



# Job Description

(For Positions in CAW Local 555, Unit 1)

*Job descriptions do not include every duty that an individual in a position performs. They are intended to be representative and characteristic of the duties required and the level of work performed. Depending upon the size of the department or unit and its functional activities, incumbents who fall into this category may perform all of the duties listed below or, in the case of large departments or units, may be assigned to designated specialized functions.*

---

JD #:	<b>JD00178</b>	Pay Grade:	<b>9</b>
JD Title:	<b>Senior Research Accountant</b>	JD FTE Hours:	<b>35</b>
Job Family:	<b>Accounting</b>		

---

## General Description

Responsible for managing the financial activities of a portfolio of research projects involving University commitments, inter-institutional and private sector partnerships, as well as federal and provincial granting agencies.

## Representative Duties & Responsibilities

- Interpret and communicate applicable financial policies, procedures and guidelines to researchers and administrative personnel.
- Develop strategies for improving the efficiency and effectiveness of maximizing fund usage.
- Ensure research submissions, funding agreements, budgets, financial transactions, and financial reports comply with research contracts and current University and granting agency policies.
- Provide financial policy, procedure, and guideline information to cross-functional research groups at inception of award to ensure the group proceeds in accordance with University and sponsor policies.
- Review research accounts with researchers and administrative personnel.
- Monitor the financial status of projects.
- Identify and resolve financial issues with projects.
- Assist with internal and external audits by preparing audit files and responding to auditor inquiries.
- Develop financial budgets for submission with grant applications at the pre-award stage.
- Prepare financial projections and make adjustments to budgets throughout the fiscal year.
- Update researchers and administrative personnel on the status of accounts and provide recommendations on how to approach specific issues that need to be resolved.
- Develop customized spreadsheets for ad-hoc reports, queries, and financial analysis.
- Create forecasting and budgeting templates.
- Analyze and assess eligible research space and costs by gathering and compiling construction documents such as blueprints, engineer and architect comments, contribution budgets, and expense details.
- Generate invoices for granting agencies and ensure the collection of funds.
- Notify researchers and administrative personnel of account overdrafts and work with them to clear overdrafts.
- Facilitate and participate in working groups to streamline and improve research finance internal controls and respond to audit recommendations.
- Attend and participate in research group and departmental meetings.
- Develop and deliver training and information sessions.
- Scrutinize research contracts, policies, and guidelines for minor changes.
- Remain current with changes to granting agency policies and inform others of the change in rules for eligibility and administrative processes.
- Maintain the confidentiality of research funding and contract information.

## Supervision

- Provide direction to others in how to carry out work tasks.
- Provide orientation and show procedures to others.

---

## Qualifications

---

- Bachelor's degree in Business Administration or related field.
- Completion of advanced level courses of a recognized Canadian accounting designation.
- Requires a minimum of 3 years of relevant experience.

---

## Effort

---

### Physical Effort:

- A typical work day consists of greater than 3.5 hours of low physical effort for activities such as:
  - Intermittent periods of keyboarding to word process documents and input data into databases.
- Elements of moderate physical effort are not a regular feature of this job.
- Elements of high physical effort are not a regular feature of this job.

### Mental Effort:

- A typical work day occasionally requires routine mental effort for activities such as:
  - Collecting routine information to respond to inquiries, word processing financial reports, and inputting data into spreadsheets.
- A typical work day consists of up to 3.5 hours of moderate mental effort for activities such as:
  - Ensuring research submissions, funding agreements, budgets, financial transactions, and financial reports comply with research contracts and current University and granting agency policies.
  - Preparing financial projections and making adjustments to budgets throughout the fiscal year.
  - Updating researchers and administrative personnel on the status of accounts and providing recommendations on how to approach specific issues that need to be resolved.
- A typical work day consists of greater than 3.5 hours of high mental effort for activities such as:
  - Interpreting policies, procedures and guidelines.
  - Developing strategies for improving the efficiency and effectiveness of maximizing fund usage.
  - Scrutinizing research contracts, policies, and guidelines for minor changes.
  - Facilitating working groups to streamline and improve research finance internal controls and respond to audit recommendations.

---

## Working Conditions

---

### Physical Environment:

- There are no adverse physical environment conditions inherent to the job.

### Psychological Environment:

- Occasionally interacts with researchers who may be rude or upset.
- Frequently deals with multiple requests from researchers and simultaneous deadlines for reporting.

### Health & Safety:

- Risk to the incumbent is no higher than for the general population.

# Job Description Rating Sheet

(For Positions in CAW Local 555, Unit 1)

JD #:	<b>JD00178</b>	Pay Grade:	<b>9</b>
JD Title:	<b>Senior Research Accountant</b>	Total Points:	<b>574</b>
Job Family:	<b>Accounting</b>		

Factor	Subfactor	Level Rating	Points
<b>Skill</b>	1. Applied Reasoning and Analytical Skills	<b>5.0</b>	105
	2. Breadth of Knowledge	<b>2.0</b>	13
	3. Adaptation to Change/Updating of Learning	<b>2.0</b>	12
	4. Interpersonal Skill	<b>3.0</b>	39
	5. Education and Experience	<b>E3</b>	100
	6. Dexterity and Coordination	<b>2.0</b>	12
<b>Effort</b>	7. Physical Effort	<b>1.0</b>	3
	8. Mental Effort	<b>5.0</b>	100
<b>Responsibility</b>	9. Planning and Coordination	<b>3.0</b>	46
	10. Responsibility for Others	<b>2.0</b>	33
	11. Accountability for Decisions Actions Affecting People, Assets, and Information	<b>4.0</b>	93
<b>Working Conditions</b>	12. Physical Environment	<b>1.0</b>	3
	13. Psychological Environment	<b>2.0</b>	10
	14. Health and Safety	<b>1.0</b>	5