

## Job Description

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<b>Job Title:</b>	Financial Officer
<b>Department:</b>	School of Architecture
<b>Reports To:</b>	Administrative Officer; Faculty Financial Officer
<b>Jobs Reporting:</b>	Research Coordinator, Computing Administrative Manager
<b>Salary Grade:</b>	USG 10
<b>Effective Date:</b>	April 2021

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### **Primary Purpose**

The Financial Officer (FO) offers financial information and direction to the senior management in the School of Architecture and the Rome Campus to ensure informed decision making while providing effective financial systems and strategic planning. He/she is responsible for the integrity of financial processes and systems within the School to ensure compliance with generally accepted accounting principles and the University of Waterloo policies and guidelines.

### **Key Accountabilities**

#### **Strategic Planning**

- Prepares multi-year budgetary forecasts identifying concerns and proposing solutions for improvement
- Compiles and delivers financial analysis to the School's senior management in support of long-term projects and planning
- Works with the Director of the School of Architecture in the development of business plans for the School (Program Expansion) to assess financial viability and sustainability; provides input into forecasting
- Identification of financial opportunities and consequences of long-term plans and proposals to facilitate effective strategic decision making

#### **Financial Management**

- In conjunction with the Director of the School and the Administrative Officer, the FO develops the annual operating budget for submission to the Dean of Engineering
- Provides financial management for the Rome Program overseeing a secondary foreign currency budget and bank account operating in Italy ensuring compliance with UW policy and current Italian legislation
- Responsible for authorization within the School for transactions under \$50,000.00
- In coordination with the Faculty Financial Officer, develop improve and implement strong internal financial controls
- Creates, reviews and approves financial reports on all funds in the School on a monthly basis bringing potential issues to management's awareness and providing corrections in a timely manner
- Provides financial management and direction for all faculty research initiatives ensuring all expenses adhere to the proper processes and compliance standards as outlined by the Office of Research and Tri-Agencies
- Responsible for research compliance review for all expenses and sign off for all claims for under \$3000.00
- Conducts periodic audits and reviews the financial policies and procedures in the School and provides direction to ensure financial accountability
- Oversees all personal reimbursement requests (travel claims and request for payments) and

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<p>FPER to ensure accuracy, compliance and eligibility</p> <ul style="list-style-type: none"><li>• Compiles pay request relating to the payment of temporary staff, part time/casual staff, adjuncts and teaching/research assistants</li><li>• Provides oversight for the management of PCard processes including the management of HST coding in adherence to CRA policies</li><li>• Answers queries and provides necessary direction to researchers regarding grant management</li><li>• Stewards ad hoc financial budgets for student and faculty initiatives as required</li><li>• Oversight for financials in ACM store</li></ul>
<p><b>Human Resources</b></p> <ul style="list-style-type: none"><li>• Deploy and manage research staff to meet or exceed departmental goals and objectives</li><li>• Coach, train and develop employees in their growth and development to ensure quality and consistency of services delivered</li><li>• Administer Annual Performance Plans and conduct regular reviews with direct reports</li><li>• Monitor and schedule vacation, overtime and other absences for the research staff while redistributing work to ensure customer service levels are maintained</li></ul>
<p><b>Operational Management Support</b></p> <ul style="list-style-type: none"><li>• Identifying or contributing to the identification, development and implementation of financial projects to improve service quality, synergies, stakeholder satisfaction, timeliness, staff capability and performance</li><li>• Foster a collaborative environment between the School, Dean's Office, Finance and Research</li><li>• Encourage and spearhead the sharing of best practices internally and across other business units on campus</li><li>• Participate in internal/external audits as required (Program Review and Accreditation)</li><li>• Train, coach and develop on financial and budgetary issues to help team members achieve personal goals and adhere to policy</li><li>• Spearheads implementation and training of new financial software</li></ul>

*\*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**

<p><b>Education</b></p> <ul style="list-style-type: none"><li>• Degree in Accounting or business-related discipline</li><li>• Recognized accounting designation (CPA) is required</li></ul>
<p><b>Experience</b></p> <ul style="list-style-type: none"><li>• A minimum of 5+ years progressive and demonstrated experience in financial management with a proven track record of implementing financial business practices and systems in a complex environment.</li><li>• Extensive experience in financial reporting, internal control, financial analysis, budgeting, forecasting and accounting.</li><li>• Experience in managing or mentoring and coaching staff is considered an asset.</li></ul>
<p><b>Knowledge/Skills/Abilities</b></p> <ul style="list-style-type: none"><li>• Strong financial acumen including, financial planning and analysis, budgeting and forecasting</li><li>• Supervisory experience and outstanding interpersonal, communication (oral and written) and organizational skills</li></ul>

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- Strong planning and project management skills
- Focusing on executing and completing tasks under pressure and managing conflicting priorities and deadlines
- Exposure to disagreeable conditions typical of a senior position exposed to stress and pressures from conflicting parties

### Nature and Scope

- **Contacts:** Within the School, communicates with all employees in all groups at levels. Externally significant contact with Faculty Financial Officer, Finance, HR and Office of Research
- **Level of Responsibility:** This is a senior staff position responsible for the development and implementation of School wide Financial processes and initiatives
- **Decision-Making Authority:** Signing authority on School operating, trust and endowment funds. Responsible for developing and implementing with other senior staff, strategic plans, practices and budgets.
- **Physical and Sensory Demands:** Minimal demands, typical of a senior executive position operating within an office environment
- **Working Environment:** Minimal exposure to disagreeable conditions typical of a senior executive position exposed to stress and pressure associated with senior level responsibilities