Position Title: Coordinator, Financial Administration  
Department: Beedie School of Business  
Reports to: Manager, Budget and Financial Analysis  
Employee Group: APSA  

POSITION SUMMARY

The Coordinator, Financial Administration, administers Beedie School of Business (Beedie)’s operating budget and provides research grant financial administration in consultation with the supervisor. The Coordinator provides advice on administrative budget policies and provides administrative support to Beedie’s finance management team for day-to-day operations of its operating budget as well as the financial administration of its research, endowment and specific purpose funds. The Coordinator serves as a resource for faculty researchers and grant holders and assists with the administration of payroll documentation and timesheet reporting.

DUTIES AND RESPONSIBILITIES

1. Administers and provides budget support (e.g., operating, revenue and specific purpose budgets, and endowments) by:
   - Managing the month-end process including preparing reconciliations, overseeing transactions processed, investigating and resolving financial discrepancies.
   - Maintaining monthly records of reconciliations in consultation with the finance management team.
   - Providing oversight for the processing of expense claims, and preparing appointment forms for casual workers.
   - Developing and maintaining financial systems to monitor budget allocations and expenses; reviewing monthly encumbrances and preparing reports as requested.
   - Processing and reviewing cash advances, expense claims, credit card transactions and petty cash funds.
   - Preparing budget transfers and journal vouchers with proper supporting reconciliations or documentation for the finance management team.
   - Reviewing purchase orders and requisitions, reconciling credit card transactions, liaising with Procurement Office for encumbrance reconciliation, and any discrepancies or problem solving.
   - Developing administrative procedures for staff based on SFU policies and workflow requirements.
   - Providing policy information and administrative advice and recommendation to Beedie’s staff and faculty members regarding cash advances, expense claims (e.g., spending restrictions, internal/external funding agency and foundation policies).
   - Assisting with day-to-day activities related to the financial administration of the operating budget.

2. Assists with the financial administration of research grants and specific purpose funds by:
   - Providing information on established spending restrictions for various grant agencies and identifying the most efficient and effective solutions to issues/problems, in collaboration with the supervisor.
   - Designing, preparing and maintaining reports for designated grant accounts.
   - Reviewing grant expiration dates; notifying grantees; and assisting with their extension requests.
   - Liaising with Office of Research Services, Research Accounting, grant facilitator and external funding agencies to solve problems relating to granting agency and research contracts matters.
   - Prepares payroll appointment forms for research personnel as well as reporting their timesheets.
   - Maintaining, updating and monitoring grant records in TRACS
   - Assisting the Manager, Budget & Financial Analysis with any day-to-day tasks related to the research grant administration.
IMPACT OF DECISION MAKING

Makes decisions regarding:
- The day-to-day management of the operating, endowment, research, and specific purpose funds of the School.
- The appropriateness of expenditures; does not accept/process expenditures that do not meet policy and procedure guidelines.
- The provision of financial and administrative advice to departmental managers and staff.

RELATIONSHIPS

Establishes and maintains relationships with peers and contacts with access to information and to key business partners. Shares information and advice on how to get things done and who to involve.

**Primary Working Relationships**

**Internal Connections** – Works closely with Beedie’s finance management team on day-to-day tasks. Provides professional advice, guidance and consultation to Beedie’s faculty members and staff. Liaises with various SFU central offices.

**External Connections** – Liaises with vendors, customers and granting agencies on behalf of Beedie as required.

QUALIFICATIONS

Bachelor’s degree in Business Administration or related discipline, and two years of related experience in financial administration, research grant financial administration or an equivalent combination of education, training and experience.

Good knowledge of accounting principles and procedures.
Good knowledge of Canadian granting agency regulations and excellent grant financial administration skills.
Good knowledge of the University’s general and administrative policies, procedures, and processes.
Excellent organizational, analytical reasoning and problem-solving skills.
Excellent interpersonal and communication (verbal, written and presentation) skills.
Ability to prepare reports and maintain records with a high degree of accuracy.
Ability to handle confidential/sensitive material with discretion.
Ability to exercise mature judgment and initiative.
Ability to work with high volumes of work, set priorities and meet strict deadlines, while maintaining a high level of accuracy.