

## Job Description

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<b>Job Title:</b>	Financial Analyst
<b>Department:</b>	Stratford School
<b>Reports To:</b>	Administrative Officer
<b>Jobs Reporting:</b>	Administrative Assistant
<b>Salary Grade:</b>	USG 7
<b>Effective Date:</b>	July 2018

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### **Primary Purpose**

The Financial Analyst provides financial information to support effective management and strategic planning at the Stratford School. This position is the primary point of contact for all financial and administrative related matter and supports the effective and efficient operation of the campus. The incumbent is also responsible for the integrity of financial processes and practices within the campus to ensure conformity with generally accepted accounting principles and University of Waterloo policies and guidelines.

### **Key Accountabilities**

#### **Financial Strategy**

- Provides expert information management and financial analysis for Stratford's budgets and accounts in support of current and long-range planning, taking into account implications of commitments such as both ongoing and temporary staff appointments; on-going non-salary expenses and special projects
- Prepares multi-year projections
- Facilitates the optimum use of the operating budget by preparing regular status reports and forecasts by both identifying opportunities for expense control and reduction and by identifying anomalies and opportunities to bridge funding gaps
- Participates and supports the development and implementation of new budget models and other changes to financial management
- Provides confidential support to the AO, Director, FFO and Arts Dean's Office

#### **Financial Administration**

- Produces and monitors financial reports, assisting with overall and project budget reconciliation.
- Provides insight and analysis of budget status of projects within the department and alerts appropriate manager, AO or Director of potential budget challenges
- Assists with the preparation of funding requests and award submissions and preparing project reports for partner and funding agencies
- Maintains records of Signing Authority, Purchasing Cardholders and Petty Cash.
- Reviews and reconciles non-salary General Ledger accounts and deals with discrepancies or errors, ensuring accuracy of all financial transactions
- Processes casual payroll and overtime submissions
- Assists with processing travel claims and reimbursement requests
- Manages confidential files pertaining to Stratford budget and HR related matters
- Maintains and organizes financial records, files, reports and tools including electronic and physical document management
- Updates the Stratford SharePoint site as necessary

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<ul style="list-style-type: none"><li>• With the AO assists in the coordination of the procurement of services and equipment</li></ul>
<b>Best Practices and Controls</b> <ul style="list-style-type: none"><li>• Identifies, implements and oversees best practices in accounting and budgeting procedures and documentation, including participation in UW's Financial Officers and Administrators' Community</li><li>• Communicates with, trains and coaches any staff involved in financial activities regarding financial guidelines and procedures to ensure financial controls are in place</li><li>• Interprets key trends and issues for management and staff, to initiate the evaluation of new products, services or innovations</li><li>• Develops and maintains positive relationships with key members of the campus community in related fields and seeks an understanding of current and emerging issues in higher education</li></ul>
<b>Office Administration</b> <ul style="list-style-type: none"><li>• Supervises the Administrative Assistant</li><li>• Oversees salary administration and serves as a resource to HR payroll</li><li>• Oversees the use and reconciliation of P-cards</li><li>• Reviews and provides final approval for all personal reimbursement requests (travel claims and request for payment) to ensure accuracy, compliance, eligibility and appropriate account coding</li><li>• Maintains detailed records on all transactions and ensures that they agree with the University's financial records</li><li>• Provides support to the Director, as required</li><li>• Assists with tracking vacation, absences and training</li><li>• Handles routine and more complex and confidential document and report development</li></ul>

### Required Qualifications

<b>Education</b> <ul style="list-style-type: none"><li>• Post-secondary education required in accounting or business administration or equivalent</li></ul>
<b>Experience</b> <ul style="list-style-type: none"><li>• Three years of progressively responsible financial and administrative support experience performing duties related to the above mentioned key accountabilities, preferably in a university work environment, with a proven track record of achievement and success</li><li>• Experience coaching and motivating staff is preferred</li></ul>
<b>Knowledge/Skills/Abilities</b> <ul style="list-style-type: none"><li>• Working knowledge of budgets, accounting, financial management and financial systems project management</li><li>• Strong analytical skills and the ability to work effectively with all levels within the institution</li><li>• Excellent written and verbal communication skills</li><li>• Demonstrated ability to exercise independent judgement in problem solving and prioritization.</li><li>• Intermediate computer literacy with Microsoft Office (Outlook, Word, Excel) and financial, Human Resources and Payroll systems</li><li>• Advanced computer literacy utilizing Microsoft SharePoint and vendor purchasing systems</li><li>• Advanced computer literacy is preferred in Concur, Unit4, FORE, Agile and Peoplesoft</li></ul>

### Nature and Scope

- **Contacts:** The Financial Analyst makes contact with other departments to discuss information and problems and to obtain action, reach agreement and negotiate externally, makes contact with contractors and suppliers to discuss information, evaluate options, make purchases and solve problems.

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- **Level of Responsibility:** This position has defined specialized or routine tasks and receives specific guidance.
  - **Decision-Making Authority:** This position makes decisions regarding day to day financial and administrative matters in accordance with applicable Departmental policies and procedures and provides recommendations to the AO.
  - **Physical and Sensory Demands:** The position is exposed to minimal demands typical of an administrative position within an office environment. Minimal exposure to disagreeable conditions typical of a support role. Many interruptions and high attention to detail is required.
  - **Working Environment:** This position works regular business hours, Monday to Friday, 35 hours/week with evening hours occasionally required.