND SCOPE OF WORK**

The Director, Financial Planning provides leadership and strategic direction to the Financial Planning team within the Financial Services department. This position oversees the budgeting, forecasting of the operating, restricted and capital funds and the related reporting activities. The incumbent is accountable for accounting practices, associated policies and procedures, maintenance and ongoing development of the financial information systems and for adhering to all statutory and regulatory requirements. The position works collaboratively across the University to provide financial guidance and leadership. The Director also ensures the protection of the University's finances and assets by providing timely, meaningful, and accurate financial information.

### **ORGANIZATIONAL STRUCTURE:**

The Director, Financial Planning reports directly to the Vice President, Finance and Administration and works in partnership with the Director, Financial Operations on providing leadership and management of the Financial Services Department. Reporting directly into this role are the Manager, Capital and Restricted Funds and Manager, Financial Planning and Analysis. The Director participates as a staff resource to the Committees of the Board of Governors and University Foundation

### **SPECIFIC ACCOUNTABILITIES:**

#### **Financial Leadership:**

1. Maintains a high standard of financial integrity and ethical leadership to ensure the accuracy and timeliness of all financial reports, forecasts, analysis, and statements.
2. Oversees the development, implementation, adherence and maintenance of financial policies and procedures ensuring that the university meets Ministry directives, legislative and statutory requirements.
3. Establishes effective working relationships with internal and external constituents and collaborates with leadership across the university to provide advice and guidance on financial



management practices and processes that meet the university's strategies, goals and objectives.

### Financial Planning Operations

1. Provides strategic direction and oversight to the financial planning operations of the department ensuring efficient, effective, accurate analysis of budget, forecast and actual data.
2. Develops and implements approaches to support the connection of university's strategic plans to the effective allocation and monitoring of resources.
3. Leads the development, coordination and delivery of training to the University community on tools and processes with respect to financial policies, systems and operations to improve financial literacy and adherence to financial matters.
4. Prepares financial reports in compliance with internal and external reporting requirements.
5. Develops and assists management and departments with establishing key practices and other financial tools that align the overall university reporting, systems and operational processes
6. Leads and coordinates system implementations, upgrades and process improvements for the accounting functions.
7. Interacts with personnel from other universities, the Ministry and outside consultants on the development of financial, budget and funding issue

### People and talent:

1. Supervises and provides leadership to staff by coaching, guiding and modeling key behaviours, encouraging dialogue and providing guidance and advice to facilitate resolutions to work issues. Initiates and participates in the development, promotion, discipline and termination of department staff according to established University policies and consistent with collective agreement provisions.
2. Assists team members to define shared and individual goals, meet target dates and ensure alignment of team goals. Provides effective leadership and direction by establishing priorities and objectives and fostering effective teamwork among team members. Fosters an environment of collaboration and a strong customer service culture. Inspires, motivates and guides team members by fostering commitment, team spirit and trust.
3. Contributes to effective employee and labour relations by administering the collective agreement(s), representing management in the grievance process and consulting with Human Resources Services regarding collective agreement interpretation, as appropriate. Provides input to management negotiating team for collective bargaining



purposes, as needed.

### **QUALIFICATIONS:**

1. Bachelor's degree, plus completion of a recognized professional accounting designation.
2. Minimum 7 years progressively senior experience in general accounting, systems, payroll operations, experience in the post-secondary education system, in a unionized environment and with auditing is considered an asset.
3. Minimum of 3-5 years in a leadership capacity. Consideration will be given to candidates with an equivalent combination of education and work experience.
4. Demonstrated ability of effective team management and implementing change, resulting in improvements to service quality, staff productivity and systems efficiency.
5. Advanced knowledge of accounting procedures and financial reporting practices.
6. Experience in developing and maintaining systems in a computerized, decentralized environment.
7. Strength in establishing and maintaining effective working relationships with employees at all levels.
8. Strong interpersonal, supervisory and communication skills, both written and verbal with a strong focus on customer service.
9. Proven ability to exercise tact and diplomacy, confidentiality, and conflict resolution skills.
10. Strong computer skills, proficiency with spreadsheet programs, and demonstrated ability to use various financial software packages and databases to perform financial analyses and develop reports.