Excluded Professional Position Description

Section I: Position information

Effective date 2026-04-01 ☐ Update only ☒ Classification review	
Position title	Manager, Finance Data Governance, Reporting and Systems
Position number	998487
Classification level	Excluded Professional D
Location	Virtual
Department	Financial Advisory Services
Reports to	Director, Financial Advisory Services

Position summary

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

The Manager, Finance Data Governance, Reporting and Systems plays a key role in advancing Athabasca University's financial data governance, reporting, and financial systems capabilities in support of evidence-based decision-making, institutional accountability, and effective stewardship of university resources.

Reporting to the Director, Financial Advisory Services, the incumbent leads the development and implementation of governance practices, standards, controls, and stewardship responsibilities for financial datasets, while strengthening the university's reporting, planning and financial operations environment through improved systems, processes, and integration.

The incumbent provides senior oversight and product ownership for financial planning and reporting systems, including IBM Planning Analytics, Cognos, and related data integrations, to support budgeting, forecasting, reporting, and decision-making for the university. In collaboration with Institutional Data Governance, the role is responsible for improving data quality, consistency, security, and trust in finance-related reporting, while reducing manual processes and supporting a modern, data-driven planning culture aligned with AU's strategic priorities.

The Manager leads and supervises a team of 2 to 3 analysts and works closely with Information Technology, Finance Operations, Facilities and other stakeholders across the university to support consistent reporting standards, system optimization, stronger governance practices, and improved access to reliable information for planning and operational decision-making.

Duties and responsibilities

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

Finance **Data Governance, Reporting, and Systems Leadership (35%)**

The incumbent collaborates with institutional data governance to lead the development, implementation, and continuous improvement of financial data governance, reporting, and financial planning systems practices within Financial Advisory Services.

Leads the establishment and maintenance of governance frameworks, standards, controls, stewardship practices, and documentation for financial and planning datasets to improve data quality, consistency, security, and accountability in line with institutional frameworks.

Provides leadership and subject matter expertise in the development of finance-related data governance practices and participates in broader institutional data governance initiatives as they are established.

Provides senior oversight and product ownership for finance systems, applications, reporting tools, and data integrations that support accounting, procurement, budgeting, forecasting, financial reporting, and decision-making across the university.

Leads the design, development, enhancement, and maintenance of reporting solutions, dashboards, and management reporting tools that improve access to reliable and meaningful financial information.

Supports the modernization of planning and reporting workflows through automation, system optimization, improved integration, and reduction of manual processes.

Develops and promotes standards, structures, and processes that support consistency in financial and management reporting across the university.

Financial and Operational Reporting, Analysis, and Decision Support (25%)

The incumbent supports the delivery of accurate, timely, and meaningful financial and operational reporting to strengthen planning, forecasting, and decision-making across the university.

Supports the development of reporting structures, performance measures, and reporting outputs that improve understanding of financial performance, resource use, trends, and key drivers.

Translates complex data, reporting, and systems issues into clear and practical insights, recommendations, and materials for leaders and stakeholders.

Supports Financial Advisory Services in providing high-quality reporting, analysis, and decision-support information to faculties, administrative units, and senior leadership.

Contributes to the development of financial reporting environments and tools that support effective resource allocation, planning, and institutional accountability using an institutional lens.

Promotes consistent reporting, data management, and finance system practices that strengthen trust in information and improve its usability across stakeholders.

Departmental Leadership and Management (25%)

The incumbent provides leadership, supervision, and day-to-day management of a team of 2 to 3 analyst roles within Financial Advisory Services.

Assigns work, establishes priorities, monitors deliverables, and supports the ongoing development of staff to ensure high-quality service, strong technical performance, and consistent practices.

Mentors and coaches team members to strengthen capabilities in reporting, systems support, analysis, data governance, and continuous improvement.

Supports recruitment, onboarding, performance management, and staff development activities, as required.

Fosters a team culture of accountability, collaboration, service excellence, and continuous improvement.

Provides leadership and guidance to the team in managing competing priorities and delivering reporting, governance, and systems initiatives in support of institutional needs.

Stakeholder Collaboration, Change Management, and Continuous Improvement (15%)

The incumbent develops and maintains collaborative relationships with stakeholders across the university to support governance, reporting, and systems priorities.

Works closely with Information Technology, Institutional Data Analysis, Finance Business Partners, and other stakeholders to support alignment in governance roles, data definitions, reporting standards, system integration, and access practices.

Supports change management, communication, and implementation efforts related to governance improvements, reporting enhancements, and financial planning system developments.

Provides guidance, training, and support to users and stakeholders to improve adoption and effective use of reporting tools, governance practices, and financial planning systems.

Actively identifies opportunities to improve processes, strengthen controls, and enhance the quality, efficiency, and effectiveness of reporting and governance services within Financial Advisory Services.

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 must possess strong interpersonal, written, and verbal communication skills and the ability to develop and maintain collaborative relationships across multiple functional areas. The Manager must be able to communicate effectively with technical and non-technical stakeholders and present complex governance, systems, and reporting matters in a clear and practical manner.

The incumbent must be able to synthesize and communicate complex financial, systems, and data-related information in a way that supports sound decision-making, especially in preparing reports, presentations, and recommendations for leaders and stakeholders.

Supervision

The incumbent is expected to work independently, with general direction from the Director, Financial Advisory Services, and in collaboration with other stakeholders as appropriate.

The position has direct supervisory responsibility for a team of 2 to 3 analyst roles and is responsible for assigning work, setting priorities, supporting staff development, and monitoring performance. The incumbent may also oversee project-based resources or temporary support staff, as required.

The incumbent provides functional leadership and subject matter expertise to stakeholders involved in finance-related data governance, reporting, and systems activities and supports consistent, effective practices across these functions.

Impact of service or product

The Director leads the development and implementation of financial planning and business analytics strategies and processes that serve to mature AU's approach to decision support, which is critical for the university.

Solid and proven professional judgement and attention to detail is necessary as errors in judgement and decision making, or inaccurate advice or information have serious consequences and impact on the university.

Independence of action

The incumbent is expected to work independently in all areas of responsibility and to manage priorities and deliverables in a timely manner.

The role requires regular interaction with stakeholders across the university on matters requiring analysis, coordination, clarification, judgment, and problem-solving.

The incumbent must demonstrate sound judgment, diplomacy, collaboration, and initiative, and must be able to recommend practical solutions to complex governance, reporting, and systems-related issues.

Complexity

The responsibilities assigned to this position involve a high degree of complexity arising from the intersection of data governance, financial reporting, systems oversight, planning processes, stakeholder coordination, and institutional priorities.

The work requires strong analytical and problem-solving abilities, organizational knowledge, systems understanding, and the ability to manage multiple priorities and competing deadlines.

The incumbent must operate effectively in an evolving environment where governance models, reporting needs, systems capabilities, and institutional priorities continue to mature.

The position involves access to sensitive financial and institutional data and requires a high level of discretion, judgment, and professionalism.

Planning

Strong planning and organizational skills are essential for this position. The incumbent leads and supports the development of governance structures, reporting enhancements, systems improvements, and related implementation activities in support of Financial Advisory Services and the university's strategic and operational needs.

The position contributes directly to improving institutional capability in planning, forecasting, reporting, and data-informed decision-making.

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.

Education and Experience

- Bachelor's degree in Finance, Accounting, Economics, Information Systems, Business, Data Management, or a related field.
- A professional designation such as CPA, CFA, CBIP, PMP, or equivalent is an asset.
- A minimum of 7–10 years of progressively responsible experience in financial reporting, data governance, financial systems, planning systems, business intelligence, corporate finance, or related roles is required.
- Demonstrated experience working with budgeting, forecasting, reporting, financial planning processes, or data management in a complex organization is required.
- Experience leading or supporting data governance, reporting modernization, systems improvement, or cross-functional data initiatives is required.
- Experience working with internal customers and stakeholders to identify, analyze, document, and validate business, reporting, data, and systems requirements is required.
- Experience with financial planning and reporting systems, enterprise reporting tools, and system integration is required.

- Experience with IBM Planning Analytics, Cognos Analytics, ERP systems, or comparable enterprise planning and reporting platforms is strongly preferred.
- Demonstrated experience developing or supporting governance standards, controls, documentation, stewardship responsibilities, reporting structures, or data quality practices is required.
- Experience collaborating with Information Technology, reporting and analysis teams, and operational stakeholders is required.
- Experience in a post-secondary or public-sector environment is an asset.
- Prior leadership, supervisory, or project leadership experience is an asset.
- Demonstrated ability to support change, improve processes, and advance cross-functional initiatives in a complex environment is required.

Skills and Abilities

- **Strategic and Analytical:** Understands governance, systems, and reporting requirements and can translate them into practical frameworks, controls, and solutions that support institutional planning and decision-making. Demonstrates strong analytical ability and sound judgment in solving complex problems.
- **Professional:** Acts with integrity, discretion, and accountability. Builds trustworthy relationships and demonstrates a consistent, collaborative, and service-oriented approach in working with stakeholders.
- **Leadership:** Provides leadership through expertise, collaboration, coaching, and influence. Supports adoption of improved governance, reporting, and systems practices and contributes to a culture of accountability and continuous improvement.
- **Service Oriented:** Understands stakeholder needs and works to deliver accurate, timely, and useful reporting, systems, and governance support that adds value to decision-making and planning.
- **Pragmatic Decision Maker:** Recognizes priorities, manages ambiguity, and applies sound judgment in recommending and implementing practical solutions.
- **Organized:** Demonstrates strong planning and time management skills and can manage multiple priorities, deadlines, and implementation activities effectively.
- **Communications:** Exhibits strong written and verbal communication, presentation, facilitation, and relationship-building skills. Able to explain complex technical or data-related issues in a clear and accessible manner.
- **Systems Aptitude:** Strong knowledge of financial systems, reporting tools, planning applications, spreadsheets, databases, and related technologies.
- **Analysis/Problem Solving:** Possesses strong problem-solving skills and an aptitude for identifying reporting, governance, and systems issues and developing effective solutions.

Signatures for sections I and II

Department Head signature		Date
Executive Officer signature		Date
Human Resources review		Date