



## 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, Budgeting and Planning

**DEPARTMENT:** Financial Planning and Reporting

**DATE CREATED:** May 2016

**DIVISION/FACULTY:** Financial Services

**DATE REVISED:** October 2024

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### ORGANIZATIONAL STRUCTURE

This role reports to the Director, Financial Services (Budget and Reporting). Reporting directly to this position are Accountants and Accounting Analysts.

### PRIMARY FUNCTION

The Manager, Budgeting and Planning is responsible for managing budget, financial planning, forecasting and budget reporting matters in accordance with KPU policies, collective agreements and statutory requirements. This position provides guidance to all units on campus in the development of their budgets and management of their financial resources.

### KEY RESPONSIBILITIES

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.
3. Develops the University annual consolidated budget and multi-year forecasts and projections for the University Board of Governors, the Ministry and to meet other statutory reporting requirements in consultation with the Director, Financial Services (Budget and Reporting) and the AVP, Finance.
4. Coordinates, communicates and oversees the annual budget planning process and guidelines for the University.
5. Provides guidance and support in the development of operational and project/program budgets and business plans for University units and departments.



6. Develops and implements new methods, policies and procedures to improve efficiencies, establish best practices and standardization for budgeting, financial management, and improved internal financial controls within the University.
7. Develops and prepares financial modeling to assess viability and impact of new projects, programs, and initiatives in conjunction with Faculties and other units.
8. Monitors and analyzes cash flow for forecasting and provides information for budgeting decisions made by management, responsible for quarterly forecast for submission to the provincial ministry.
9. Monitors ongoing operations to ensure they meet University and Provincial objectives and/or guidelines. Research and identify solutions for budgetary, funding and other financial matters.
10. Compares the actual operating results to approved and projected budgets for revenues and expenditures and provide budget variance reports to University managers and administration, the Board of Governors and other key parties.
11. Develops, implements, maintains and tests systems to collect, analyze, monitor and develop budget and financial data within the portfolio, in a decentralized environment.
12. Coordinates and/or provides training to the University community on tools and processes with respect to overall budget administration. Provides support in the development and assist university management and departments with establishing key performance indicators and other financial tools that align the budgeting process with strategies, goals and objectives.
13. Interacts and consults with personnel from other universities, the Ministry and external parties regarding budget and funding issues.
14. Monitors University financial performance and status and provide analysis and reports to Director, Financial Services (Budget and Reporting) and AVP, Finance to assist in strategic decision making.
15. Ensures that budget university reporting conforms to overall instructional financial administration and reporting requirements and are in compliance with generally accepted accounting principles and other reporting requirements as applicable and completed in a timely and accurate manner.
16. Manages, coordinates, prepares and/or reviews and remits statutory financial reports (e.g. quarterly institutional forecasts, capital cash flow forecasts, etc.) and institutional financial reports required by internal and external bodies for the University.
17. Manages and coordinates the fiscal year end budget activities for the University, including the preparation of working papers, budget reports and guidelines, schedules, notes and reconciliations.
18. Develops business case templates for overall university use to provide consistency of information and format when submitted for review of new opportunities or funding requests.
19. Assists units in the development of business cases in support of new program initiatives, capital investment plans and strategic partnerships that will provide the infrastructure necessary to support the university's growth objectives.



20. Develops and prepares financial modeling to assess viability and impact of new projects, programs, and initiatives in conjunction with Faculties and other units.
21. Hires, orients, evaluates, and develops staff in accordance with established University policies and collective agreement provisions. Provide training, training opportunities and guidance to staff to enable them to perform their job duties and stay current in their position.
22. Exercises payment authority on behalf of the University and related entities. Act as signing authority on behalf of the University in accordance with related policies.
23. Participates in the development of the department's strategic and operational plans.
24. Establishes a high personal standard of service and performance by actively participating in other duties as assigned, special projects, education seminars, training programs, etc.
25. Contributes to and promotes a safe, respectful, and inclusive work environment by adhering to University policies and procedures and completing mandatory training programs.

## **QUALIFICATIONS**

### **EDUCATION & EXPERIENCE**

- Completion of a recognized professional accounting designation;
- Minimum of five years' management experience as well as a proven track record of effective team management and implementing change, resulting in improvements to service quality, staff productivity and systems efficiency.
- Management experience in a unionized environment is preferred;
- Minimum of seven years' relevant experience, with four of those years coming post designation, in financial budgeting, program costing, budget modeling, reporting, administration and assurance, and working with integrated computerized systems;
- Experience in the post-secondary education system is preferred;
- Or an equivalent combination of education, training and experience.

### **KNOWLEDGE, SKILLS and ABILITIES**

- Experience in developing and maintaining systems in an integrated computerized, decentralized environment.
- 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.
- Excellent problem solving skills and the ability to identify and recommend creative solutions.
- Good organizational skills and a high degree of self-motivation and business acumen.
- Demonstrated commitment to personal and organizational excellence.
- 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.