

## **YORK UNIVERSITY**

### **Job Summary – CPM (Confidential, Professional and Managerial Employees)**

**Position Title:** Director, Student Financial Services

**Reports To:** University Registrar

Maternity Leave Replacement:  
03-29-2021 - 06-30-2022

**CPM Salary Grade:** H

**Job Code:** 950377

**Faculty/Department:** Office of the University Registrar

Annual Hiring Salary  
\$127,352

#### **I. JOB PURPOSE:**

The Director, Student Financial Services is a member of the University Registrar's senior leadership team and plays a key role in the financial, operational, and strategic leadership of the organization. Reporting to the University Registrar, the Director, Student Financial Services supports the academic mission of the University by providing strategic advice, issues management, and leadership with respect to their areas of responsibility. This position sets strategy, manages financial accountability and leads major cross-functional planning and delivery initiatives for the student financial units of the Office of the University Registrar (OUR). In addition, this position may also, as required, exercise decision-making authority as delegated by the University Registrar.

The Director, Student Financial Services collaborates with the Associate Registrar & Director, Student Recruitment and Admissions, the Director, Client Relations, the Associate Registrar & Director, Student Records & Scheduling, and the Director, Student Systems. This position provides direct leadership and strategic management to the student financial units: Scholarships, Bursaries and Awards, Financial Analysis & Fees, Financial Aid and Student Accounts. These units provide a range of core services to students, alumni, academic units and other campus operations in support of the student experience, student success and the academic mission. Key responsibilities include long-term planning to achieve institutional, divisional and Registrarial objectives; ensuring the accuracy, integrity and confidentiality of the student financial record for all 55,000 active students and administering Senate approved University policy in a manner that is student focused, fair and transparent.

Key to the success of this role is effective human resource leadership and management, encouragement of employee growth and development and ensuring compliance with York University human resources policies and practices, appropriate collective agreements, and related employment legislation.

As a senior representative of the OUR the Director, Student Financial Services maintains strategic partnerships within the Vice Provost Student's portfolio and collaborates with internal and external campus partners (e.g. faculties and the Ministry of Colleges and Universities) to build and maintain business operations. This position works with counterparts at other post-secondary institutions to foster inter-institutional collaboration and an understanding of Registrarial financial best practices across the U15 Group of Canadian Research Universities as well as Universities within Ontario.

#### **2. MAJOR DUTIES:**

##### **A) Strategic Direction and Accountability**

1. Establishes a clear vision and direction for all Registrarial financial services units: Scholarships, Bursaries and Awards, Financial Analysis & Fees, Student Accounts and Financial Aid; collaboratively works with the Office of the Vice-Provost Students, Faculties and the Senate Awards committee to develop and implement sound financial principles, to

ensure adherence of governmental regulations and compliance, risk management, and customer service.

2. Develops effective strategies around the utilization of Scholarships and Awards to support University Strategic Enrolment Management Targets.
3. Responsible for the financial planning and development of a comprehensive strategic plan that evaluates the financial and programmatic impacts of new initiatives, current student financial support programs, and effectiveness of financial control measures, risk management and compliance with governmental requirements. In support of the plan develops financial services metrics and milestones and plans the on-going communication towards achieving the unit strategic plan. In collaboration with other senior members of the OUR incorporates this information into the larger strategic picture for the office.
4. Responsible for the strategic direction of the student financial units of the OUR. When necessary, represent the University Registrar as an advocate for students in relation to the Scholarships and Awards, Student Accounts Receivables, and Student Financial Aid units.
5. Directs the analysis of the impact on changes to existing programs that may be mandated by legislative directives e.g. Federal, provincial and international issues. Makes decisions on how these changes may impact the organization's role in delivering financial support services to students.
6. In collaboration with the University Registrar the Director, Student Financial Services along with the other members of the OUR senior leadership team develops and refines a strategic plan for the office.
7. Leads the strategic planning exercises of the four financial services units of Scholarships, Bursaries and Awards, Financial Analysis & Fees, Financial Aid and Student Accounts through direct reports. Leads the development of multi-year Registrarial services/procedures/system needs, develops proposals and strategy documents that guide business needs relating to student financial support services.
8. Serves as a key strategic advisor to the University Registrar and the senior leadership team relating to student financial supports services; maintains a shared vision and, in accordance with identified priorities, ensures the successful execution and implementation of strategic initiatives into effective and efficient operational realities to achieve the stated goals and objectives of the strategic plan.
9. Accountable for managing unit resources to achieve the highest level of service provision to students and the University community using best practice principles for accessibility, timeliness, responsiveness, quality and relevance in accordance with Registrarial goals and the priorities, mission and values established in the Divisional strategic plan.
10. Analyzes industry and market trends and internal/external developments that may impact York's Registrarial needs and generates strategic plans, recommendations, policies, guidelines and procedures to be pro-active and plan for development.
11. Represents York University at external conferences such as the Ontario University Registrars Association (OURA), Ontario Association of Student Financial Aid Administrators (OASFAA) and Canadian Association of Student Financial Aid Administrators (CASFAA). National Association of Student Financial Aid Administrators (NASFAA).

## **B) Direction of Unit Operations and Administration**

1. Responsible for overseeing and ensuring accurate, timely and relevant financial management. Oversees the development and implementation of financial controls and reporting necessary to manage operating costs, student program costs and revenue. Oversees the monthly, quarterly, and annual reviews of the financial results.
2. Ensures the effective delivery of student support services pertaining to Scholarships, Bursaries and Awards, Student Accounts and Financial Aid units that provide prospective and current students with the best potential of access and success as it relates to these units.
3. Counsels the management team in developing and overseeing the administrative operations. Performs long-range planning for the three student financial services units. Plays a major role in the formulation, update, and implementation of a comprehensive business plan for student financial support services and balances short- and long-term strategic objectives to maximize the effectiveness of student financial support services.
4. Provides leadership and manages the development, implementation, review, analysis and control of financial policies, practices, and control procedures in compliance with Generally Accepted Accounting Principles and Standards and consistent with the University's policies and procedures. Develops, implements, and manages comprehensive financial analyses across all three Student Financial Service areas of responsibility. Ensures compliance with international, federal, and provincial reporting and audit requirements.
5. Ensures appropriate institute-wide financial control and fiduciary stewardship; identifies areas vulnerable from an audit perspective and develops plans/recommendations to strengthen those areas in conjunction with Internal Audit.
6. Oversees and advises on unit responses to annual audit exercises with Internal Audit and external auditor to ensure transparency of all financial transactions and proper document maintenance
7. Directs the analysis and interpretation of financial information and aids in the development of business operations plans; forecasts critical milestones and potential obstacles and evaluates alternate courses of action.
8. Leads the development of York University policies and procedures to govern operational decision making for the three Student Financial Services units including budgets, expense management, Award distribution, Scholarship fund management, Federal and International Financial Aid programs, bad debt management and student financial support accessibility.
9. Ensures unit reporting and informational requests are completed accurately and on time through coordination with other areas within the OUR, the University Faculties and external agencies (e.g. Government, Institutional partnerships); ensures the development and implementation of unit and organizational policies and procedures with regard to sound financial data and human resource management and the increased security of those resources. (e.g. confidentiality of information and protection of privacy as it relates to legislation).
10. Provides direction and advice on the safeguarding, usage and warehousing/retention of highly confidential student/personal financial data includes manual and automated information/data contained in computer systems, manual records other storage and disposal.

### **C) Leadership and Campus Community Involvement**

1. Fosters and maintains effective working relationships with the leadership team of the University Registrar, Faculties, Senate sub-committees, and the Division of Students.
2. Participates in Senate and institutional committees responsible for student financial support services. Works with members of the campus community on strategic policy development and serves on working groups with academic and administrative leaders and staff. Participates in collaboration with Ministry partners and other institutions when appropriate.
3. Builds strong working relationships with Deans, Associate Deans, and Senior Executives as well as Faculties, Students and Staff across campus to establish reliable and timely channels of communication to support service to students, staff and faculty, to initiate efficiencies and to promote collaboration and cooperation.
4. Highly skilled at managing constantly shifting priorities, this position will lead unit responses to issues that require crisis management; the Director, Student Financial Services is committed to being accessible, communicating openly with staff and campus stakeholders, working collaboratively and proactively to foster the exchange of ideas and innovative solutions that enhance the student experience.

### **D) Human Resource Management**

1. Responsible for being fully knowledgeable of all appropriate York collective agreements and human resource policies and procedures and applying them appropriately to the management of staff.
2. Responsible for promoting and advancing a culture of employment engagement, collaboration, and sustainable healthy employee relations.
3. Responsible for directly managing a team of CPM managers including coaching and mentoring, establishing clear direction, objectives performance measures and standards in support of divisional priorities. Makes decisions with respect to hiring, performance management, discipline, absence management, termination.
4. Responsible for ensuring all staff (CPM YUSA1, YUSA2 and Work Study) are treated with respect and in accordance with all employment related legislation and York HR policies and programs.
5. Responsible for ensuring CPM managers are managing in compliance with appropriate collective agreement(s). May be required to represent the employer at grievance hearings up to and including arbitration hearings.
6. Provides leadership and direction to managers regarding staffing and resourcing strategy within the operational units including organizational structure, budgetary direction, staff development, performance management and goal development activities in alignment with the values and strategic plan of the Division of Students. Demonstrates commitment to the values of Student Success: Collaboration, Care, Accountability, Respect, Innovation, Inclusion and Excellence.
7. Coaches and develops unit managers so that they are continually planning and assessing the goals for themselves and their units to achieve the mandate set out in the Divisional Strategic plan. Fosters an environment for open communication and dialogue including the sharing of best practices and creating an atmosphere of ongoing willingness to bring forth ideas that are challenging and innovative.

8. Advises and oversees the direction and coordination of managerial training and development.
9. Leads a culturally diverse workforce through continuous change and shifting priorities.

### 3. SUPERVISORY RESPONSIBILITIES:

Positions Supervised	No. of Incumbents
Manager Scholarships, Bursaries and Awards	1
Manager, Financial Aid	1
Manager, Student Accounts	1
Senior Financial Analyst	1
<b><i>Indirect Supervision (Supervises through direct reports)</i></b>	
Unionized Employees: YUSA	26
York University Temporary Agency	# as required
Workstudy	3

***Total number of permanent CPM and YUSA staff supervised directly and indirectly :*** 31 CPM and YUSA staff

***Nature of Supervisory Responsibility:***

Oversees and maintains senior level accountability for staff through direct and indirect reporting relationships. Responsibility for hiring, firing, assessing work performance and taking corrective action of managers directly reporting to the Director, Student Financial Services. Provides leadership and direction to managers regarding staffing and resourcing strategy within the operational units including organizational structure, budgetary direction, and staff development

### 4. PERSONAL CONTACTS:

**Type:** University Executive (Vice President, Assistant Vice President)

**Purpose:** To act as a resource person. To provide advice on Registrarial financial matters.

**Type:** Senior University Officials, Deans, Associate Deans, and Directors of Academic Service offices

**Purpose:** To provide institutional leadership and advice to the senior administration of the University and relevant academic bodies; to obtain/provide information; to ensure the effective development and implementation of all policies and procedures relating to current student financial services; to work collaboratively in the development of policies and procedures that ensure delivery of quality services and information to students and academic units

**Type:** Various University departments/Faculties.

**Purpose:** To provide institutional leadership and advice; to obtain/provide information; trouble shoots problematic situations that pertain to Registrarial student financial issues; to problem solve; to facilitate development of student service plans as they relate to Registrarial financial services.

**Type:** Senate Committees

**Purpose:** To act as a resource person and to provide institutional advice on Registrarial financial service matters.

**Type:** Students.

**Purpose:** To obtain/provide information; managing escalated situations with respect to student financial services; problem solving, appeals and records management/Registrarial issues.

**Type:** Parents

**Purpose:** To provide verification of with student permission or with appropriate court documentation, information on student financial records.

**Type:** Courts.

**Purpose:** Expert witness.

**Type:** Government departments/agencies.

**Purpose:** To provide reports and verification of compliance with required regulation and legislation.

**Type:** Other post-secondary institutions.

**Purpose:** To obtain/provide information; to benchmark success in delivering quality services to clientele.

## **5. DECISION MAKING:**

The Director, Student Financial Services exercises broad, substantive and decisive decision-making authority and is expected to establish Registrarial policies and procedures under the direction of the University Registrar for the University. The incumbent makes similarly substantive decisions related to a range of sizeable budgetary, resource allocation, hiring and firing, and human resources reorganization matters. The Director, Student Financial Services exercises substantive decision-making authority as it relates to Registrarial matters (e.g. streamlining work processes) and is expected to do so collaboratively with the University Registrar and administrative colleagues. In addition, this position is accountable for actions that will foresee and avoid problems that may affect the student financial record or that may impede turnaround and quality of service delivery to students. Executes/implements unit's strategic plans and initiatives and makes changes and adjusts priorities independently. When acting on behalf of the University Registrar has authority to make decisions within the full scope of the student financial services portfolio.

## **6. DIRECTION RECEIVED:**

Operates independently and decisively. As a direct report to the University Registrar, operates under broad guidelines as established by the Vice Provost Students, the University Registrar and/or by institutional policies developed by governing bodies. The incumbent is expected to work independently and at the strategic level, using extensive initiative. The amount of supervision or direction received is minimal; the incumbent provides leadership and expertise at a strategic level within the Registrarial student financial units they oversee, the York community and on pan-university committees and projects.

## **7. FINANCIAL/BUDGETARY CONTROL:**

Advises senior management on financial and planning issues relating to strategic, long term operating and revenue plans and annual budgets. Monitors financial operating costs and student program budgets and ensure reported revenues consistent with budget and institutional expectations. Has accountability for the research, preparation (including projections) and direction/oversight of three Registrarial units operating and planning budgets. Collaborates with the University Registrar on budget allocation; prepares annual operational budgets to meet business plan objectives and to meet university. Contributes to the development of multi-year business plans including identification of revenue generation activities and forecasting.

<b>Payroll Budget</b>	<b>\$2,512,295</b>
<b>Operating Budget</b>	<b>\$76,749</b>
<b>Other Budgets</b>	<b>\$31,000,000</b> (budget is \$22 million, \$3M for work study programs and \$6 million in endowments and trusts)
<b>Tuition Revenue</b>	<b>\$226.5M</b> (approximately)

***Other major accountabilities, e.g., information, materials, buildings, equipment, etc.***

Responsible for maintaining, distributing and safeguarding information within the student financial record; Provide strategic direction on the input, storage, organization and maintenance of information. Monitor and ensure that others use information in compliance with University financial

requirements (e.g. Internal Audit) and government requirements (e.g. FIPPA). Ensure compliance with Government and Ministry requirements (e.g. Provincial government, OSAP Ministry, Canada Revenue Agency, etc.). Unit processes are subject to audits from both internal and external auditors to ensure transparency of all financial transactions and proper document maintenance.

Non-compliance impacts could result in loss of funding status at either the provincial or federal level or from international agencies and could have an extreme impact on the ability of a student to attend York. Accountable for ensuring a secure environment for the student financial record; data loss or corruption could potentially signify loss of information which would impact on Student Accounts revenues and/or student funding and damage to a valuable University asset and University reputation.

## **8. QUALIFICATIONS:**

### ***A. Educational Requirements:***

University degree required preferably with master's level training in finance or business with a certified professional accounting designation (CPA) required.

### ***B. Experience Requirements:***

Seven to ten years in a management position within a post-secondary setting or a large complex organization. Demonstrated working knowledge of accounting and business practices and procedures to include quality controls, audit control, government regulations, compliance and customer service. A demonstrated ability to assemble and analyze information for reports and special projects. Exceptional broad-based general management experience with a solid background in finance and recent relevant experience in financial management, business management or related fields; a demonstrated understanding of budget development and management; billing operations, collections, grants and loans with strong financial management skills and the ability to manage funds effectively from a variety of sources. An understanding of at least two of the key areas of Students Accounts Receivable, Scholarships, Bursaries and Awards or Financial Aid including an understanding of the issues facing students as it relates to financial support services.

Demonstrated skill in the formulation and implementation of financial policies, programs and strategies that support an institution's enrolment management objectives and overarching academic plan. Past experience with work process review and change management including a demonstrated ability to handle conflict resulting from change management implementation and/or daily operational challenges. A proven track record of working productively and collaboratively with peers and units to achieve desired objectives; an ability to be innovative, forward looking and to take risks to bring about change and improve service delivery.

**This position requires the candidate to produce a verification of degree(s), credential(s) or equivalencies from accredited institutions and/or international equivalents at the time of interview.**

### ***A. Skills (Specialized knowledge):***

A commitment to providing a consistently high level of service to the organizational community and the external community and will show excellent initiative in the design and implementation of new work processes. Demonstrated ability to design and operationalize effective strategies related to improving student financial services delivery frameworks and possesses strong project management skills. Demonstrated ability to articulate and advocate on behalf of the students and work with relevant academic and administrative bodies to simplify policies and processes to enhance service delivery. Superior analytical skills with an advanced knowledge of postsecondary regulations, policies and procedures; superior communication skills (both oral and written) in order to deal consultatively with a wide variety of stakeholders in order to assimilate and articulate

complex legislation. Superior interpersonal, persuasive, negotiating, conflict management and facilitative skills; ability to build, motivate, coach and lead a team with a strong commitment to a team approach and the ability to mentor his/her managers. Ability to communicate information effectively, motivate teams and ensure successful completion of unit goals and objectives. A proven ability to manage multiple assignments within tight deadlines and successfully achieve objectives/designated milestones. A demonstrated commitment to professionalism, a strong work ethic, a commitment to high standards, integrity and stability, sound judgment, accountability and ownership. Ability to operate effectively and efficiently in a fast paced, continuously changing environment. Excellent human resource management, organizational, and research skills; highly developed diplomatic skills appropriate to a large and complex organization.

#### **9. THE WORK ENVIRONMENT AND THE PHYSICAL/SENSORY DEMANDS:**

General office environment including private office. Attends meetings in multiple locations around the campus and may frequently be away from the private office. Physical demands include interactive keyboarding skills. Sensory demands include a higher than usual level of concentration when reviewing fine details that relate to operational activities and the impact and outcome of strategic plans. Active listening skills to work with others and synthesize information.