

## Job Description

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<b>Job Title:</b>	Financial Coordinator
<b>Department:</b>	David R. Cheriton School of Computer Science
<b>Reports To:</b>	Financial Officer
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 5-7
<b>Effective Date:</b>	October 2016

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### **Primary Purpose**

The Financial Coordinator works with an assigned set of research grant and contract holders in all aspects of their projects from initial grant/contract proposal generation, budget set-up, tracking monthly financial statements and assisting with project reports to funding agencies. The Financial Coordinator also supports the Financial Officer in managing the School's operating budget. Key accountabilities vary according to the USG level on this job description's associated Career Path.

### **Key Accountabilities**

#### **Financial Administration**

- Prepares and/or previews expense reimbursement claims.
- Guides faculty members, post docs and grad students and other support staff (as necessary) in the use of the expense reimbursement system.
- Coordinates the purchase of major supplies and equipment for the School and/or Researchers, maintaining records and ensuring eligibility and that budget allocations are adequate.
- Prepares casual pay requests and temporary employment contracts for assigned researchers.
- Provides back up to the School's Grad Office in preparation of TA, GRS and GRA payments.
- Processes CSCF chargebacks to all applicable research accounts.

#### **Financial Reporting**

- Determines if funds are available to support the strategic priorities of the Principal Investigator's research and/or the School.
- Ensures that all operating and research accounts are soundly managed, including monthly reconciliation of accounts, and that activities are in compliance with university policies and procedures and those of external granting agencies.
- Reviews and analyzes financial statements for assigned operating and research accounts.
- Reconciles financial statements for operating and research accounts on a monthly basis and report any concerns to the researcher and/or contract holders or Financial Officer; assists with problem-solving and error correction.
- Reviews Form 300s for assigned researchers.
- Provides guidance to researchers, research staff and students on financial rules and policies relevant to their grants and contracts.
- Understands the constraints of specific granting programs; forecast and recommend strategies to maximize the use and leverage of the research funding.

#### **Project Management**

- Develops and manages a calendar of research activities including application deadlines, financial payment processes and annual reporting.

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- Tracks project schedules and deadlines for reporting, and in conjunction with researchers ensure that the deadlines are met.
- Works with the Office of Research to ensure that key Intellectual Property (IP) issues and research ethics issues related to contracts and research grants are properly followed.
- Assists in the clarification of policies and procedures relating to grants, contracts, overhead and other sources of funding such as operating and trust accounts.
- Assists the Principal Investigator in the preparation of research budgets for major contracts and research grants.
- Maintains a record of all project agreements.

### **Other**

- Performs other duties as assigned.

*\*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**

- Bachelor's degree in Accounting, Finance or Business, or equivalent experience.
- Canadian accounting designation an asset. (See Career Path requirements for specific requirements at each USG level).

### **Experience**

- A strong financial background and experience working with major funding agencies such as NSERC, CFI, CRC, ERA, ORF, etc., in a research environment.

### **Knowledge/Skills/Abilities**

- Ability to adapt to changing administrative and financial systems.
- Excellent human relation skills, in particular, ability to work confidentially and strategically with faculty members and staff.
- Independent judgment in areas of time management, task prioritization and decision-making.
- Proven ability to manage a large volume of work, conflicting priorities and deadlines.
- Exceptional verbal and written communication ability.
- Intermediate/advanced experience with Microsoft Office, especially Excel including features such as databases and pivot tables. Experience with online financial reporting systems. Technical qualifications increase as the incumbent progresses on the Career Path for this position.

## **Nature and Scope**

- **Contacts:** Internally, makes contacts with partner or potential partner organizations to obtain action, reach agreement, influence and negotiate; occasionally to promote or settle highly sensitive matters: Finance Human Resources Procurement and Contract Services Office of Research Graduate Awards Office Undergraduate Awards Office Administrative staff in other departments/schools Directors within the School Faculty members, visitors and post-doctoral fellows. Externally, makes contacts with partner or potential partner organizations to obtain action, reach agreement and negotiate: Contractors and suppliers External funding sources Auditors
- **Level of Responsibility:** The level of responsibility increases as the incumbent progresses on the Career Path for this position.
- **Decision-Making Authority:** Makes decisions based on multiple factors: relevant policies, government regulations, strategic objectives. Often these objectives are competing, so judgment is

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required Makes decisions about priorities and appropriate actions to take to address financial issues/concerns based upon transaction volume, dollar value, and risk. Makes decisions about how best to communicate with relevant clients. Decision-making authority increases as the incumbent progresses on the Career Path for this position.

- **Physical and Sensory Demands:** Minimal demands typical of an administrative position within an office environment.
- **Working Environment:** Travel, None. Working Hours, regular working hours Risks – physical and psychological – no significant risks, minimal exposure to disagreeable conditions typical of a financial position.