Job Description

Job Title:	Faculty Financial Analyst
Department:	Dean of Mathematics Office
Reports To:	Faculty Financial Officer
Jobs Reporting:	None
Salary Grade:	USG 10
Effective Date:	June 2023

Primary Purpose

Reporting to the Faculty Financial Officer, the Faculty Financial Analyst assists in ensuring that all financial activity in the Faculty of Mathematics is properly accounted for and available financial management tools are effectively utilized. The Faculty Financial Analyst provides the Faculty Financial Officer with information to support strategic and financial planning, management, and internal control.

Key Accountabilities

Financial analysis and management information

- Provide analytical support to the Faculty Financial Officer in respect of but not limited to (a) Identifying trends and areas of concern for further investigation and (b) Identifying areas that may need improvement by way of classification of transactions for management reporting and as decision support.
- Build, maintain, and recommend improvements to budget and planning data collection, submission processes, develop reports, investigate issues, and recommend feasible solutions to identified issues.
- Assist the Faculty Financial Officer in developing periodic and ad-hoc reports for the Dean and the Executive Officer, as may be needed.

Financial management and internal controls

- Understand university policies and procedures including research related sponsor guidelines.
- Conduct periodic review and audit of financial transactions in all funds within the Faculty of Mathematics to ensure compliance with applicable policies and procedures including research sponsor guidelines, and donor expectations in the case of donations.
- Review areas of risk in terms of deficits in departments and/or specific grants.
- Monitor computer equipment inventory and periodic replacements for staff and administrative faculty.
- Assist the Faculty Financial Officer in review, improvement and/or development of faculty financial procedures and adequate internal controls.

Financial transactions review and records management

- Review of P-Card transactions of assigned cardholders.
- Review Concur claims for assigned approvers prior to approval.
- Periodic review and management of user access to various university systems.
- Manage and monitor retention of financial transaction and related records in the Faculty of Mathematics and review business practices where necessary based on University policies and procedures.

Financial administrative support

- Assist Dean of Mathematics office staff concerning financial policies and procedures.
- Assist Associate Deans and their staff concerning financial policies and procedures.

- Serve as a resource to staff and faculty concerning university financial systems such as Unit4, Concur, CentreSuite, Quest, Vena etc.
- Identify training needs and opportunities for the administrative staff and assist the Faculty Financial Officer in the development, documentation, and delivery.

**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 related education/experience, and a recognized accounting designation in Canada (CPA).

Experience

- Minimum five years of related experience in data analytics, management reporting, financial planning, and analysis.
- Working experience on enterprise financial software and databases.
- Supervisory/management experience is an asset.

Knowledge/Skills/Abilities

- Excellent understanding of generally accepted accounting principles in Canada, and a good understanding of accounting requirements and financial practices of Canadian Universities.
- A working knowledge of SQL and modelling in Power BI (using M and DAX) is an asset. An in-depth (advanced) knowledge of Microsoft Excel is required.
- Demonstrated ability to organize, work well under pressure and execute a wide variety of tasks simultaneously and manage conflicting priorities within required timelines.
- Ability to build excellent working relationships with key individuals both inside and outside of the Faculty.

Nature and Scope

- **Contacts:** Significant internal faculty contacts include the Dean of Mathematics, the Executive Officer, the Faculty Financial Officer, Associate Deans and Departmental/Unit Heads. Within the University of Waterloo, significant interactions may be required with the Finance Department, Office of Research, and Human Resources. External contacts may include auditors, external funding sources, contractors, and suppliers.
- **Level of Responsibility:** This position is responsible for monitoring, interpreting and reporting on financial activity within the Faculty of Mathematics. In conjunction with the above activity, this position helps assess whether generally accepted accounting principles, and university policies and guidelines are being followed.
- **Decision-Making Authority:** This position exercises judgement in identifying improvements to financial processes and procedures in the Faculty of Mathematics and participates in the implementation of improved processes and internal controls. In collaboration with the Faculty Financial Officer interprets and applies University of Waterloo finance related policies, procedures, and guidelines.
- **Physical and Sensory Demands**: Minimal physical demands; operating within an office environment.
- **Working Environment:** Minimal exposure to disagreeable physical conditions. The Office of the Dean of Mathematics is a busy team oriented environment.