

Job Description



Job Title:	Undergraduate Advisor
Department:	Math Business and Accounting Programs
Reports To:	Director, Mathematics Business and Accounting
Jobs Reporting:	None
Salary Grade:	USG 6
Effective Date:	February 2021

Primary Purpose

The Undergraduate Advisor provides academic advice and counselling to undergraduate students enrolled in Mathematics Business and Accounting Programs (MBAP) and provides support for undergraduate operations. The position is responsible for the effective administration of the MBAP, and for enhancing student success through appropriate advisement and support. This position requires a high degree of knowledge of requirements for admission, plan requirements, academic progression, scholarships, and graduation for the MBAP. The position is primarily responsible for the administrative structure and daily student advising of the UG programs in Financial Analysis and Risk Management (FARM), enrolling approximately seven hundred FARM majors, within MBAP.

Key Accountabilities

Student Advising

- Provides knowledgeable advice to undergraduate students regarding their choice of program, program requirements, program changes, plan modifications, enrolment issues, academic deadlines, and other issues in accordance with university policies and procedures.
- Provides approval for course selection, course override, plan modification, and basic standing and promotion petition forms.
- Monitors, evaluates, and communicates academic standing and progression to fulfillment of degree requirements.
- Provides 'first-contact' advising to students in crisis; this role requires a thorough and confident background in UW ethics and crisis management for issues that range from academic concerns to personal difficulties. Immediate action may be required to connect students with university resources (e.g., Counselling Services) and/or provide practical assistance (e.g., negotiates extensions on course work with instructors).
- Acts as a first point of contact for first year student enquiries, prior to September, about course/program selection and enrolment, to ensure enrolment in- and timetabling for- their required courses.
- Consults when necessary with advisors in other academic units regarding students of mutual interest.
- Independently assess and confidentially document student problems and issues and, when appropriate, refer to the suitable individuals for follow-up.
- Maintain and edit undergraduate studies webpages including, but not limited to, course descriptions, plan requirements, advising information, and FAQ's.
- Communicate with staff in the Math Undergraduate Office, individuals from other faculties and departments who deal with teaching, recruitment, enrolment, or academic records.

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- Maintain current knowledge of policies and procedures concerning undergraduate students, academic programs, and document retention.

Administrative Support to Undergraduate Operations

- Works closely with the Math Undergraduate Office and the Registrar's Office on matters related to student concerns, such as grade appeals, petitions, course enrolment and other issues.
- Prepares block pre-enrolment for some specific Laurier BUS courses as determined to be needed by MBAP.
- Reviews and monitors course enrolments and watches reserves for low/high enrolment issues.
- Liases with advisors in other academic units to ensure awareness of course curriculum changes that may affect plans in MBAP.
- Reviews and tracks accommodation requests for MBAP students and works with the faculty and the scheduling team to plan a solution and communicate the result to students.
- Monitors and keeps a record of the four academic milestones required for FARM students.
- Runs the course reconciliation process for Double Degree students.
- Takes minutes at committee meetings related to Undergraduate Studies.
- Responsible for the structure and content of the MBAP student database, which is an essential tool for managing student records effectively, as well as providing critical information for reporting purposes and long-term planning.
- Maintains teaching resource library and processes orders for textbooks and reservations of materials held in the library.

Other Administrative Duties

- Special assignments related to undergraduate studies and undergraduate recruitment for MBAP, including assistance with various events.
- Organizes, participates, and attends special events for students, including: First Year Info Sessions, Ontario Universities Fair in Toronto, Fall Open House, March Break Open House, You@Waterloo Day, Math Ready, orientation, convocation receptions, and industrial partner visits to campus, as required.
- Other duties may be assigned by the Director, as a need arises.

**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

- University degree; equivalent combination of education and experience will be considered.

Experience

- 3 years of progressive experience in student advising and providing administrative support for undergraduate operations, including demonstrated experience providing sound academic advice and interpreting academic policy.

Knowledge/Skills/Abilities

- Client Service

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- Ability to respond to customer needs in a timely, professional, helpful and courteous manner regardless of customer attitude.
- Ability to meet and communicate service standards and track client satisfaction.
- Ability to provide crisis support to customers.
- Teamwork and Relationship Building
 - Resolve conflict actively and constructively, engaging in difficult conversations to find collaborative solutions.
- Communication
 - Proven business-appropriate oral and written communications skills.
 - Maintains confidentiality and demonstrates a sensitivity to diversity.
 - Excellent interpersonal and relationship-building skills with a demonstrated ability to handle faculty, staff, and students from around the world with tact and diplomacy.
- Managing Change
 - Demonstrated ability to use technological solutions to improve processes and communication.
 - Demonstrated ability to undergo continual training in matters of changing policy, as well as changing cultural trends.
- Problem Solving
 - Able to approach a complex task by breaking it down into component parts, and to use technology to assist breakdown and tracking.
 - Consults multiple sources for accurate information, and notices inconsistencies in available information.
- Planning and Organization
 - Ability to take ownership for projects of duration of several months; use good independent judgment when priorities are challenged.
 - Ability to make reasonable estimates of resource needs to complete projects.
 - Able to work independently and as part of a team, in a busy office environment, with multiple deadlines and conflicting requests.
 - Intermediate ability to use computer applications including word processing, database management, spreadsheets, and webpage editing.
- Technical
 - General knowledge of post-secondary curriculum, academic requirements, and admission regulations; knowledge of the Faculty of Mathematics undergraduate curriculum, academic requirements, and admission regulations is preferred.
 - Knowledge of Quest and ASIS would be considered an asset.
 - Intermediate experience with Microsoft Excel including features such as databases and pivot tables
 - Basic experience with web content management software.
 - Basic experience with database software including data entry and report generation.
 - Basic experience with student registration systems.

Nature and Scope

- **Contacts:** Staff, Faculty, and undergraduate students within MBAP. Math Undergraduate Office staff and advisors, Registrar's Office, Counselling Services, bookstore, and library.
- **Level of Responsibility:** This position has defined duties and responsibilities and is expected to work with minimal supervision and provide guidance to others, mainly academic advice to students. Maintain confidentiality of all materials through the Mathematics Undergraduate Office.

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- **Decision-Making Authority:** Make independent decisions regarding student advice based on the established rules, policies, and procedures. Has signing authority for approval of academic program changes, course enrolment and changes. Academic field specific and complex issues involve consultation with the Program Director.
 - **Physical and Sensory Demands:** : Minimal demands typical of an administrative position within an office environment.
 - **Working Environment:** Regular working hours, atypical evening/weekend work required for events only. Minimal exposure to disagreeable conditions typical of a client service position.