Job Description

Job Title:	Research Project Accountant
Department:	Office of Research
Reports To:	Senior Manager Research Finance
Jobs Reporting:	None
Salary Grade:	USG 9 - 11
Effective Date:	May 2025

Primary Purpose

The Research Project Accountant (RPA) is responsible for the financial planning, compliance, management and reporting of one or more major, complex research projects. These responsibilities include problem-solving with respect to the specific research projects they are assigned to, preparation of internal and external financial statements, management of the relationship between and the requirements of internal and external stakeholders, financial planning and analysis and ensuring adherence and compliance with financial guidelines and requirements as specified by sponsors and/or University policies. In addition, this position will include the provision of data for strategic financial planning and management. The individual must have a good working knowledge of policies and procedures to provide guidance on general day-to-day operations.

Key Accountabilities

Financial project planning, analysis and strategic decision support

- Coordinates, monitors, and directs the set-up of financial reporting structures for projects to ensure that project activity can be appropriately managed and reported on throughout its duration
- Participates in the preparation of annual project work plans in conjunction with the Principal Investigator (PI), project director and others as required
- Plans, manages, and coordinates the development of the annual project budget to support the work plan incorporating contributions from multiple stakeholders including supporting organizations, external funding agencies, private corporations and international funding sources and the distribution of research funds across multiple institutions via establishment and amendment of sub-grant agreements
- Prepares financial planning documentation and funding models that assist project management and other relevant managers within the university with planning and operations
- Responsible for ensuring all revenue and expenses related to the project are recorded in a timely manner and in accordance with generally accepted accounting principles, regularly monitored and supported by appropriate documentation
- As the key financial contact for project partners provides advice and support on project financial requirements and documentation
- Responsible for the fiscal viability of the research project by providing complex financial analysis, advice and support to the PI and project manager to assist them in identifying the financial consequences of current and long-range plans and proposals to facilitate effective strategic decision-making
- Responsible for the provision of regular internal financial reporting to project management on the financial status of the project including current position, annual and multi-year projections, including all partner (both internal and external to the University) budgets; highlighting potential problems and proposing possible solutions

- Interprets and implements existing policies, and develops and implements new financial and non-financial processes at the project level, in conjunction with appropriate stakeholders to support the achievement of project goals, while meeting university and sponsor requirements.
- Provides complex accounting advice and support to the PI and project manager regarding the management and internal control of research funds
- Provides financial and budgetary training, coaching, and development for administrative staff; conducts regular reviews of financial and expense reports generated by them; and meets to discuss potential problems or any issues that may arise
- Communicates regularly, either in person, by email or telephone, with project staff in each on-campus and collaborating institution to support effective financial planning, management, and internal control and to encourage the sharing of best practices

Financial administration, management and external reporting of research program

- Set up of financial structure within the University financial system
    - Review, gain an understanding and approve applicable research projects through the research awards management system
    - Liaise with the Office of Research pre-awards colleagues regarding new or unusual areas of the research agreement
    - Set up and maintain an accurate, well organized print and/or electronic project files
    - Set up the research project on Office of Research databases to allow tracking of key reporting, invoicing and audit dates
    - Set up budget, overhead and encumbrance journal entries in accordance with the specific requirements of the award agreement
    - Maintain accurate, well organized financial project files
    - Work with the PI and/or project director/manager to ensure all key financial reporting requirements and sponsor guidelines are met
- Financial management and external reporting
    - Prepare invoice or disbursement requests in accordance with invoicing schedules in the award agreement
    - Monitor outstanding invoices to ensure that project management are advised on a timely basis if payment may be an issue so that appropriate action can be taken
    - Ensure that reporting schedules are met by proactively tracking project schedules and reporting deadlines
    - Develop and implement a framework for reporting financial activity, both within the university and at collaborating institutions, to ensure financial activity can be accurately and efficiently tracked and reported on according to university and sponsor requirements;
    - Communicate and train project staff and/or collaborators on financial reporting framework and on financial reporting requirements and timescales.
    - Manage the process of obtaining, confirming and tracking all data/reporting/supporting documentation including in-kind certifications from project partners.
    - Manage the process of obtaining, confirming and tracking institutional commitments from internal stakeholders
    - Review the financial reports submitted by each partner on a regular basis and conduct meetings with the necessary staff to discuss potential issues
    - Monitor all project accounts to ensure all funds are spent appropriately by the end date or that an extension request submitted
    - Provide advice to the PI and/or project director/manager for options on resolving any surplus or deficit balances and prepare the applicable close out entries ensuring that appropriate authorization and supporting documentation has been provided

- Finalize the print and/or electronic files to ensure that all appropriate documentation is kept according to record retention guidelines

Eligibility and Compliance Review and Facilitation of audits

- Reviews advances, requests for payment, purchase requisitions, salary payments, invoices, and other designated research financial transactions for compliance and eligibility with external sponsor guidelines and University policies
- Resolve any issues with transactions prior to forwarding them to Finance/HR for processing
- Key point of contact with sponsor, UW or collaborating institution auditors during the audit process for the research project
- Provision of an overview of sponsor program details and UW policies and procedures to the auditors
- Preparation and reconciliation of audit support listings to auditors
- Provision of supporting documentation for transactions being audited
- Co-ordination and reconciliation of supporting documentation from collaborating institutions
- Responding to audit queries

Manage and Foster Relationships with Internal and External Stakeholders

- Key point of contact between the UW project team and representatives from partner organizations for financial advice, guidance and queries pertaining to the research project
- Provides strategic professional advice about accounting and process issues and offers financial analytical support to the project manager and to both on-campus and collaborating personnel
- Works closely with applicable project staff to ensure that all financial transactions are processed in a timely and efficient manner
- Key point of contact with collaborating research institutions to ensure appropriate financial reporting of research funds
- Key point of contact with external research sponsors regarding the financial management of the project, e.g. interpretation of guidelines or reporting requirements and the resolution of specific project needs/concerns/issues
- Liaise with Office of Research pre-awards colleagues regarding clarification or amendments to research agreements
- Liaise with other University academic support units to ensure appropriate management of research funds

Other

- Carries out other general and specific duties as may from time to time be determined

**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

- Completion of undergraduate degree, preferably in Accounting, Business or Finance
- Enrolment in a professional accounting designation (i.e. CPA or international equivalent) is recommended as progression to USG 10 requires completion of said designation

Experience

- A minimum of five years' experience with progressively greater responsibility in accounting/financial related environment

- Previous experience developing and managing complex project budgets of either significant dollar value ($1m+) or with significant international exposure
- Working knowledge of auditing practices and procedures
- Experience working both independently and as part of a team and managing workload and setting priorities
- Experience supervising workload and output of a financial team would be an advantage.
- Experience in an academic, not-for-profit and/or research environment is an asset

Knowledge/Skills/Abilities

- Proven ability to work within a framework of multiple principles and guidelines and to apply professional judgment in situations in which clear direction is unavailable and/or interpretation is required
- Demonstrated high degree of aptitude for critical thinking coupled with strong analytical and problem-solving skills and proficiency in written and oral communication
- Demonstrated superior interpersonal skills and the ability to work collaboratively, build consensus, maintain confidentiality, exhibit sensitivity to the needs and interests of a variety of stakeholders, and support the functioning of a diverse project team
- Strong organizational skills coupled with the ability to handle multiple tasks, meet deadlines, and excel in a fast-paced environment characterized by changing priorities
- Demonstrated ability to thrive in and contribute to an integrated and collaborative team environment and to apply a positive team approach to working with colleagues
- Working knowledge of research granting agencies and their programs is preferred

Nature and Scope

- **Contacts:** Internal: The RPA works most closely with members of the research project team, researchers and research administrative staff. He/She will also work closely with colleagues in the Office of Research for clarification of clauses and other information related to research agreements. This role will also closely interact with the Faculty Financial Officer as well as individuals in Finance, HR, Payroll, Graduate Studies and Procurement. This role requires that the incumbent asks clarifying questions, presents information and communicates decisions regarding the eligibility of expenditures and implementation of processes External: The RPA liaises with external research sponsors (e.g., federal or provincial government agencies, industry sponsors, etc.) to obtain, clarify and discuss information. The incumbent interacts with the university external and internal auditors on issues pertaining to their areas of expertise. In addition, this role interacts with colleagues in research and finance offices in institutions across Canada and internationally for the exchange of information, co-ordination of collaborative financial reporting and the sharing of best practices.
- **Level of Responsibility:** This role has the responsibility for the financial administration and management of a small number of complex research projects that may cross one or more major sponsors. This will require the incumbent to keep current on the full range of sponsor reporting requirements and guidelines. Failure to appropriately manage these research funds can have adverse financial implications for the University and can result in a significant risk to the reputation of both the project lead and the University. The RPA must handle confidential information with discretion. This role has specialized work with minimal supervision and provides leadership to others in their area of expertise.
- **Decision-Making Authority:** The RPA provides expertise as a key player in project planning decisions, and continually makes decisions about the most effective methods of operational financial strategies, personal interactions and collaboration, work flow, consultation, budget, and other key accountabilities; determines the optimal course of action to solve problems and to exert a positive influence on other stakeholders; and applies independent professional judgment in situations in which

clear direction is unavailable and/or interpretation is required. The incumbent must demonstrate the ability to manage workload and multiple and competing priorities.

- **Physical and Sensory Demands**: This role requires exertion of physical or sensory effort resulting in moderate fatigue or strain or risk of injury as a substantial amount of time (especially during busy year end reporting) is spent sitting at a computer with repetitive keyboard movements.
- **Working Environment:** This role involves minimal physical or psychological risk resulting from unavoidable exposure to hazardous, disagreeable or uncomfortable environmental conditions. There may be exposure to stress and pressure associated with management-level responsibilities, interruptions and urgent requests, and workloads that vary substantially according to the time of month and year. There may be unusual work hours with intermittent work outside the normal operating hours of the institution and occasional travel. Many reporting requirements are contractual in nature and are therefore time sensitive.