

Professional Job Position Description

Section I: Position information

Effective date	2026-04-17	<input checked="" type="checkbox"/> Update only	<input type="checkbox"/> Classification review
Position title	Finance Business Partner		
Position number	998781, 998782, 998790, 998934, 999761, 999789		
Classification level	Professional - C		
Position affiliation	<input type="checkbox"/> AUFA <input checked="" type="checkbox"/> Excluded		
Location	Virtual		
Department	Finance & Administration		
Reports to	Manager, Financial Planning and Budgets		

Position summary

Briefly describe the main purpose(s) of the position.

Reporting to the Manager, Financial Planning & Budget, the incumbent is responsible for contributing to the University's strategic direction and mission by providing an exceptional level of financial planning, analysis, business advice and decision support to leaders of the organization.

Duties and responsibilities

Organize by key responsibility area and include % of time spent where possible.

- Acting as the business partner for a portfolio of clients, assists and advises clients in achieving their financial and business goals. Key deliverables include
 - Budgets, monthly and quarterly variance analysis with explanations,
 - Financial advice to understand and interpret trends and forecasts
 - Ad hoc operating analysis to interpret the impact of financial levers on future performance.
- Supports business units in analyzing budget variances and creating accurate forecasts and projections using accounting principles and business acumen.
- Develops and utilizes financial models, reports, and visuals to improve efficiency and accuracy of decision making within the organization.
- Participates in the annual budget and financial forecasting.
- Uses sound professional judgement and business acumen to advise stakeholders of key financial risks and opportunities within their portfolios.
- Participates in the preparation of quarterly and annual variance analysis and reporting to the Executive Team, the Board of Governors, and external stakeholders
- Directly builds financial capacity within business units by clearly explaining and presenting complex financial data in an understandable way and without prejudice.
- Uses effective communication and presentation skills to educate and empower resource managers in the organization.

- Supports financial operating needs of portfolio clients including activities like developing business cases, participating as a Finance SME on cross functional projects
- Builds strong partnerships and relationships with key stakeholders within the organization.
- Collaborates and participates in financial review meetings with stakeholders.
- Maintains current knowledge of accounting principles and industry trends.

Occupational health and safety

Employees:

Responsible to participate in the AU OHS program as required.

Supervisors:

Responsible for awareness of one's OHS Responsibilities as an AU employee and supervisor, for participating in the AU OHS Program as required, and for ensuring the participation of employees in the AU OHS Program as required.

See: <https://ohs-pubstore.labour.alberta.ca/li008>

Classification factors

Communication

The incumbent communicates with business unit clients including Senior Leadership, Deans, Directors, Managers, and project managers as a trusted advisor of financial planning, analysis, and decision making.

The nature of this position, and the related duties and responsibilities performed, require the incumbent of this position to uphold the utmost degree of confidentiality.

The incumbent contributes to the development of reports to the Board, its Committees, and the public. The accuracy of these reports is of utmost importance.

Supervision

There are no direct reports

Impact of service or product

The incumbent must understand the goals and overarching strategies of the University and the operational challenges and opportunities within their client portfolio to actively support their clients.

The incumbent provides sound business advice, challenges, and influences their business unit clients in their operational decisions.

The ability of the incumbent to do this in an accurate and timely manner is key to helping the University achieve its strategic and financial goals.

Independence of action

The incumbent is expected to perform responsibilities in an independent fashion with minimal supervision and requires the ability to comprehend, analyze, and communicate complex financial information and advice.

Must work as an advocate for positive changes within the business units they are supporting.

The position is expected to collaborate and provide solutions rather than be instructed to perform tasks.

Complexity

Attention to detail is required for supporting business units through planning, analysis and advice including developing business cases, communicating financial impacts of decisions, and recommending cost efficient outcomes.

A strong understanding of accounting principles and the ability to understand, analyze and communicate complex financial data is required.

Planning

The incumbent assists their clients in developing financial plans, including: the development of submissions to the Institutional Budget process and relevant business cases; identification of potential repurposing opportunities/savings; and any other financial support specific to their client portfolio.

Signatures for section I

Incumbent signature		Date Select a date.
Supervisor signature		Date Select a date.

Section II: Qualifications

Qualifications

Includes education, experience, skills, abilities, and any other special qualifications required. The qualifications relate to the position not the incumbent.

- University Degree in Business, Accounting or Finance, a related Master's degree is an asset.
- An accounting designation is required (CPA).

- 5+ years of progressively responsible accounting and analytical financial experience.
- Superlative, demonstrated analytical skills.
- Strong interpersonal, communication, and presentation skills.
- Passion for supporting non-financial stakeholders in achieving their financial goals
- Knowledge and demonstrated application of business planning, modeling, and forecasting concepts.
- Demonstrated ability to create reports, charts, and visualization from complex financial data.
- Ability to interface with stakeholders at various levels, including senior management.
- Analytical with the ability to proactively make recommendations and effect positive, proactive changes with sound professional judgement.
- Must have an aptitude for problem solving, the ability to adapt to new situations and the ability to think outside the box while providing strong analysis and insight.
- Experience using accounting and budgeting software in a large organization is required.
- Experience with IBM TM1 Analytics software is an asset.
- Experience in a large unionized public sector organization is an asset.

Signatures for sections I and II

Department Head signature		Date Select a date.
Executive Officer signature		Date Select a date.
Human Resources review		Date Select a date.