**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Budget Manager

**Job Number:** L-061

**NOC:** 1311

**Band:** 9

**Department:** Library & Archives

**Supervisor Title:** Client Support & Technical Services Librarian

**Last Reviewed:** March 25, 2014

**Job Purpose**

Under the general direction of the unit librarian, the incumbent is responsible for managing the Library’s materials budget, overseeing the Library’s acquisitions processes, and electronic resource management for electronic books and streaming media. The Budget Manager contributes to Client Support operations by providing desk service. Duties are carried out using the library services platforms including integrated library system modules, MarcEdit, vendors’ systems, AACR2R and Library of Congress standards, remote databases, office applications software, and web editing tools.

**Key Activities**

*Finance;*

1. Within the library services platform, manages and monitors 200+ funds of over $1.2m annually with the goal of committing funds in the most efficient and timely manner to meet the needs of the academic community.
2. Using the integrated library system, oversees the library’s acquisitions payment activities by verifying and processing invoices for all library materials.
3. Primary contact with the University’s Financial Services Office (FSO), processing invoices with attention to the FSO requirements, taking into account foreign exchange rates, HST rebates, and vendors’ policies.
4. Reconciles monthly and annual reports with the University’s Financial Services Office statements.
5. Primary contact for payments and deposit accounts including those related to electronic scholarly resources acquired through federal and provincial licensing bodies, Canadian Research Knowledge Network (CRKN) and Ontario Council of University Libraries (OCUL).
6. Posts monthly rates of exchange.
7. For library VISA credit card holders, verifies documentation prior to compiling and approving logs.
8. Analyses annual acquisitions budgets and forecasts changes based on rates of exchange, vendor contracts, and new or cancelled scholarly resources.
9. For fleeting opportunities, provides advice to librarian on funds availability and implements decisions ensuring that expenditures are made as required.
10. Processes invoices up to $75,000 without prior authorization.
11. Coordinates with colleagues to ensure that daily cash floats and deposits are prepared and available for use by staff.
12. In conjunction with colleagues, reconciles daily transactions for cash, point of sale, and TrentU cards, entering data on daily transaction logs.

*Acquisitions;*

1. Coordinates workflow for departmental acquisitions processes.
2. Prepares annual departmental acquisitions budget letter including individual allocation and related information and distributes to faculty Library Coordinators and Chairs of 40+ academic departments.
3. Provides regular updates on status of departmental acquisitions budget, and answers inquiries on departmental budgets as requested.
4. Receives, organizes and prioritizes electronic acquisitions orders from 40+ academic departments.
5. Works with learning and liaison librarians to ensure that the acquisitions orders are handled efficiently and with attention to propriety requests and deadlines.
6. Ensures that materials ordered through acquisitions meet guidelines for preferred formats and editions in keeping with collection policies.
7. Corresponds with external vendors regarding invoices, payments, credits, and other business.
8. Provides advice to librarians on best practices for policies and forms.
9. Serves as departmental expert on best application of acquisitions component of integrated library software, database software applications, and business productivity tools.

*Electronic Resources Management;*

1. Bears primary responsibility for creation and maintenance of system logs associated with electronic books (e-books) and streaming media acquired under license by Trent University Library.
2. Ensures that logs are accurate and transparent, recording additions, deletions, and upgrades for records associated with e-books and streaming media.
3. Ensures that records for electronic resources are available on a timely basis with attention to the needs of the academic community.
4. Responsible for pickup/capture/transmission of bibliographic records associated with electronic resources as these become available from vendors/publishers/cataloguing agencies.
5. Prior to batch loading records for electronic resources, ensures these meet standards established in AACR2R, Library of Congress subject headings and classification schedules, with attention to local practices.
6. For new sets of electronic resources, runs a batch processing test setting up parameters using MarcEdit with attention to local practices.
7. Establishes and documents MarcEdit batch editing parameters for each vendor/publisher/cataloguing agency that supplies records for electronic resources.
8. Uses library software programmes to edit, de-dupe and load records into the local database with attention to local standards.
9. Performs quality checks on bibliographic records for electronic resources, editing, upgrading, or removing records/batch files as necessary.
10. When required by copyright/licensing provisions, responsible for updating or removal of specified records for electronic resources.

*Other Duties;*

1. Contributes to Client Support by providing service in conjunction with staff in the unit.
2. Updates web pages for unit as required.
3. Coordinates with colleagues to ensure client support for microforms services as required.
4. Serves as back up for processing and submitting student payroll sheets, in absence of colleagues.
5. Other duties as requested by the unit librarian.

**Education**

Honours University Degree (4 year) in a business related field or alternate (Commerce, Information Systems) with courses in computer science or information systems.

**Experience Required**

* Three to five years of recent and directly related experience with the establishment and management of materials budgets and acquisitions processes in academic libraries.
* Knowledge of business practices and regulations associated with payment of domestic and foreign invoices, including handling of foreign exchange, management of HST in the public sector.
* Ability to use keep abreast of a wide range of library services platforms including integrated library systems for funds management, acquisitions, and cataloguing in an academic library.
* Significant experience with spreadsheet and database software applications.
* Knowledge of academic publishing industry and trends in electronic publishing.
* Experience using integrated library system modules for acquisitions, cataloguing, database load and extract, and reports.
* Experience with cataloguing print and electronic resources using MARC cataloguing and familiarity with cataloguing standards developed by the Library of Congress.
* Familiarity with MarcEdit and experience leveraging this tool for batch editing of bibliographic records into the local database.
* Ability to use business productivity tools including Microsoft Office 365.
* Ability to handle multiple priorities in a changing environment, to organize workload and to multi-task effectively.
* Evidence of engagement in the workplace and profession.
* Excellent social skills and a positive attitude are essential along with a demonstrated commitment to continuous learning.