Primary Purpose
Reporting to the Faculty Financial Officer, the Faculty Financial Analyst assists in ensuring that all financial activity in the Faculty of Engineering is properly accounted for and that available financial management tools are effectively applied. The Faculty Financial Analyst provides the Faculty Financial Officer with information to support financial planning, management, and control and for strategic planning.

Key Accountabilities
List the major responsibilities of the job, divided into 3 to 5 broad categories. These should reflect 80 - 90% of “what” the job does not the “how”. Insert a category heading and in bullet form below, state specific responsibilities.

1. Financial management and internal controls of research transactions within the Faculty of Engineering

- Has clear understanding of, and keep current with, university policies and procedures and research related sponsor guidelines to ensure compliance and dissemination within the Faculty
- Provides advice and support to research administrative staff, individual researchers and research groups and institutes regarding eligibility, management and control of research funds, including information about their financial data
- Meets regularly with the research administrative staff to support effective financial management and internal control and to encourage the sharing of best practices throughout the Faculty of Engineering
- Works closely with members of the Research Engineering, Research Finance and Compliance Team, Finance, Human Resources, other Faculty Financial Officers, to identify and address issues concerning compliance with sponsors agreements
- Conducts internal audits to ensure research transactions follow the required policies and procedures
- Provides financial oversight for CRC & IRC accounts within the Faculty, including completion of all related internal documentation, as well as regular financial risk assessment to ensure spending is aligned with the budgets
- Conducts periodic monitoring and identifies to management potential issues relating to research accounts in deficit within the Faculty

2. Financial management and internal controls of non-research transactions within the Faculty of Engineering

- Under the direction of the FFO, participates in periodic review and audit financial procedures and transactions within the Faculty of Engineering to ensure strong internal controls and efficient and effective financial accountability
- Under the direction of the FFO, identifies training and performance areas and participates in training to administrative staff; assists with development and documentation of training items
- Collects data and prepares reports related to the Faculty’s research overhead income and allocation within the Faculty
- Monitors and prepares reports of endowment and trust funds within the Faculty, identifying problems to the Faculty Financial Officer
Job Description

- Assists with monthly monitoring of financial reports for each academic and service unit, identifying potential problems to the Faculty Financial Officer
- Helps with ad hoc assignments associated with management and control of processes and document flow
- Helps with ad hoc assignments associated with data, information and trending analyses within the Faculty

3. Financial administration, communication and continuous support within the Faculty of Engineering

- Assists Dean of Engineering staff with financial processes and policies
- Assists Faculty Financial Officer to ensure that accounting methodology and procedures are well understood across the Faculty and that these procedures are followed
- Serves as a resource to the Faculty staff and faculty members with queries related to the university financial systems (i.e. Concur, Unit4)
- Develops reports and statistics to identify where improvements are needed for financial compliance

Required Qualifications
If hiring today, what would be the required education, experience, knowledge, skills and abilities?

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<thead>
<tr>
<th>Education</th>
<th>Undergraduate degree or equivalent related education/experience and a recognized accounting designation (CPA)</th>
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<tr>
<td>Experience</td>
<td>5+ years of progressive accounting experience. Consistent track record in supporting a broader spectrum of accounting and finance functions. Extensive competencies in accounting and data management, strong communication and interpersonal skills, and demonstrated organizational skills.</td>
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<tr>
<td>Knowledge/Skills/Abilities</td>
<td>The Faculty Financial Analyst must possess an excellent understanding of generally accepted accounting principles and practices as they relate to fund accounting and an in-depth knowledge of the accounting requirements and financial business of the University. This position should have a working knowledge of tax issues (such as HST, taxable benefits, etc.) as they relate to specific activities. Strong analytical and interpersonal skills are required to provide professional advice on accounting and process issues within Faculty departments. The Faculty Financial Analyst must possess the ability to build excellent working relationships with key persons both inside and outside the Faculty. The Faculty Financial Analyst must possess strong Microsoft Office experience: advanced MS Word and Excel, intermediate PowerPoint, Access, Outlook. Working experience with financial software and databases.</td>
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Nature and Scope
- **Contacts:** Significant Internal Relationships Within the Faculty of Engineering Dean of Engineering Executive Officer Faculty Financial Officer Administrative staff Researchers Within the University of Waterloo The Faculty Financial Analyst, under direction of the Faculty Financial Officer, is the liaison between the Faculty of Engineering and academic support units at the University of Waterloo, including: Finance Office Human Resources Office of Research Information Analysis and Planning Graduate Awards Office Undergraduate Awards Office Administrative staff in other Faculties Plant Operations Significant External Relationships Contractors Suppliers External funding sources Auditors
- **Level of Responsibility:** The Faculty Financial Analyst assists the Faculty Financial Officer in ensuring that accounting methodology and procedures are well understood across the Faculty and that these procedures are followed.
- **Decision-Making Authority:** The Faculty Financial Analyst will play a leadership role in guidance and monitoring oversight for research accounts in the Faculty of Engineering. The Faculty Financial Analyst must have an excellent understanding of university policy and procedures as well as the guidelines from funding agencies and the University. The incumbent must be comfortable working within a framework of multiple principles and guidelines and applying professional judgment in situations where clear direction is not available and/or interpretation is required.
Job Description

- **Physical and Sensory Demands**: This is a typical position operating in an office environment with minimal physical demands.

- **Working Environment**: One of the largest undergraduate engineering schools in Canada and expanding internationally, Waterloo Engineering is a multi-faceted engineering school. The Faculty of Engineering is administered by the Dean, eight Associate Deans, and eight academic department chairs/directors. The Office of the Dean of Engineering is a busy team working environment. The office responds to requests to assist faculty and students in their teaching, learning, research and related activities, as well as to questions and requests from staff within the Faculty and across campus. Close communication and sharing of workloads is essential.