#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Operations Manager, School of Education

**Job Number:** X-376 | VIP: 1330

**Band:** EXEMPT-8

**Department:** School of Education and Professional Learning

**Supervisor Title:** Dean, School of Education

**Last Reviewed:**  August 24, 2023

#### **Job Purpose:**

Reporting to the Dean, School of Education, the Operations Manager, School of Education provides financial and administrative support to the Dean, School of Education. The Manager is responsible for providing strategic advice and support to the Dean of Education to develop budgets, monitor and provide direction on all School of Education financial matters, including staffing and expenditure projections, coordinating the financial activities and structures associated within the Trent School of Education, and implementing effective on-going processing of financial transactions. This position is also responsible for personnel matters, including confidential personnel support to the Dean of Education and the Program Manager, interpretation, and compliance with Collective Agreements, hiring processes, responsible for advising program Directors and Coordinators, including keeping them aware of important personnel matters requiring their attention, personnel data management across all (5) Education programs. This position oversees and supervises OPSEU administrative support staff within the School of Education.

#### Key Activities:

##### Financial Planning and Management

* Provides strategic advice and support to the Dean of Education to develop budgets, prepare annual budget defense, including staffing and expenditure projections.
* Provides strategic advice to the Dean of Education regarding resource allocation.
* Compiles and calculates TUFA & CUPE teaching support fund request. Administers funds, completes postings, hiring and monitoring of funds.
* Transfers and tracks all discretionary funds.
* Determines course fees and works with faculty for course resources. Determines whether the materials are appropriate, whether the costing is appropriate, provides advice to faculty, and approves of the expenditure or denies.
* Responsible for monitoring and tracking activity within the awards accounts to ensure accuracy, availability of funds for allocation and distribution, responsible for all budget forecasting.
* Analyzes M.Ed. student accounts when requested in consultation with finance and grad studies.
* Analyzes CTL budgets when requested, particularly related to forecasting and advising the dean.
* Provides support and training to staff relating to expense reimbursement, honorariums, and expense allocations for their specific course; Responsible for managing new software expense systems and policies.
* Transfers and tracks all discretionary funds for the dean, including endowments.
* Manages all student-funding endowments in the School of Education.
* Processes School of Education purchasing, payments, deposits, expenses and revenues in accordance with University and Purchasing/ Financial Policies and Procedures, including:
	+ Purchasing of goods and services through online purchase requisitions. Works with Purchasing on orders and discrepancies.
	+ Liaising with providers, negotiating costs, and all follow through.
	+ Tracking and reconciling expenditures for budgeting and monitoring purposes.
	+ Initiating transfer requests between operating accounts and other departmental transfers; follows-up on discrepancies and unpaid invoices as required.
	+ Reviewing and reconciling monthly statements for accuracy, including line by line updates. Resolves any discrepancies and undertakes transfers as needed.
	+ Receives and resolves payroll inquiries and issues.
	+ Manages instructional and operating budgets for all Education programs (government funded and alternate revenue stream funding) within the Responsibility Centred Management (RCM) system; monitors and reviews costing monthly to ensure programs stay within their budget.
	+ Manages, in consultation with the Dean of Education, all budgets associated with the School of Education, including analysis, implementation and monitoring of annual budgets. This includes:
		- Preparing monthly financial statements for Dean of Education.
		- Preparing quarterly and year end reports for Dean of Education.
		- Preparing year-end budget report.
		- Analyzing and reconciling all SOE budgets for accuracy and compliance to financial principles of the MOU and for purposes of audits.
		- Responsible for preparing requests for carry-forward monies.
		- Forecasting budgets and generating financial models for new programs.
		- Tracking and reporting on special projects (e.g. MTCU initiatives)

##### Human Resources and Personnel

* Initiates account requests/changes/cancellations for all employees hired under the School of Education (Trent email, network, Colleague, Long Distance Authorization codes, keys, business cards, photocopy cards, teleconference calls; creates, maintains and updates databases for tracking this information.)
* Creates, authorizes, and posts all postings for part time faculty positions (CUPE unit 1 & 2).
* Tracks and ensures all Right of First Refusals are completed, including database management, base letter preparation, and adherence to the Collective Agreement.
* Responsible for the preparation of TUFA and CUPE job postings and contracts.
* Hiring of all Academic Assistants, Workshop Leaders, CUPE 2 and hiring of all marking staff in consultation with the dean, the program manager and faculty.
* Responsible for preparing data in response to requests from Institutional Research, Human Resources, and the Provost office.
* Prepares TUFA salary letters, EYS letters, and ROFR letters in accordance with the respective Collective Agreements.
* Responsible for maintaining the official University record of faculty Earned Years of Service (EYS) for all School of Education faculty and prepares annual summary for the Dean.
* Prepares TUFA yearly salary increase spreadsheet for the Dean.
* Generates and maintains TUFA and CUPE teaching workload in database.
* Responsible for the TWSP requests, postings and hiring paperwork, tracks and reports to Financial Aid for reimbursement.
* Responsible for Marker/Grader requests, postings, offers and tracking.
* Responsible for accuracy and maintenance of faculty personnel files, as per the Collective Agreements and adherence to the Collective Agreements (TUFA, CUPE).
* Responsible for advising program Directors and Coordinators, including keeping them aware of important personnel matters requiring their attention.
* Confidential labour relations of TUFA and CUPE members.
* Approves and posts advertisements for all full-time faculty positions to ensure compliance with Canadian immigration regulations.
* Provide support and training to staff relating to hiring within the Collective agreements and Payroll requirements.

##### Administrative Support

* Preparation of audited enrolment, financial reports, School of Education faculty and staff data required by provincial and professional agencies [Ministry of Training Colleges and Universities (MTCU), Ontario College of Teachers (OCT), including those for accreditation.
* Administrative support to the Program Manager in regard to student timetable accommodations.
* Approve and track Associate teacher honorariums (700+)
* Track and report on Camp fYrefly expenditures. Work with the University of Alberta to reconcile payment.
* Track and report on M.Ed. International diploma course revenue/expenses e.g. WUXI summer students.
* Works closely with the Dean of Education, Program Manager, Director of Education Graduate program and the Coordinators of the Indigenous B.Ed. program, the Bachelor of Education program, and the Teacher Education Stream.
* Responsible for distributing and monitoring the Professional Expense Fund and issuing statements to faculty twice a year. Provide PEF savings and carry forward to Finance.
* Responsible for issuing T2200s.
* Responsible for VISA statement preparation and approval.
* Undertakes other duties as required by the Dean of Education.

##### Planning and Coordination

* Develops budgetary projections and prepares financial modeling for strategic planning initiatives.
* Assists with process of creating course timetable for SOE classes.
* Works with Office Manager to review space allocation in the SOE to ensure efficient room and office usage.
* Coordinates and administers School of Education award programs and endowments.
* Reviews and coordinates Donor agreements.
* Bookkeeping for the Trent Education Student Association.

##### Labour Relations

* Consults with managers, employees, and faculty to provide guidance and interpretation on Collective Agreements (TUFA, CUPE1 and CUPE 2).
* Provides strategic advice and data to support Human Resources during Collective Bargaining and grievance processes. Participate on bargaining committees as requested.

##### Office Management and Supervision

* Responsible for hiring, training, discipling, supervision, and performance appraisal of staff in the Office of The School of Education.
* Organizes and assigns regular duties and special projects, assists in the timely completion of job activities, and oversees the daily activity of the team.
* Responsible for setting formal and informal office policies and procedures, ensuring tasks are completed within timelines/ deadlines and in compliance with collective agreements and other university policies.
* Maintains positive office morale under stressful and heavy workload conditions.

#### Education Required:

* Master’s Degree preferably in Business with specialization in Human Resources or accounting.
* Demonstrated accounting related coursework or accounting designation.
* Advanced training and demonstrated experience with historical and current budgeting systems (RCM) is required.

#### Experience/Qualifications Required:

* Minimum 5 years of directly related experience, preferably in an academic environment, including unionized labour.
* At progressive experience in finance and budgeting.
* Advanced computer skills and experience including Word, PowerPoint, Access, Outlook, and Web CT. Database expertise an asset. High proficiency in Excel and data base applications including experience with (Colleague, IRIS, VIP, Automated expense system).
* Excellent interpersonal, verbal, and written skills with ability to interact well in a positive and professional manner, using tact and diplomacy.
* Demonstrated ability to take initiative, to use good judgment, to work independently with minimum supervision, and work as a team member in a complex and multi-faceted work environment.
* Experience with budgetary procedures, financial accounting, data manipulation and meticulous attention to numerical and contextual detail.
* Ability to preserve and maintain confidentiality.
* Ability to critically read and interpret data, policies, agreements and analyse transactions.
* Strong organizational and time management skills including decision making; Able to prioritize workload in an efficient manner and balance competing priorities.
* High level of attention to detail, accuracy, and confidentiality required.

#### Supervision:

* Provide training, guidance and direction, assigning and monitoring work for accuracy and completion and providing input into staffing decisions and performance evaluations.
* Direct Responsibility:
	+ Academic Administrative Assistant- School of Education
	+ Administrative Officer
	+ Education Administrative Assistant

**Job Evaluation Factors:**

##### Responsibility for the Work of Others

*Direct Responsibility*

*Academic Administrative Assistant- School of Education*

*Administrative Officer*

*Education Administrative Assistant*

##### Communication

##### *Internal*

##### *- Budget Services Manager – Payroll: Journal entries, accounts set up,*

##### *- Accounting services: Communication and meetings to discuss and determine the best processes with respect to policies and procedures*

##### *- Assistant Manager, Accounting Services: Journal Entries and monies transactions*

##### *- Restricted Fund Accountants: Journal Entries, deposits, account set up, account inquiries*

##### *- Research Accountants: Journal Entries, account set up, account inquiries*

##### *- Accounting Clerks: Wire transfers, account inquiries*

##### *- Supervisor, Accounting Operations: Course Fee Changes*

##### *- Accounts Payable: Account inquiries*

##### *- Student Accounts Representatives: deposits, course fees inquiries Purchasing Services Manager: policy and procedure alignment Buyer, Purchase Order and VISA inquiries*

##### *- Payroll Supervisor: Policy and Procedure alignment Payroll Clerk: Payroll inquiries*

##### *- Office of Research Director: authorization of receivable and payables,*

##### *- Advancement Office: Account set up and deposits*

##### *- Budget Managers: advise on policy and procedure, assist with budget preparation*

##### *- Faculty and Staff: advise on policy and procedures and complete and process honorarium forms, travel forms and expense reports and expense reimbursement*

##### *- Students: Payroll forms, honorarium forms, event assistance*

##### *External*

##### *- Businesses: travel, hotel, receive invoices, inquiries, assist with HST forms*

##### *- Other Post-Secondary institutions: who are collaborating with the School of Education*

##### *- FPHL Elders: Obtain information to complete honorarium and payroll forms*

##### *- Funding Agencies:*

##### *- Universities: other Departments who are collaborating with the School of Education*

##### *- Office and Equipment Supply Companies: questions about orders, placing all orders*

##### Motor/ Sensory Skills

*- Dexterity: operating a computer, running computer programs, filing*

*- Hand eye coordination- transferring data- small type on paper such as receipts etc to electronic documents*

*- Coordinated Movement: Multi-tasking such as data input and talking on telephone*

##### Effort

*This position is a mentally and physically demanding job that requires a singular concerted effort in high performance for short periods of time during monthly, year-end and funding application periods.*

*Mental*

*- This position is complex, requiring strong interpersonal skills combined with a very high degree of analytical reasoning.*

*- A high level of sustained concentration and clear thinking while processing a large volume of data in short periods of time is required.*

*Must have the ability to:*

*- Ignore distractions are an important function of this job.*

*- Problem solve and foresee conflicts and budgetary challenges.*

*- Make higher order decisions related to budget and personnel matters.*

*- Analyse and interpret four complex Collective Agreements to trigger action and processes, as well as advise the deans, directors and coordinators concerning personnel rights/obligations and management rights/obligations.*

*- Develop and perform analyses of budget scenarios for five programs (some government funded and some alternate revenue sourced)*

*- Forecast expenditures to determine available funds throughout the year to identify possible savings or year-end shortfalls due to changing enrolment projections; Identify and propose additional savings to cover unexpected expenses and shortfalls.*

*- Advise on most effective use of limited academic staffing resources; cost various scenarios and provide analysis of most cost-effective use of resources.*

*Physical:*

*- Sitting for extended periods of time.*

*- Carrying and storing files and file boxes as required.*

##### Working Conditions

*This job has specific high stress periods, particularly during analysis of yearly operations and hiring seasons. In addition, as the first point of contact for businesses, faculty, staff and contract individuals requesting immediate payments for services, this position requires a calm and professional approach in responding to these sometimes-difficult conversations. Quick information deadlines require excellent time management skills and effective prioritization of inquiries. Conflicting work demands from faculty, reporting deadlines and urgent requests, need constant evaluation for action. Changing deadlines and time pressures are constant in this position. Must be flexible to drop one task (leave temporarily incomplete) in order to prioritize and complete another more urgent matter. Must be able to manage several situations, problems, and projects simultaneously.*