

Job Description

Job Title:	Research Finance Coordinator
Department:	Psychology
Reports To:	Administrative Officer
Jobs Reporting:	None
Salary Grade:	7
Effective Date:	Oct 2018

Primary Purpose

The Research Finance Coordinator provides financial services within the Department with particular focus in the areas of research grants, awards and contracts. In partnership with the Psychology Administrative Officer and the Faculty Financial Analyst, s/he establishes and maintains sound financial practices, provides expert financial guidance and problem-solving skills and ensures that financial activity in Psychology conforms to the University's financial policies and procedures. This position is responsible for ensuring that compliance standards and appropriate formal reporting are maintained and accomplishes this goal in consultation with the Faculty Financial Analyst and the Office of Research.

Key Accountabilities

Administrative Support

- Develop and manage administrative calendar of research activities including application deadlines, financial payment processes and annual reporting
- Maintain a comprehensive understanding of granting agencies' funding regulations, compliance criteria and provide guidance for department researchers; including necessary training sessions
- Consult with the Faculty Financial Analyst, attend Arts training sessions and Research Finance Compliance Workshops
- Ensure that financial practices, reporting and records are effectively developed within the department, with particular attention to complex funding arrangements, maintaining audit-ready records; ensuring that the department's interests are well represented at all relevant administrative levels
- Responsible for completing and reviewing all transactions and authorizing claims ensuring compliance with Tri-Agency guidelines of expense eligibility and documentation; in the case of high materiality/high risk payments, requests will be reviewed by the Research Finance Training and Compliance Officer prior to submission to Finance.
- Develop and maintain research account file system in accordance with relevant policies and accounting practices
- Order computer equipment and supplies
- Performs other duties as assigned

Financial Processing

- Prepare and submit all required reimbursements, purchase requests, travel, and payroll, in accordance with granting agency guidelines and established UW and department policies and procedures; Advise all researchers regarding relevant policies, procedures and department practices. Expenditures exceeding \$3,000 are forwarded to the Research Finance Training and Compliance Officer for pre-review prior to submission.

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- Ensure adherence to auditing and compliance regulations for each financial transaction and maintain required accuracy and documentation in departmental files
- Provide advice and assistance to researchers regarding monthly monitoring of grant activity; assist with problem-solving and error correction in partnership with the Faculty Financial Analyst, Office of Research and Finance

Financial Planning and Reporting

- Provide direction and guidance to Psychology researchers as appropriate. Grant preparation may be in partnership with Arts Research Development Officer and/or Faculty Financial Analyst
- Assist with dissemination of UW and Faculty policy and procedure updates to researchers and staff who direct responsibilities related to research finance; provide advice and training related to individual grants/contracts in cooperation with the Faculty Financial Analyst
- Available to represent the department in meetings with the Faculty of Arts, Office of Research, and Finance in other contexts where research funding is under discussion, development, or review
- Ensure that administrative systems are in place to monitor expenditures and budget commitments for multi-partner grants, such as CRC, CFI, ERA
- Provide annual financial summaries to Office of Research, while following UW and the Faculty of Arts policies and guidelines

**All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

Required Qualifications

Education

- Undergraduate degree or equivalent combination of education and / or experience

Experience

- Minimum 3 years administrative experience
- Demonstrated financial experience in a University work environment is preferred
- Experience with Unit4 and Concur is an asset

Knowledge/Skills/Abilities

- Aptitude for attention to detail and accuracy are essential
- Demonstrated high level of organizational skills for managing multiple priorities and deadlines with an ability to work independently and as a member of a team
- Excellent interpersonal and communication skills
- Demonstrated ability to take initiative with a commitment to process improvement
- Demonstrated ability to problem solve
- Experience working with international students and people from a wide variety of backgrounds and cultures an asset

Nature and Scope

- **Contacts:** Internal: communicates with members of the Department, Dean of Arts Office, Finance, and Office of Research; External: Suppliers
- **Level of Responsibility:** The job has specialized work at the department level with minimal supervision. The incumbent must possess good judgment, ability to prioritize, initiative and flexibility to adapt to competing tasks, setting his/her own work plan to ensure that financial and administrative

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tasks are completed in a timely manner and according to priorities set by the Administrative Officer. Ability to handle highly confidential matters with discretion.

- **Decision-Making Authority:** Decide type of document and supporting material required for a multitude of forms and application procedures. Answer financial inquiries about Department, university and granting agencies policies and procedures. Refer atypical problems to the Administrative Officer or the Faculty Financial Analyst.
- **Physical and Sensory Demands:** Typical of an administrative position in an office environment; peak times can include many simultaneous demands with frequent interruptions.
- **Working Environment:** Travel: none. Working hours: regular. Risks, physical and psychological: no significant risks.