

## Job Description

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<b>Job Title:</b>	Faculty Financial Coordinator
<b>Department:</b>	Dean of Engineering Office
<b>Reports To:</b>	Faculty Financial Officer
<b>Jobs Reporting:</b>	Casual staff
<b>Salary Grade:</b>	USG 7
<b>Effective Date:</b>	November 2022

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### **Primary Purpose**

Under the general guidance of the Faculty Financial Officer, the Faculty Financial Coordinator ('FFC') is responsible for making or facilitating purchases on behalf of clients identified, particularly student teams and students involved in Capstone or other projects. The incumbent provides exceptional client support, expert advice, training, and guidance required to ensure first-class customer experience, as well as efficient and effective processing of financial transactions. The role is also responsible for following applicable University policies, procedures, accounting standards and sponsor guidelines.

The incumbent liaises with a number of service units across the University including Procurement, Finance, Dean of Engineering Office and clients' home departments to deliver on service expectations.

The FFC will be assigned to work with different service units in Engineering (e.g., Engineering Core Facilities including Student Design Centre) to meet the Faculty's operational needs. However, the incumbent's top priority is to support the needs of Engineering students, and to take care of purchasing logistics on students' behalf. The FFC will take concrete steps to reduce the time required to process out-of-pocket expenses.

### **Key Accountabilities**

#### **Conduct planning to anticipate clients' procurement needs**

- Collect, review, and analyze transactional data, report on trends
- Consult with Student Design Centre (SDC), Waterloo Engineering Endowment Foundation (WEEF), Dean's Office, Engineering Core Facilities, and other stakeholders to understand the procurement needs of clients
- Take proactive actions to optimize the procurement process and address issues up-front (e.g., bulk purchases)
- Work with Procurement to negotiate better pricing or to establish/maintain appropriate relationships with vendors

#### **Contribute to systematic solutions to address clients' purchasing needs**

- Work with Special Project Officer, Engineering Computing, and stakeholders to design, implement and continuously improve an electronic workflow that will collect order information from clients, compare purchase requests against approved budgets, manage approvals, track purchasing activities and report to sponsors upon request
- Connect this workflow with other enterprise solutions and 3<sup>rd</sup> party systems (if applicable) to streamline operations
- Monitor system performance and propose improvements

#### **Execute financial transactions in accordance with University policies and sponsor guidelines**

## Job Description



- Ensure all necessary approvals are in place and all policy requirements (including procurement rules) are met before an order is placed
- Obtain quotes from multiple vendors or participate in RPFs if required
- Adhere to strict client service standards
- Determine optimal purchasing methods which include Purchase Order, P-Card, Direct Billing.
- Purchase items on behalf of clients, arrange pick-up or direct delivery
- Facilitate returns and warranty if required
- Responsible for records keeping, and for reconciling receipts with financial transactions posted in the University's accounting system on a regular basis
- Provide additional information required to facilitate internal/external compliance or audit reviews

### **Facilitate expense claims initiated by clients**

- Take proactive actions to minimize out-of-pocket expenses incurred by clients
- Provide clients with necessary training upfront if out-of-pocket expenses cannot be avoided (e.g., travel claims)
- Facilitate cash advance if appropriate
- Support clients throughout the claim process in a timely manner; respond to inquiries relating to expense claims and escalate issues to the Executive Officer if appropriate
- Review expense claims to ensure all necessary approvals, receipts, and other supporting documents are included to minimize delay in processing
- Track processing time and report on trends
- Keep 3<sup>rd</sup> party sponsor (e.g., WEEF) informed regarding the status of claims funded by them and respond to their queries promptly

### **Support the financial transactions of various service units in Engineering**

- Review purchasing requests and ensure all necessary approvals are in place
- Enter purchasing requisitions, arrange direct billing, or fulfill P-Card purchases
- Responsible for records keeping
- Reconcile transactions with financial records

### **Other duties**

- Inventory/asset management
- Other duties as assigned from time to time

*\*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 in a related discipline or equivalent related education/experience
- A recognized accounting designation (CPA) considered an asset

### **Experience**

- Proven experience in providing exceptional client services in the University sector or comparable environment
- Experience with process improvement
- Consistent track record in supporting a broader spectrum of procurement, accounting, and finance functions
- Demonstrated extensive competencies in accounting and data management

## Job Description



- Strong communication and interpersonal skills and demonstrated organizational skills

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

- Proven ability to work with students, and to explain complex administrative tasks in a way that students will understand and follow
- The FFC must possess an excellent understanding of procurement practices and policies, as well as Generally Accepted Accounting Principles
- This position should have a working knowledge of University policies, processes and guidelines as they relate to procurement, expense reimbursement, and P-Card administration
- Strong analytical and interpersonal skills are required to provide clients with accurate, consistent, and professional advice
- The FFC must possess the ability to build excellent working relationships with key persons both in and outside the Faculty
- The FFC is expected to have strong Microsoft Office experience: advanced MS Word and Excel, intermediate PowerPoint, Access, Outlook, as well as working experience with financial software and databases
- Knowledge of process and workflow optimization is considered an asset

### **Nature and Scope**

- **Contacts: Significant Internal Relationships** - Within the Faculty of Engineering – Faculty Financial Officer, Executive Officer, Associate Dean (Resources & Planning), Faculty Budget Officer, personnel in Engineering Core Facilities including SDC. Within the University of Waterloo, The Faculty Financial Coordinator interacts with Procurement and Office of Finance. **Significant External Relationships** – sponsors such as WEEF.
- **Level of Responsibility:** The FFC executes on purchasing decisions and is responsible for following University policies, procedures, as well as sponsor guidelines.
- **Decision-Making Authority:** The Faculty Financial Coordinator will play a leadership role in guidance and monitoring oversight for student purchases / expense reimbursement in the Faculty of Engineering. The FFC must have an excellent understanding of university policies and procedures, as well as the guidelines from external sponsors and the University. The incumbent must be comfortable working within a framework of multiple principles and guidelines and applying professional judgment in situations where interpretation is required.
- **Physical and Sensory Demands:** This is a typical position operating in an office environment with minimal physical demands.
- **Working Environment:** Ranked top 40 globally, Waterloo Engineering is the largest engineering school in Canada. The Faculty's operation is complex, with over 8,000 undergraduate students enrolled in 14 academic programs. The Office of the Dean is a busy, team-oriented environment. Waterloo Engineering is committed to providing best possible student experience. Close communication and sharing of workloads are essential.