

## Job Description



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<b>Job Title:</b>	Financial Coordinator
<b>Department:</b>	Electrical & Computer Engineering
<b>Reports To:</b>	Financial Officer
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 7
<b>Effective Date:</b>	January 2022

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### **Primary Purpose**

The Financial Coordinator (Coordinator) administers post-award research funding and operating financial activities of an assigned group of faculty members and research groups in Electrical & Computer Engineering (ECE). The Coordinator provides guidance and financial support including reporting to reduce the liability to the department and University by proactive financial management of external research funding. The Coordinator ensures compliance with university and granting agency financial policies and procedures. The grants/contracts can include but are not limited to any federal, provincial, institutional, corporation/business, association/society, foundation, or any other agency/organization. The incumbent assists principal investigators (PI) to understand the constraints of specific granting guidelines, as well as recommend strategies to maximize the use or the leverage of research funding.

The Coordinator also supports the Financial Officer in managing the department's operating budget, and ensures compliance with financial management policies required for effective and efficient operations.

### **Key Accountabilities**

#### **Research Financial Administration and Compliance**

- Responsible for the financial administration of all operating and research grants/contracts for assigned faculty members in accordance with relevant university policies, granting agency guidelines, and negotiated sponsor agreements;
- Provide advice to Principal Investigators (PIs) concerning University and/or granting agency's policies and procedures (e.g. eligibility of expenses, preparation of forms, and comprehension of financial reports);
- Provide guidance to faculty members on University financial rules and policies including overhead allocation, release time stipend allocation, etc.;
- Ensure researchers and relevant research personnel are compliant with UW research finance policies and procedures, and those set forth by external granting agencies;
- Monitor, review and reconcile accounts monthly, and advise PIs of discrepancies;
- Review expenses and ensure budget allocations are appropriate and adequate;
- Confirm eligibility of expenditures against agency guidelines and University policies and procedures;
- Provide guidance on policies and procedures regarding research equipment and furniture purchases, and asset disposal associated with research funds;
- Review purchase of equipment and supplies for research groups, including the sourcing and procurement of major equipment and is compliant with Policy 17;

- Ensure compliance with policies and procedures concerning determination of independent contractor status for services;
- Review cover sheets and research proposal budgets to ensure overhead allocation, identify in-kind, financial and space commitments affecting departmental operating funds, or specification for research consulting payment;
- Monitor spending levels on research project grants and provide PIs with budget and financial information enabling them to manage their accounts;
- Ensure funds have been collected or returned, overspent balances have been transferred and expired grants/contracts have been inactivated;
- Identify overspends and work with the PI to resolve through re-allocation of expenses;
- Make recommendations regarding deficit resolution strategies to respective faculty members, and reviews them with the Financial Officer and Office of Research;
- Prepare custom financial reports based on researcher needs and interprets financial data to answer queries from PIs, identifying potential issues and anomalies;
- Recommend strategies to maximize the use of research funding within the constraints of specific granting programs;
- Answer uncommon and complex inquiries that may require working with the Office of Research to obtain clarification from sponsors;
- Responsible for financial reporting as required including data analysis and create detailed and summary reports as appropriate to the funding agency, industry contract or auditors;
- Forwards financial reports e.g. form 300's received from Office of Research to PIs and obtains approval signatures by stipulated deadline date.

### **Financial Administration**

- Review and process out-of-pocket expense and faculty professional expense reimbursement claims in reimbursement system (Concur);
- Assist client groups with understanding various financial reports, financial policies/procedures, financial terminology, and standard accounting practices;
- Advise on budget and cost-recovery requirements;
- Assist the Financial Officer to administer department operating budget;
- Prepare internal lab billings ensuring compliance with internal policies, external funding agency requirements, and accounting standards;
- Process all financial transactions including purchasing, payables, and both internal and external invoicing;
- Create and review journal entry transactions, including interdepartmental billings and ensure transaction is in compliance with the University's policies on fund transfers, applicable tax rules and expense transfer approvals;
- Reconcile assigned general ledger accounts including accounts receivable, advances, etc.;
- Analyze details of budget, actual expenditures, encumbrances, and prepare variance analysis reports;
- Provide guidance to others on the use of systems including Concur, Unit4 and Workday;
- Assist students (undergraduate and graduate) with the preparation of expense claims for travel and out-of-pocket expenses.

### **Human Resources Administration**

- Review requests for non-faculty appointments (post-doctoral fellows, research associates), temporary employment authorizations, casual payments, and change of salary allocations for eligibility and available funds;
- Ensure that contract end dates do not exceed the grant end date and prepare salary allocation forms as required;

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- Complete compliance review for Graduate Research Studentship and Graduate Research Assistants payments;
- Coordinate hiring documentation for temporary staff, USRA, URA, casual employees and process hires in Workday;
- Liaise between PIs, the department and Human Resources on issues relating to research personnel;
- Update database for casual, URA and URSA appointments.

### **Other**

- Act as backup to other Coordinators during absences or provide additional support as required;
- Assist with internal and external audits as required;
- Attend all meetings and training on new systems and procedures as required;
- Stay current on changes in granting agency regulations, University policies and procedures, research administration best practices, and new technology or programs;
- Special projects analysis, reporting, or other duties as assigned by the Financial Officer or Administrative Officer to meet the research goals and strategic objectives of the department.

*\*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 in accounting, post-secondary accounting diploma, or equivalent combination of education and experience.
- Accounting designation an asset.

### **Experience**

- 3 years related accounting experience including financial monitoring and analysis, preferably in a university environment.
- Research finance experience working with grants/contract administration an asset.
- An understanding of the academic environment, in particular research environment is preferred.
- Experience in financial reporting, internal control, financial analysis, budgeting, forecasting and accounting.
- Experience with reconciliation, troubleshooting and resolving variances, and reporting on the same.
- Strong computer skills with advanced experience with MS Excel including pivot tables, look-ups, macros, scenario analysis, etc.
- Experience with online enterprise financial reimbursement, procurement systems, human resource management, payroll systems, and databases.
- Previous experience using University internal systems (Concur, Unit4, Workday, FileMaker) are assets.

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

- Sound knowledge of accounting principles and financial judgement.
- Strong decision- making and critical thinking skills, and well-developed judgment are essential.
- Demonstrated ability to interpret policies, financial statements and apply guidelines and procedures.

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- Demonstrated problem-solving skills with the ability to identify issues, investigate and find creative solutions.
- Ability to analyze financial data and present it in a pertinent format.
- Strong client-service orientation with a focus on providing exceptional customer service in a team environment.
- Excellent interpersonal skills and ability to interact professionally and effectively with diverse constituencies of the university and external partners.
- Strong verbal and written communication skills are essential.
- Excellent organizational and time-management skills required to manage a high volume of work and multiple demands.
- Ability to work accurately with excellent attention to detail, efficiently and effectively both independently and as part of a team.
- Flexibility and initiative is necessary to work in a dynamic and challenging work environment.
- Demonstrated ability to handle confidential information with discretion and tact.
- Ability to adapt to changing administrative and financial systems.
- Knowledge of federal and provincial funding sources and related guidelines for institutional awards preferred.

### **Nature and Scope**

- **Contacts:** Internally, communicates with employees in all groups and areas at all levels. Must work confidentially and strategically with faculty members and staff. Makes contact to obtain action, reach agreement, influence and negotiate, occasionally to promote or settle highly sensitive matters. Answers uncommon and complex inquiries that are specific in nature and require specialized knowledge of policies and procedures. Must be able to tailor communication relating to financial information to the needs and understanding of non-financial audience. Contacts include the following:
  - ECE Chair and Administrative Officer
  - Faculty members, lab managers, staff, post-doctoral fellows, research and temporary employees
  - Students and visitors
  - Faculty Financial Officer and Faculty Financial Analyst
  - Engineering Research Office
  - Finance
  - Human Resources/Payroll
  - Procurement and Contract Services
  - Office of Research
  - Graduate Awards Office
  - Undergraduate Awards Office
  - Faculty and administrative staff in other departments/schools regarding interdisciplinary programs
  - Co-operative Education
  - Contractors and suppliers
  - Auditors
- **Level of Responsibility:** Responsible for applying specialized knowledge and understanding of financial policies and procedures to decide whether an expenditure or financial transaction is allowable. Ensures integrity of financial processes and practices. A high degree of accuracy and understanding of policies, procedures, practices and guidelines is expected. Works regularly with sensitive and confidential information. Non-compliance with contractual terms and/or granting agency guidelines could result in the return of funds, loss of future funds, and/or inability to collect funds owed to the University. Incorrect interpretation of agency and University policies can result in

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non-compliance with agency terms on the use of funds. Incorrect analysis or financial reporting or misrepresentation on use of research funds could result in the loss of University credibility.

- **Decision-Making Authority:** This position has specialized work and establishes priorities with minimal supervision. Identifies issues, exercises judgement and knowledge to take appropriate action to resolve issues/concerns. Receives direction on unusual or complex problems, and specific priorities e.g. year-end. Provides accurate and timely information for decision-making.
- **Physical and Sensory Demands:** Minimal demands typical of an administrative position within an office environment. Requires mental concentration and the ability to listen and use discretion.
- **Working Environment:** ECE is a busy environment and assists faculty, staff and students in their research related activities. ECE faculty members are highly professional, very research- and service-oriented, and maintain close ties with industry. Minimal exposure to disagreeable conditions typical of a position exposed to stress and pressure associated with financial responsibilities and deadline constraints. The Coordinator works independently and contributes to the overall workload of the team to support the financial administration of research and operating funds. Consistent communication and sharing of workloads is essential. Frequent procedural changes require the ability to grasp new concepts quickly.

This role involves minimal psychological risk resulting from unavoidable exposure to disagreeable situations and deals with distressed clients. Provides information or explanations that are not well received. There may be ambiguity of situations and shortcomings in data, and some internal clients may be demanding, may request breaking policy, and some situations may require escalation. This role responds to situations where there is a lot of pressure to find a solution quickly.