

## Job Description

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<b>Job Title:</b>	Financial and Administrative Coordinator
<b>Department:</b>	Department of Statistics and Actuarial Science
<b>Reports To:</b>	Financial Officer
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 6
<b>Effective Date:</b>	March 2019

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### **Primary Purpose**

The Financial and Administrative Coordinator is responsible for providing financial and administrative support to the research and teaching activities of the department.

As Financial Coordinator, the incumbent works with research grant holders to provide financial administrative support and monitors the use of research funds (internal and/or external). The Financial Coordinator is responsible for the financial review of research transactions before they are approved and processed to ensure compliance with granting agency guidelines or sponsor regulations, research governance and University policies.

As Administrative Coordinator, he/she is responsible for providing administrative support for teaching initiatives, and processing of Faculty Professional Expense Reimbursement (FPER) and travel claims, in accordance with established policies and procedures and in accordance with University schedules. The incumbent receives direction from the Financial Officer and works closely with the Undergrad Program Coordinator and Instructional Support Coordinator.

The incumbent is required to continuously evaluate processes to ensure they are efficient, meet the strategic objectives of the department and make recommendations to the Chair, Administrative Officer and Financial Officer for improvements when appropriate.

### **Key Accountabilities**

#### **Financial Management:**

- Monitors financial status of grants and ensures expenditures are controlled within budget, milestones are met and all claims/invoices are provided in a timely and accurate manner according to deadlines
- Apply knowledge of granting agency guidelines and University financial regulations, policy, and procedures when reviewing, verifying, and approving expenditures
- Prepares and/or previews expense reimbursement claims for faculty, staff, retirees, graduate students, postdocs, visitors in compliance with University Policy and granting agencies requirements
- Prepares and/or previews FPER claims for faculty directly related to their professional duties
- Informs Principal Investigator (PI) and any affected departments of ineligible transactions on account and recommends appropriate action to take to ensure compliance with granting agency guidelines and University Policies
- Coordinates the electronic submission of research grant application materials by the PI to the Office of Research according to deadlines.

- Records constraints of specific granting programs; forecasts and recommends strategies to maximize the use and leverage of research funding, and advises on deficits and plans for spending surplus funds
- Coordinates documentation to support annual reporting on grants
- Ensures that project end dates and funding levels are in place by maintaining a project listing of active accounts with available funds. This listing provides information to Researcher and staff of active accounts, accounts that will be closing, and accounts in deficit in order to proactively manage the accounts
- Creates detailed reports on research grant transactions as requested.

### **Financial Compliance, Communication and Record Keeping**

- Provides guidance and assistance to PIs and other research staff on sponsor guidelines and UW financial policies relevant to their grants
- Provides guidance and assistance to students and staff on sponsor guidelines and UW policy for submitting reimbursement claims for out of pocket expenditures
- Communicates regularly and proactively with PI by email, telephone or in person to discuss discrepancies and follow-up to resolve issues
- Communicates with Chair, Administrative Officer and Financial Officer on a regular basis regarding research accounts and provides plan of action for problematic accounts as well as deficit resolutions
- Monitors over expenditures on research accounts and ensures appropriate authorizations are in place or future funding will be available before approving charges on research projects
- Proactively communicates updates on changing policies and procedures for external granting agencies and internal UW policy changes
- Exercises judgement for appropriateness and compliance of transactions on research accounts
- Reviews TA, GRS, GRA, USRA, URI and URA payments for eligibility
- Ensures audit trails are in place for all approved financial transactions and maintains support documentation of transactions for internal or external audit queries
- All other duties as assigned by Chair and/or Administrative and Financial Officer as required to meet with financial research goals and objectives of the department. Provides training assistance to the faculty, students, postdocs, etc. in regards to various aspects of research finance and University tools available to manage them.

### **Academic Administrative Support**

- Provides support to the Undergraduate Program Coordinator with scheduling midterm rooms, and test/exam marking spaces
- Provides assistance to teaching faculty, lecturers, sessionals, and graduate students with course note preparation, printing, scanning, photocopying, etc.
- Collects and maintains record of department course syllabus
- Coordinates accommodation and local travel for faculty hires, visitors, seminar speakers, external examiners, and distinguished lecturers
- Orders all general departmental and special order supplies, including business cards, for teaching and administrative purposes
- Co-ordinates documentation required for Purchase Card transactions as required by Finance
- Manages the access, distribution and collection of FOBs for department members
- Coordinates and assists in the preparation, collection and uploading of faculty annual activity reporting documents
- Handles general department telephone inquiries and re-directs individuals appropriately within the department and University

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- Manages mailroom facilities and distributes incoming mail, including but not limited to, courier packages, teaching materials, and hard and soft copies of postings from internal and external parties
- Provides support to the Actuarial Science group in the collection and mailing of exam materials to the SOA & CIA
- Ensures the SAS Lounge is maintained in good order and supplies for First Aid Kit are maintained.

*\*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**

- Postsecondary Diploma in Accounting, Business or a related discipline
- Equivalent combination of education and/or experience will be considered

#### **Experience**

- 3 years of experience working in an administrative support role with accountabilities related to financial administration, preferably in an academic institution
- A strong financial background and experience working with major funding agencies

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

- Requires extensive knowledge of various funding agency guidelines combined with understanding of applicable University policies and processes.
- Ability to adapt to change
- Excellent human relation skills, in particular, ability to work confidentially and strategically with faculty members and staff
- Independent judgment in areas of time management, task prioritization and decision-making
- Proven ability to manage a large volume of work, conflicting priorities and deadlines
- Exceptional verbal and written communication ability.
- Intermediate/advanced experience with Microsoft Office, especially Excel
- Experience with online financial reporting systems
- Experience with web based document repository
- Knowledge of Latex is an asset.

### Nature and Scope

- **Contacts:** Communicates with various departments and units to obtain action, reach agreement, influence and negotiate. Daily communication with faculty members, retirees, visitors, post-doctoral fellows, students. Position requires communication with external groups and vendors to obtain, clarify and discuss information, including but not limited to various suppliers, hotels, car rental and local transportation services.
- **Level of Responsibility:** The job has a mix of defined and routine tasks where the incumbent receives specific guidance as well as specialized work with minimal supervision where the individual provides guidance to others.
- **Decision-Making Authority:** Makes decisions based on multiple factors including relevant policies, government regulations, strategic objectives. Often these objectives are competing, so judgment is required. Makes decisions about priorities and appropriate actions to take to address financial issues/concerns based upon transaction volume, dollar value, and risk. Makes decisions about how best to communicate with relevant clients.

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- **Physical and Sensory Demands:** Minimal demands typical of an administrative position within an office environment.
  - **Working Environment:** Regular working hours. Minimal exposure to disagreeable conditions typical of a financial position. Occasionally promotes or settle highly sensitive matters.