



## JOB DESCRIPTION

*We at Kwantlen Polytechnic University respectfully acknowledge that we live, work and study in a region that overlaps with the unceded traditional and ancestral First Nations territories of the Musqueam, Katzie, Semiahmoo, Tsawwassen, Qayqayt, and Kwikwetlem, and with the lands of the Kwantlen First Nation, which gifted its name to this university.*

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**POSITION TITLE:** Manager, Financial Reporting

**DEPARTMENT:** Financial Planning and Reporting

**DIVISION:** Financial Services

**DATE CREATED:** August 2017

**DATE REVISED:** September 2024

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### ORGANIZATIONAL STRUCTURE

The Manager, Financial Reporting reports to the Director, Financial Services (Reporting and Budgeting) and manages a staff of Accountants, Accounting Analysts and Financial Reporting Coordinators performing financial administration of Special Purpose Funds, Research Funds, Revenue Generating Funds, Ancillary Funds and institutional financial reporting requirements on behalf of the KPU and KPUF.

### PRIMARY FUNCTION

The Manager, Financial Reporting is responsible for or provides support to management and coordination over institutional reporting and the effective operation of financial reporting and systems functions for both Kwantlen Polytechnic University (KPU) and Kwantlen Polytechnic University Foundation (KPUF). In addition, the position is responsible for the efficient and effective financial administration of the Special Purpose Funds, Research Funds, Revenue Generating Funds, and Ancillary Funds. This position provides services to our internal and external key parties. These services include the effective operation and testing of systems, and training within the portfolio and as required across other areas of the University in accordance with KPU policies, collective agreements and statutory requirements.

### KEY RESPONSIBILITIES

#### People First/Leadership

1. Supervises and provides leadership to direct reports by coaching and modeling key behaviours/strategies, encouraging dialogue and providing guidance and advice to facilitate resolutions to work issues. Assists team members to define shared and individual goals, meet target dates and ensure alignment of team goals. Monitors and assesses performance.
2. 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.

Financial Reporting:

1. Manage the Financial Reporting department which includes staff performing financial administration of Special Purpose Funds, Research Funds, Revenue Generating Funds, Ancillary Funds and institutional financial reporting requirement on behalf of the KPU and KPUF.
2. Ensure that university reporting conforms to overall institutional financial administration and reporting requirements and are in compliance with Public Sector Accounting Standards and other reporting requirements as applicable and completed in a timely and accurate manner.
3. Directing and ensuring proper processes, procedures and systems are developed, implemented and maintained to ensure effective and efficient reporting requirements are met and are compatible with and enhance the overall institutional reporting and financial administration requirements.
4. Manage, coordinate, prepare and/or review and remit statutory financial reports (e.g. charity and gaming returns, etc.) and institutional financial reports required by internal and external bodies for the University including the University's annual audited financial statements and quarterly government reports.
5. Manage and coordinate the fiscal year end activities and year-end financial audit for the University, including the preparation of working papers, financial statements, schedules, notes and reconciliations.
6. Working closely with the Director, Financial Services (Reporting and Budgeting) in the development of strategic financial reporting, systems and operations, the resolution of complex reporting, systems, taxation, banking relationships and procedures, student receivables, monitoring the overall financial operation, cash management of the University as well as other financial matters.
7. Maintain the data integrity of financial information in the University's integrated financial systems.
8. Provide recommendations, assistance, guidance and information, where necessary, to University managers and other employees on financial reporting, general accounting and taxation matters.
9. Provide training to the University community on tools and processes with respect to financial administration and financial reporting.
10. Developing and assisting university management and departments with establishing key practices and other financial tools that align the overall University reporting, systems and operational processes that meet the University's strategies, goals and objectives.



11. Developing, implementing and maintaining reports to ensure University key parties receive accurate and timely financial information to enable them to fulfill their responsibilities.
12. Work in conjunction with other areas to develop processes and systems for all key parties that enhance the financial reporting and administration of this portfolio.
13. Routinely review financial procedures, systems, policies, statutory requirements and collective agreements to ensure continuous improvement, and to identify issues and/or concerns.
14. Ensure proper processes, procedures and systems are developed, implemented and maintained to ensure effective and efficient reporting requirements are met and are compatible with and enhance the overall institutional reporting and financial administration requirements.
15. Leading and coordinating process improvement initiatives for the reporting function.

#### Financial Administration of Special Purpose Funds, Research Funds, Revenue Generating Funds and Ancillary Funds

1. Prepare, provide and review financial and management reports, data and analysis to ensure accurate and timely financial information is provided to the University's internal and external key parties.
2. Provide assistance, information and direction to the University community on internal and external policies, procedures and regulations.
3. Liaise between units and external bodies on financial administration and/or issues.
4. Collaborate with other areas to develop processes and systems for all key parties that enhance financial administration. Lead and coordinate the routine review of financial procedures and systems, financial systems upgrades and initiatives to ensure continuous improvement.
5. Analyze and monitor financial progress and assess financial needs and provide financial advice and information to internal and external key parties.
6. Develop and implement new methods, processes, policies, procedures and controls in accordance with University and external agency policy and procedures to improve efficiencies, establish best practices and standardization within the University.

#### Systems, Ad Hoc Requests/Projects:

1. Assist in the development, implementation and maintenance of KPU and KPUF's Chart of Accounts which drives all financial reporting for both entities.
2. Responsible for the effective operation and use of integrated, automated systems including data integrity, internal controls, identification of detailed requirements for the



portfolio; and develop and implement specific improvement projects. Investigate and resolve anomalies as required.

3. Work in conjunction with other units to ensure financial data transferred to/from other systems is compatible, relevant, accurate, timely and complete.
4. Work in conjunction with other areas to develop and maintain data standards (e.g. JV's) used within the integrated system.
5. Organizes the collection, analysis and presentation of institutional data requested by government bodies and other relevant external agencies and in the training and supervision of staff within the unit.
6. Provides analysis and interpretation of a variety of information, making financial-related recommendations as required.
7. Designs, develops and manages, in consultation with other University divisions, information processes and databases to support financial research, reporting, planning, and accountability that meet internal and external requirements.
8. Designs and manages the creation of new and ad hoc financial information to KPU, the Provincial government and other external bodies, some of which may be sensitive or extremely confidential in nature.
9. Responds to specific internal and external financial requests as they arise, some of which may be sensitive or extremely confidential in nature.
10. In conjunction with other Financial Services managers, develops and administers departmental policies and procedures. Participates in the establishment and implementation of University policies and procedures.
11. Participates in internal teams and committees as required; liaises with provincial government organizations, other post-secondary institutions and professional organizations, as required.

#### Other

1. Assist with maintaining financial reporting systems to ensure the University's financial reporting meets government requirements.
2. Assist in the development of the department's strategic and operational plans.
3. Establishes a high personal standard of service and performance by actively participating in other duties as assigned, education seminars, training programs, etc.
4. Contributes to and promotes a safe, equitable, respectful, and inclusive work environment by adhering to University policies and procedures and completing mandatory training programs.



## QUALIFICATIONS

### EDUCATION & EXPERIENCE

- Completion of a CPA, CA professional accounting designation with demonstrated three years of audit experience;
- Demonstrated five years of management experience with an emphasis in accounting and financial reporting;
- A proven track record of effective leadership, team management and implementing change, resulting in improvements to service quality, staff productivity and systems efficiency;
- Experience in a unionized environment is desirable;
- Experience in the post-secondary education system is an asset;
- Or an equivalent combination of education, training and experience.

### KNOWLEDGE, SKILLS and ABILITIES

- Strong technical knowledge of Public Sector Accounting Standards.
- Demonstrated ability to establish and maintain effective working relationships with employees at all levels.
- Demonstrated interpersonal, supervisory and communication skills, both written and verbal.
- Demonstrated ability to work as part of a management team.
- Proven ability to exercise tact and diplomacy, confidentiality, and conflict resolution skills.
- Have an understanding of, and respect for, the diverse values and culture of a university environment.
- Ability to travel between campuses is required.

### COMPETENCIES

- **Leadership:** KPU employees inspire, coach, mentor, and support students, employees and KPU as a whole in achieving objectives.
- **Accountability:** KPU employees demonstrate fiscal accountability and take ownership for their actions, decisions and results.
- **Continuous Improvement:** KPU employees take a creative approach to opportunities, exploring unique ways to create optimal value for the KPU community.
- **Collaboration:** KPU employees work in functional and cross-functional teams, coming together to solve complex issues and accomplish objectives that will benefit the KPU community.