Financial Services fonds

Compiled by Erwin Wodarczak (2014, 2015)

*** Institutional records -- researcher access subject to review ***

University of British Columbia Archives
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- **Catalogue entry** (UBC Library catalogue)
Fonds Description

Financial Services fonds. –1925-2010.  
3.35 m of textual records.

Administrative History

Management of the financial affairs of the University of British Columbia were originally the responsibility of the Office of the Bursar. The first to hold the position of Bursar was F. Dallas (1916-34), followed by Angus MacLucas (1935-48). By the early 1950s, when Dean of Commerce Earle D. MacPhee also held the title of “Honorary Bursar”, UBC had grown to the extent that its financial affairs had diversified and required a full-time staff of ten people to manage accounting, buildings and grounds, food services, purchasing, and the book store. The Office of the Bursar continued to grow as its responsibilities evolved. Walter White was the last to hold the title of Bursar, until his retirement in 1984. That year, A.B. Gellatly was named the first Vice-President of Finance. Since the 1980s the responsible vice-presidential positions have been known as Finance, Finance and Administration, or Financial Services, and at various times they have had ultimate responsibility for such services as supply management, campus security, the UBC Bookstore, the Development Office, food services, land and building services, and human resources, as well budgeting, treasury, and other business and financial operations.

Scope and Content

Fonds consists of records produced by or for UBC Financial Services which document the University’s finances, including annual financial reports and statements, budgets, appraisals, and staff training. The records are arranged in four series: Financial Reports and Statements, Budgets, Appraisalment, and Training Documentation.

Notes

Fonds consists of institutional records – access requests must be reviewed by the University’s FOIPOP Coordinator.

Beginning in 1961, more than one version of each annual financial report or consolidated financial statement was produced. One version was “published in accordance with the Financial Information Act” for public distribution. Others were published for the information of the Board of Governors or the University administration.

Materials were transferred from Financial Services in 2014 and 2015. Further accruals are expected.
Series Descriptions

1.27 m.

Series consists of financial reports and statements for the University and for related organizations supported by the University.

Boxes 1-11

1.44 m.

Series consists of annual budgets prepared for the University, and related budget summaries and budget and planning narratives.

Boxes 11-18

Appraiser series. – February 1965.
56 cm.

Series consists of an appraisal report produced for the University by the General Appraisal Company of Vancouver, appraising the value of UBC’s properties and physical assets. The report comprises nine volumes, with an index included with Volume 1, and a recapitulation.

Boxes 19-21

Training Documentation series. – 1990-2013
8 cm.

Series consists of documentation relating to the training of Financial Services staff, and includes a training library log, sample reports, and a course workbook for FMS (Financial Management System) certification.

Box 22
File List

FINANCIAL REPORTS AND STATEMENTS SERIES

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1-1  Balance Sheet and Statement of Revenue and Expenditure   March 31st, 1925
1-2  Balance Sheet and Statement of Revenue and Expenditure   March 31st, 1926
1-3  Balance Sheet and Statement of Revenue and Expenditure   March 31st, 1927
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[missing 1932-1935]
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[missing 1937]
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19-3  Appraisement – The University of British Columbia – General Appraisal Company – Vol. 3   [1965]
19-4  Appraisement – The University of British Columbia – General Appraisal Company – Vol. 4   [1965]

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20-1  Appraisement – The University of British Columbia – General Appraisal Company – Vol. 6   [1965]

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21-1  Appraisement – The University of British Columbia – General Appraisal Company – Vol. 8   [1965]
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