

Job Description

Job Title:	Administrative and Financial Coordinator
Department:	Centre for Career Action
Reports To:	Director, Centre for Career Action
Jobs Reporting:	None
Salary Grade:	USG 6
Effective Date:	May 2021

Primary Purpose

The Administrative and Financial Coordinator works within the context of a busy career centre that aims to provide equity-informed, anti-oppressive supports to students, alumni, postdocs and employees in achieving their career and employment goals. This individual is a core member of the centre's behind-the-scenes operations team. They are responsible for financial oversight of the CCA portfolio and oversight of its human resources activities. Further, the Administrative and Financial Coordinator is responsible for providing logistical, operational, administrative, and project management support to the Director, Centre for Career Action (CCA).

The incumbent also coordinates the day-to-day operations of the department, particularly in relation to financial administration, staff onboarding and scheduling. The incumbent supports strategic planning, budget management, space/resource management, hiring processes, and other core business functions for the department. The Administrative and Financial Coordinator assists CCA managers in the implementation of special projects and initiatives, supporting a large staff of more than 24 full-time and 20 casual staff.

Key Accountabilities

Financial Oversight

- Develops current and future annual operating budgets and expense projections ensuring strategic plans and goals are met, with input and approval from the Director
- Along with the Executive Officer for Co-operative and Experiential Education (CEE), liaises with Central Finance on various financial matters including: budget, revenue, and expense transactions (including Concur, P-card, and invoices)
- Provides financial guidance to CCA staff, including, but not limited to answering process and policy questions related to Concur reimbursements, expense approvals and eligibility
- Reviews budget with the Director, CCA on a regular basis and provides financial input to the portfolio's strategic and operating plans
- Performs ongoing monitoring of budgets and financial transactions during the fiscal year, as required and ensures that all work orders are soundly managed, under the guidance of the Executive Officer for CEE
- Maintains awareness of targeted funding (e.g. third party grants), including spending restrictions, and reporting requirements
- Tracks and reconciles expenses (including accounts payable, purchase orders, invoices, Purchasing Cards, honorariums, WatCards, petty cash, etc.) and budgets for all sources of funds within the portfolio

- Makes purchases and reviews and submits invoices for payment
- Develops, improves and promotes internal controls for financial processes and transactions
- Assists in providing accountability reporting to external agencies (e.g. Ministry of Colleges and Universities) and internally, to student and faculty groups (including SSAC – Student Services Advisory Council) on an ongoing basis
- Researches purchase requirements and provides sound and financially responsible recommendations to the Director, CCA
- Reconciles and deposits department's revenue, including e-commerce, invoices, credit card and cash transactions
- Oversees the implementation of ongoing measures to support the department's adherence to PCI Compliance standards

Human Resources Support

- Oversees hiring of student-staff (casual, co-op, work-study, work placement, etc.)
- Initiates onboarding (utilizing the CEE onboarding tool and through one-on-one interaction with new staff) with support and care to cultivate safety and trust; takes a similar approach to trainnew staff (full-time and casual) on technological systems, such as Workday, Concur, CentreSuite, WaterlooWorks booking functions, and Outlook
- Liaises with Human Resources as an important resource for CCA, , and troubleshoots Workday, payroll, technical, and other staff-related issues
- Ensures processes are in place for payroll approvals and payment of Career Leaders and other casual employees, TAs and co-op students in Workday
- Assists with coordinating the annual performance appraisal process
- Assists in the hire of work study and work placement students

Administration

Director and Department Support

- Effectively manages confidential and sensitive information
- Cultivates strong relationships and trust with staff at all levels across CCA and CEE and helps create a supportive environment
- Proactively manages the calendar and coordinates travel arrangements/itinerary of the CCA's director; assists in the scheduling of meetings for CCA managers and staff
- Maintains filing systems (hard and soft copies, as applicable), contracts and agreements for the department
- Schedules a wide variety and high volume of meetings, manages minutes documents, manages resources and arranges various sessions (internal and external)
- Identifies space implications for various programmatic directions, representing CCA needs on the building committee for the Tatham Centre
- Reports to the CEE Executive Officer to ensure the provision of proactive input to administrative, facilities, health and safety, and other operational guidelines and policies, as well as to align the handling of budgets
- Supports the director with drafting, reviewing and implementing CCA operational policies and procedures
- Coordinates multiple memberships for CCA staff, tracks and arranges opportunities for Professional Development
- Ensures adherence to University policies in all operations and activities (e.g. privacy, document retention)
- Supports staff to navigate sometimes-opaque systems and processes
- Performs other administrative duties as needed

Operations and Event Management

- Oversees operations and logistics for outreach and training activities, systems, equipment and other materials
- Identifies opportunities for continuous improvement of processes and systems and makes recommendations
- Responsible for scheduling and booking a high volume of workshops and events for a variety of audiences (employees, alumni, graduate and undergraduate students) each term
- Assists with the planning and implementation of other events and activities
- Liaises with various institutions, suppliers, CEE Administrators and Communications staff, Waterloo Undergraduate Student Association (WUSA), and caterers as needed to coordinate events as needed
- Assists in the promotion of events via internal outreach materials

**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

- Post-secondary education or equivalent education and experience. University degree is preferred
- Knowledge of generally accepted accounting principles and project management experience considered assets.

Experience

- 3-5 years of administrative support experience, preferably in a post-secondary setting
- Provision of general administrative support to a leader, executive or department
- Budget tracking and forecasting, financial management, and reporting experience
- Experience writing and editing such as reports, staff announcements, presentations

Knowledge/Skills/Abilities

- Substantial skill in managing complexity and coordinating a range of activities and demands
- Responsibility, maturity, and excellent problem-solving skills are critical
- Proven ability to build strong relationships and influence individuals at all levels of an organization
- Ability to be supportive, patient, calm and organized during busy, changing or challenging times
- Writing and organizational skills are key, as are managing conflicting priorities from multiple stakeholders
- Proven strategic and pragmatic thinker, has excellent interpersonal skills, a proven record of demonstrated tact, judgement and diplomacy, confidence, organization, and the ability to assimilate information and analyze data quickly
- Demonstrated ability to make independent decisions
- Attention to detail (e.g. as it relates to scheduling, travel arrangements, report content, etc.)
- Knowledge of University of Waterloo finance-related policies, guidelines and cash handling procedures an asset
- Specialized work with minimal supervision; ability to manage own schedule and balance competing priorities in a fast-paced work environment
- Experience with resolving scheduling conflicts and applies judgment to determine priority meetings and relationships, gathers information and compiles/writes reports

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- Demonstrates excellent communication (oral and written) with the ability to write communications on behalf of the director or managers
- Exceptional organizational, time-management, interpersonal skills, and diplomacy are required
- Motivated, self-directed, able to work independently and collaboratively as part of a diverse team
- Advanced proficiency in Microsoft Office suite, Unit4, Workday, Concur, CentreSuite, and Outlook
- Attitude and aptitude for continuous improvement and change management

Nature and Scope

- **Contacts:** Must have excellent interpersonal skills, diplomacy, and tact. Clear, effective, and precise oral and written communication skills are required. This position represents the Centre for Career Action and interacts with both internal and external stakeholders. Internal: Close interaction with the office of the Associate Provost and other members of Co-operative and Experiential Education (CEE) as well as other units on campus including but not limited to Finance, Human Resources, Plant Operations; communications and interactions with CCA managers, full-time and casual staff, and students. External: workshop facilitators, guest presenters, global event attendees and institution representatives, conference organizers, membership organizations, and caterers.
- **Level of Responsibility:** Responsible for reporting and monitoring a budget of \$2 million. Receives some general guidance from the Director, but performs duties with independence and the exercise of strong judgement. Should be motivated, self-directed, and detail-oriented. Acts as Human Resource Support for director, managers, staff, and casual employees. Manages all CCA accounts, tracks spending and makes budget forecasts. Dotted line, Executive Officer, Cooperative and Experiential Education
- **Decision-Making Authority:** Responsible for the development and implementation of budgets and process improvements that support the departments' mission and goals. Is responsible for identifying changes in policies or systems and ensuring that they are communicated and procedures are put into place to implement them. Also responsible for making decisions related to scheduling, travel, the escalation of issues to the Director, meeting and event agendas and logistics. Problem solving and prioritizing are critical skills for this position. Unexpected issues and/or conflicts may arise and the incumbent must be capable of analyzing problems and quickly solving issues. The incumbent will be responsible for making decisions with respect to most efficient use of the Director's time (e.g. meetings, events, travel) and seeking advice when required. Authority for departmental administrative matters under the direction of the Director. Must be able to manage complex multiple tasks and competing priorities and deadlines. Must oversee and manage various departmental processes and procedures. Must be able to determine when a decision or communication exceeds the scope of the position and escalate as appropriate.
- **Physical and Sensory Demands:** This position requires the ability to work effectively in a fast-paced office environment and maintain a high level of attention to detail. The work environment may include lack of control over work pace due to work processes, irregular and/or high volumes beyond one's control, multiple and/or tight deadlines beyond one's control and constant interruptions (e.g. phone calls, emails, unplanned but urgent support requests, or emergencies). Requires extensive periods of sitting and concentrated use of visual senses. Requires focus, thoroughness, efficiency and accuracy.
- **Working Environment:** Frequent occasions of high demand for service and varying volumes of work at different times of the year. Exposed to stress and pressure associated with responsibilities, financial oversight and need for confidentiality. Located in a comfortable indoor area. Regular working hours; some weekend and/or evening work may be required.