

## Job Description

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<b>Job Title:</b>	Financial Analyst – Special Projects
<b>Department:</b>	Dean of Science Office
<b>Reports To:</b>	Faculty Financial Officer
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 8
<b>Effective Date:</b>	January 2019

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### **Primary Purpose**

Primary purpose of the role is to support financial processes and related administrative activity in the Faculty of Science. Working as a central resource in the Dean of Science Office, the role has context and expertise that ensures continuity of financial operations in units (Departments/Schools) by providing short-term coverage of specific tasks or gaps in operations as required. The special projects component of the role provides agility required by the Faculty Financial Officer and Executive Officer in the execution of financial management within the Faculty. In addition, this role has appropriate context and skills to effectively gather information and conduct analysis to support budgetary planning and development undertaken by the FFO and EO.

### **Key Accountabilities**

#### **Financial Transaction Review & Internal Controls**

- Acts as a previewer for personal reimbursement claims as required
- Acts as a P-Card reviewer as required
- Ensures compliance with UW policies and guidelines while reviewing financial activity and transactions, and identifies gaps bringing to the awareness of the Faculty Financial Officer
- Conducts specific reviews of transactional activity as required by the FFO or EO

#### **Financial Analysis & Reporting**

- Supplements departmental reporting needs, as required, to ensure timely preparation of monthly financial reports
- Provides additional reporting and analysis as required by Chairs, Admin Officers, and Dean's Office in support of management and strategic planning requirements
- Serves as business analyst for the Faculty of Science investigating cost effectiveness of specific practices. Facilitates process improvements to information quality and integrity that have an impact on expenses
- Responsible for executing analysis and reconciliations on a regular basis of key Science operational components. Examples include :
  - internal charges (eg. telephone services)
  - operating revenue
  - grad student payments

#### **Operations Support & Analysis**

- Responsible for selected business operations in Dean of Science Office (e.g., telephone services, external examiner payments). Accountabilities for assignments include ensuring effective utilization of resources, providing an assessment of costs, and proposing changes to deliver efficiencies in operations
- Provides casual pay oversight. Set up as campus partner and timekeeper as required. Provides review and oversight of Workday functions and outcomes.

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- Conducts comparative analysis of operational and financial guidelines across other academic units to inform and develop guidelines for implementation within the Faculty of Science
- In conjunction with the EO, reviews data extracts from Human Resources with reference to job titles and reporting structures. Develops and updates tools (e.g. Org charts, extracts by appointment type)
- On behalf of the EO, supports hiring managers and academic heads within Science by ensure accuracy of reporting structures for staff and administrative appointments. Provides insights with respect to inconsistencies in appointment details across units
- Acts as administrative interface for WatSEF. Working with Director, Board and internal representatives to inform and facilitate operationalization of Board decisions. Maintains financial records and provides documentation and reporting to the WatSEF Board.

### **Education, Training and Communication**

- Under the direction of the FFO, undertakes front line education and training of users in financial systems (Concur, P-Card, Unit4) and in reinforcing UW and Faculty policies and guidelines relating to financial transactions

*\*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**

- College diploma, or university degree, preferably in a business related field, or equivalent education and experience

### **Experience**

- Minimum 5 years of experience working in an accounting, finance, audit or related field a must.
- Exceptional attention to detail.
- Ability to conduct analysis and draw insights that can be readily operationalized
- A broad understanding of business operations within a Faculty of Science from a financial and administrative perspective.
- Organizational and problem solving skills essential.
- Demonstrated adaptability and flexibility with respect to variations in scope of work and priority projects

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

- A background in accounting or audit.
- Must possess advanced Excel skills, and working knowledge of Word, Powerpoint, Outlook, and Sharepoint.
- Comfort and demonstrated experience working with financial software and databases essential.

## **Nature and Scope**

- **Contacts:** Within the Faculty of Science, primary contacts are the Executive Officer, Faculty Financial Officer and Faculty Financial Analyst. Additionally, strong working relationships required with key individuals and units within the Faculty of Science through the mandate of education and support in using financial systems and adhering to financial guidelines and policies. Under the direction of the Faculty Financial Officer, liaises with support units at University of Waterloo, including but not limited to: Finance, Human Resources, Office of Research, Grad Studies (GSPA), Student Awards (SAFA), Advancement, Plant Operations, and Procurement. External contact will be with auditors, when required.

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- **Level of Responsibility:** The position is integral to assuring UW/Faculty of Science financial policies and procedures are adhered to, and the incumbent will have responsibility for ensuring compliance is met in areas of assigned activity (eg. Concur, Unit 4)
  - **Decision-Making Authority:** The position works closely with the Faculty Financial Officer, Executive Officer, Chairs and Faculty of Science management to provide information relevant for decision making, and to advise on adherence to UW policies and procedures in relation to specific tasks assigned. Function of position is to inform management and to act as a facilitator of internal control.
  - **Physical and Sensory Demands:** Requires exertion of physical or sensory effort typical of an office position. Considerable screen and desk time, may result in slight fatigue, strain with some risk of related injury
  - **Working Environment:** Office based. Minimal exposure to disagreeable conditions.