

# **YUKON UNIVERSITY**

## **POSITION DESCRIPTION**

### **PART I - IDENTIFYING DATA**

**Position No:** YC1977

**Working Title:** Manager of Budgets

**Incumbent:**

**Division:** Administrative Services

**Headquarters:** Ayamdigut Campus

**Supervisor's Name:**

**Supervisor's Title:** Director Finance & Administration

**Description Completed:** October 2018 | **Updated:** April 2024

### **PART II - SUMMARY (Broad statement as to why position exists)**

Reporting to the Director of Finance & Administration, the Manager of Budgets manages the planning, development, and implementation of the University's budget and monitors it through periodic review. This position will also support University financial reporting and monitoring.

#### **A. Duties and Responsibilities**

**1. Major function - the single most important activity or responsibility required (describe what is done, why it is done, and how it is done):**

**A. Manages the planning, development, and implementation of the University's budget and monitors this budget through periodic review by:**

- Developing and communicating a plan for budget preparation, identifying key dates for project phases, decision-making, and final preparation.
- Providing support to the Financial Administration Committee.
- Calculating annual fringe benefit percentage.
- Meeting with program managers to support their budget planning and monitoring.
- Evaluating draft budgets against targets, program plans, and historical activity and Providing senior management with comments and analysis on viability and concerns.
- Compiling and assembling the institution-wide draft and final budget.
- Ensuring the final budget data is entered into the system and all program managers are notified of the final budget plans. Communicating budget milestones, expectations, processes, and outcomes to all budget holders.
- Reviewing, monitoring, analyzing, and reporting on individual program areas' financial reports; investigating and/or identifying potential funding concerns or unusual trends; and making recommendations to the program manager and/or Director to address issues.
- Prepare the institutional level financial reports (budget, variance, and forecast reports) regularly and oversee them for program areas.
- Consult with department managers to maintain accurate financial projections at all times.
- Every quarter (or as required), compile a forecast for fiscal year-end based on consultations with program managers.
- Training and assisting department managers and staff in applying budget management processes, budget planning, variance and forecast report preparation, and program expenditure control options.

**Approximate percentage of job time above functions are performed: 60%**

**B. Development and Supervision**

- orienting, training, and supervising Budget Officers.
- ensuring the budget team is resilient to staffing pressures by providing and encouraging cross-training opportunities.
- implementing activities that support long-term succession planning.
- **Approximate percentage of job time above functions are performed: 10%**

**C. Provides support for financial reporting and monitoring by:**

- Provide information for yearend audits such as financial statements and other reports.
- assisting with third-party revenue projects as needed.
- Design and automate FAST reports as needed.
- Developing and implementing standard training workshops for university staff on finance and budgeting processes.
- Creating costing/revenue models/projections for various projects, e.g., staffing levels, collective bargaining, etc.

**Approximate percentage of job time above functions are performed: 20%**

**2. Other Principal Activities, in order of importance (describing for each what, why, and how, and approximate percentage of job time required, rounded off to the nearest 5%):**

- Assist the Director in preparation for the Finance Audit and Risk Committee meetings.
- Assisting with other financial and operational matters as required by the Director.
- Assisting with projects within the finance and administrative area as needed.

**Approximate percentage of job time function is performed: 5%**

**3. Examples of Additional Divisional Activities which may be performed:**

- participating as a team member in division planning exercises.
- attending staff and committee meetings as directed.

**The approximate amount of job time function performed is 5%.**

**4. Approximately how long will it take for a fully qualified employee from outside the work unit to reach the full working level of the position:**

One year – full budget cycle

**B. Problem-solving and decision-making**

**1. a) List any acts, Regulations, and/or Policies/Procedures with which the incumbent must be fully familiar to perform the position's functions (e.g., Motor Vehicle Act, Business Corporations Act):**

- Yukon University's Policy/Procedure Manual
- Yukon University Collective Agreement – salary and benefit-related sections.
- Benefit costs for calculation of fringe rate.
- Yukon University Pension Plan (specifically contribution rates)

**b) Is the position responsible for interpreting, administering, or enforcing the above? If yes, explain.**

Yes, I interpret agreements and policies regarding budget development and the cost of salary and benefits.

**2. a) Describe the kinds of recommendations the incumbent is regularly required to make and to whom:**

- changes to budget management processes and procedures.
- recommendations concerning process improvements.

- recommendations concerning the cost of revenue projects or fringe benefits.

**b) Who normally makes the final decisions regarding those recommendations:**

Director of Finance and Administration and/or Chief Administrative Officer.

**3. a) Describe the kinds of final decisions regularly made for which the incumbent is held accountable:**

- ongoing day-to-day operational decisions and prioritization of the Budget unit.
- solutions to budget management, variance reporting, and/or problems within delegated authority.
- Departmental budget staff, deans, directors, managers, and supervisors received advice and support on budget management, variance reporting, and project costing.

**b) What is the direct impact of those decisions?**

Decisions and recommendations impact the efficient and effective budget management for university operations and activities and the accuracy of the financial reporting system.

**C. Freedom to Act**

**1. Describe how this position receives directions:**

The Director establishes goals and objectives. Once approved, the incumbent develops and recommends plans to achieve goals and objectives and is left to implement plans.

**2. What legislation, regulations, procedures, or established practices guide, constrain, or limit the activities of this position:**

See B.1 a) above.

**3. How is the work of the position normally checked?**

Through regular formal reviews with supervisors and feedback from university managers.

**4. What types of decisions are normally referred to the supervisor (give examples)?**

Budget input, expenditures exceeding delegated authority, and major modifications to existing budget management processes and procedures.

**D. Financial Accountability**

**1. Program Dimensions:**

**a) Annual Budget (for the unit under the direct control of the position):**

Fiscal Year	\$600,000
Annual Payroll	\$550,000
O&M Budget (excluding Payroll)	\$50,000
Capital Budget (excluding Payroll)	
Revenues	
Recoveries	

**Who prepares the budget?**

Manager of Budgets.

**What is this position's accountability for budget once allocated?**

Must manage and monitor the budget.

**b) Does this position have the authority/ability to reallocate resources?**

Yes.

**c) Signing authority levels: delegated spending authority (what section and for what amount)**

Up to \$5,000.

**2. Other expenditures or revenues influenced by this position and how:**

The effectiveness of the University budget/variance process impacts the university's revenue and expenditure patterns. The accuracy of financial reports has a direct impact on the university's financial decisions.

**E. Management Supervision of Human Resources**

1. No supervisory duties.

2. Supervisory duties.

a. Number of positions supervised directly: 4                      Permanent - 4  
Aux/Casual -

Number of positions supervised indirectly:                      Permanent -  
Aux/Casual -

**b. Nature of supervision: (check any of the following supervisory tasks that are to be performed regularly):**

- a) Show colleagues how to do tasks.
- b) Train other employees in work procedures
- c) Assign work and review for quality/quantity
- d) Establish work priorities and schedules.
- e) Change duties and responsibilities
- f) Formally appraise employees' work performance and discuss the appraisal with them, making a final recommendation to advance or withhold merit increments.
- g) Recommend appointment or rejection upon completion of the probationary period.
- h) Interview employees with attendance or performance problems
- i) act as the first formal step in the grievance procedure
- j) Interview candidates for vacant positions in the unit
- k) Give the supervisor the option to select new employees or make a final decision on the selection of new employees.
- l) other

**F. Key Personal Contacts**

<u>Who (what position or group)</u>	<u>Purpose</u>	<u>Frequency</u>
Supervisor	Exchange information, receive directions, discuss budget management process requirements, and resolve problems.	Daily
Departmental budget staff	To supervise, provide direction, and evaluate performance	Daily
University staff	To exchange information, provide services, and	Daily or as

	resolve problems	required
Auditors	To exchange information, provide explanations, and resolve problems	As required

**G. Tools, Equipment, or Machinery Used**

<u>Name</u>	<u>Purpose</u>	<u>What Percentage of Time?</u>
Computer	Preparation of documents, Banner and FAST input, scheduling, email, etc.	70%
Office equipment, i.e., phone, photocopier, etc.	Communications, copying, etc.	10%

**H. Working Conditions**

Describe any adverse conditions that are normal on the job.

a) Describe weights lifted:

<u>Type</u>	<u>How heavy</u>	<u>Percentage of time.</u>
N/A		

b) What working conditions (sitting, standing, bending, reaching) or types of physical effort (hiking, walking, driving) are required?

<u>Type</u>	<u>Percentage of time</u>
Standing	10%
Sitting	90%

c) Describe any physical hazards present:

<u>Type</u>	<u>Percentage of time</u>
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d) Describe special physical conditions leading to discomfort:

<u>Type</u>	<u>Percentage of time</u>
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e) **Interpersonal Conditions**

Check any of the following conditions which are expected in the job and give examples:

- high level of dissatisfied clients
- high level of emotional clients
- potential physical abuse from clients
- regular critical deadlines (financial and status reports)
- high level of irregular critical deadlines
- constant interruptions
- Instructions from more than one source
- other:

**f) Travel Required**

- a) average number of trips annually - 1
- b) average number of days per trip - 3
- c) average distance per trip - 3000 km.
- d) most frequent mode of transportation - air

**I. Organizational Chart**

- Complete the portion above the dashed line whether the position supervises.
- Complete the portion below the dashed line if this position supervises others.

**IMMEDIATE SUPERVISOR'S POSITION**

Title: Director of Finance and Administration Services

Classification Level: ME3

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**PEER POSITIONS: (all those reporting to the same immediate supervisor)**

Title: Manager of Finance

Classification Level: ME6

Title: Manager of Contracts & Risks

Classification Level: TBA

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**SUBJECT POSITION TITLE: Manager of Budgets**

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**SUBORDINATE POSITIONS:**

Title: Budget Officer (4)

Classification Level: ME8

**PART III - SIGNATURES**

**I confirm that this describes the duties and responsibilities I require of an incumbent in this position and have reviewed the description with the incumbent (where applicable).**

I have read the foregoing position description and understand that it is a general description of the duties and responsibilities assigned to my position.

\_\_\_\_\_  
Dean/Director or Designate

\_\_\_\_\_  
Incumbent

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**PART IV - QUALIFICATIONS**

To be completed by the Dean/Director or designate

**A. Minimum Knowledge, Skills, and Abilities Required**

- Thorough knowledge of generally accepted accounting principles and practices.
- Considerable experience in accounting, specifically budget management process development and costing of projects.
- Supervisory skills.
- Knowledge of business management, practices & procedures.
- Ability to set priorities.
- Effectively use complex computerized accounting systems (mainframe and personal computer), including remote access, and to work with financial reporting processes.
- Excellent proficiency with Excel Software.
- Ability to plan and organize work and make decisions per policies, guidelines, agreements, and regulations.
- Good oral and written communication skills.
- Strong interpersonal skills.
- Self-motivated individual, able to work independently.
- Ability to work under pressure & to meet critical deadlines.
- Cross-cultural sensitivity.

**B. Licenses, Certificates Required - Give the title and section of any legislation, regulations, or other authority where applicable.**

Diploma in Accounting or completion of second year towards an accounting designation (CPA and/or equivalent combination of education and experience.

**C. Other skills and/or knowledge that may be desirable but not necessarily essential to performing the position's duties.**

- Bachelor's degree in commerce/business
- Experience in a post-secondary environment.

**PART V – UNIVERSITY SIGNOFF**

Comments:

I approve this position description as representative of the work I require to be performed and that the responsibility levels identified have been delegated to this position.

.....  
Director, Human Resources Services

.....  
University President

Date: .....

Date: .....

**FOR HUMAN RESOURCE SERVICES USE ONLY:**

Evaluation Point Results:	
Knowledge and Skills:	184
Accountability:	61
Mental Demands:	53
Working Conditions:	0
 Total Points:	 298
Pay Level:	ME7