



POSITION DESCRIPTION

POSITION: Confidential Assistant, Financial Services

DEPARTMENT: Finance

JOB NUMBER:

DIVISION/FACULTY: Finance

DATE REVISED: November 2021

ORGANIZATIONAL STRUCTURE

This role reports to the Chief Financial Officer (CFO).

PRIMARY FUNCTION

The Confidential Assistant is responsible for providing administrative support to the Chief Financial Officer and other leaders within the Finance department to achieve departmental objectives more effectively and efficiently. The position supports departmental planning and issues relating to the development of University policy, budgetary issues, and personnel matters that are highly confidential and sensitive in nature.

KEY RESPONSIBILITIES

1. Assumes responsibility for the smooth operation of the office as it relates to the roles and responsibilities of the Chief Financial Officer (i.e. telephone calls, coordinating meetings attended by the CFO, etc.). Coordinates vacation schedules for the leadership team in the Finance department.
2. Maintains files and records for the CFO. Tracks and retrieves information from Human Resources Information Systems and other business tools. Opens, sorts and distributes mail addressed to the CFO.
3. Compiles information, drafts and/or types reports, presentations and correspondence, including those of a highly sensitive nature: budget submissions, development of University policy, program outcome reviews, performance appraisals, layoffs, promotions, discipline, grievances and financial matters arising from arbitrations, and collective bargaining issues. Peruses confidential minutes and correspondence for matters requiring action, and alerts appropriate individuals.
4. Coordinates and attends department and other division meetings. Records, prepares and distributes minutes and agendas.
5. Participates in the development and review of department procedures, policies, plans and priorities. Gathers information and conducts research as necessary. Prepares drafts of University policies, procedures and regulations from working documents.
6. Supports the CFO in communicating with various stakeholders. Advises and responds to inquiries from the University community on the CFO's interpretation of policies, procedures

and practices (when requested to do so). Contacts outside agencies, universities, school boards and government ministries to obtain information on behalf of the CFO.

7. Supports the CFO and leaders within the department on staffing administration which includes, hiring and employee transaction administration, tracking staff evaluations, setting up and maintaining files for staff and hiring competitions.
8. Assists in the compilation of budget information on behalf of the Finance Department. Reviews departmental expenditures monthly and raises issues to the CFO's attention.
9. Provides assistance to other Finance leaders on highly sensitive issues and other confidential matters as needed.
10. Schedules appointments, meetings, interviews and travel arrangements on behalf of the CFO. Ensures that the CFO has necessary information and documentation for meetings.
11. Plans and coordinates departmental recognition activities, observation of significant milestones for team members and other events or dates as guided by the CFO.
12. Establishes a high personal standard of service and performance by actively participating in other duties as assigned, education seminars, training programs, etc.

EDUCATION & EXPERIENCE

- Bachelor's degree and three or more years of administrative experience supporting senior level management is required.
- Two years' experience supporting the development and maintenance of department budgets and preparing related reports.
- Two years' experience with managing internal and external communications and event planning and coordination in an institutional or corporate environment.
- Or an equivalent combination of education, training and experience.

QUALIFICATIONS

- Demonstrated ability to effectively manage a complex office or business that is customer service focused.
- Demonstrated tact and discretion in preparing, disclosing and handling information of a confidential and/or sensitive nature.
- Demonstrated strong interpersonal and report writing skills to provide effective administrative support at the executive level.
- Demonstrated ability to exercise sound judgment, discretion and the ability to maintain a high degree of confidentiality.
- Demonstrated ability to use related software including word processing, (40 wpm with a high degree of accuracy), intermediate proficiency with MS Office applications, internet browsers, Human Resource Information Systems, spreadsheet, and database and presentation software (such as PowerPoint) at an advanced level.
- Outstanding organizational skills and ability to prioritize workload and work under time pressures to meet deadlines.
- Intercampus travel is required, possession of a valid driver's license and access to a vehicle is preferred.