#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Administrative Coordinator, Finance

**Job Number:** X-466 | VIP: 1973

**Band:** EXEMPT-4

**Department:** Financial Services

**Supervisor Title:** Associate Vice President, Finance

**Last Reviewed:**  April 8, 2024

#### **Job Purpose:**

Reporting to the Associate Vice President, Finance, the Administrative Coordinator supports the AVP and the Financial Services Directors. Provides multi-faceted administrative support to the AVP and the Directors in a broad range of corporate finance and procurement activities including managing the daily operations of the Financial Services office, updating content of the various Financial Services websites and communications to the University community and external stakeholders, handling of sensitive financial information, planning and monitoring project plans and timelines, and organizing the execution and maintenance of financial contracts and external agreements in order to make the most efficient use of the AVP’s and Directors’ time. Coordinates and schedules the calendars of the AVP and Directors, and supports committees and meetings led by the AVP and Directors. Acts as liaison between the Financial Services office and other departments.

#### Key Activities:

##### Scheduling and Meeting Management

* Organizes and manages the day-to-day activities of the AVP and Directors to ensure efficient and effective office operations. Coordinates and schedules the calendars of the AVP and Directors. Performs multi-faceted duties to assist the AVP and Directors as required.
* Coordinates, schedules, and provides administrative support for meetings led by the AVP or Directors, including:
	+ Scheduling meeting dates, booking rooms, and making travel arrangements;
	+ Sending out invites and reminders to attendees, initiating calls for agenda items, preparing draft agendas, and compiling agenda packages, with Zoom/Teams links as required;
	+ Taking minutes of meetings, as required;
	+ Distributing and posting meeting materials to shared electronic folders;
	+ Tracking and sending out reminders of action items required to be completed in follow up to the meetings.

##### Communications

* Manages communication for the AVP and Directors, as requested, including correspondence, reports, presentations, and emails.
* Monitors follow-up with all distributions that require answers, responses, and written replies, and ensures the AVP and Directors have complete information upon which to base decisions.
* Keeps the AVP and Directors apprised of urgent and emerging issues that arise that may impact Financial Services.
* Provides information, advice and analysis regarding correspondence, special events, daily schedules, and university communications.
* Composes letters, memos and emails for internal faculty, staff, students, and external partners, associations, government agencies and the general public, as directed by the AVP or Directors.
* Conducts independent research, as required, involving interpretation and application of University policies, rules and regulations to aid in composition of correspondence.
* Assists with email management for the AVP and Directors, as directed.
* Works closely with AVP and Directors to proofread, edit and format reports as required for senior administration, the Board or its Committees (e.g., PVP, Finance & Property, Audit & Investment).
* Liaises with external entities such as the COFO, CAUBO, other post-secondary institutions, consultants, lawyers, bank managers, custodians, and investment managers. regarding coordination of meetings, reporting requirements, contract maintenance, and requests.
* Handles general enquiries and complaints, including referral to the appropriate portfolio for action and follow up.

##### Contract, Policy and Website Management

* Updates and manages the content of the Student Accounts, Financial Services and Purchasing Services websites. Ensures websites meet accessibility requirements.
* At least annually, reviews Financial Services policies and procedures and makes revisions based on current legislation, consultation from other University stakeholders and changes within Financial Services to the AVP and Directors for their review and approval. Coordinates the required consultation process with the University Secretariat and compiles feedback on proposed changes. Works with the University Secretariat to ensure finalized policies and procedures are posted to the relevant Financial Services websites and updates associated Financial Services website content accordingly.
* Assists the AVP and Directors with general review of contractual agreements bringing unusual or unexpected items to their attention. Coordinates any follow up with other University stakeholders as required.
* Maintains banking, investment manager and custodial agreements on behalf of the AVP and Directors. At least annually, coordinates any required updates to University signing authorities with the University Secretariat.

##### Office Management

* Responsible for document management; maintains shared folders and tracks time-sensitive documents for Financial Services to ensure files are organized, accurate and up to date.
* Tracks and coordinates documents for signature by the AVP Finance and the Senior Director (where appropriate) (e.g., contractual agreements, EFT, and cheque payments, hiring request forms etc.).
* Acts as purchasing agent for Financial Services for all equipment, furniture & office supplies, which includes liaison with suppliers, acquiring prices, processing orders or supervision of same and maintaining records and ensuring payment.
* Provides financial monitoring of the Financial Services departmental budgets, including:
	+ Oversees and continually monitors Financial Services departmental financial matters and makes recommendations regarding resolution of financial issues that arise.
	+ Prepares monthly journal entries, analyzing account problems to adjust/correct on a timely basis.
	+ Prepares and monitors financial reports and is responsible for budget reconciliation.
	+ Analyzes salaried lines to ensure alignment with budget and works with Payroll to resolve discrepancies.
	+ Reviews and reconciles non-salary expenses and deals with discrepancies.
* Coordinates department human resources activities for full-time employees including VIP approvals, hiring processes, selection committees, reference, and criminal record checks, pre, on, and off-boarding activities, and performance evaluations.

#### Education Required:

* Honours Bachelor’s Degree (4 years) in a business-related field.

#### Experience/Qualifications Required:

* A minimum of three (3) years of demonstrated experience in an administrative support role, preferably supporting a Senior Administrator.
* Experience in a post-secondary educational institution will be given preference.
* Familiar with university and broader public sector policies and procedures.
* Detail-oriented, well-organized, focused and goal-oriented, with both initiative and energy.
* Superior computer skills with MS Office (Word, Excel, Access), electronic calendar, internet research, file management systems and other platforms (e.g., Zoom, SharePoint, OneDrive).
* Experience using Trent-specific software (e.g., Colleague, Drupal, etc) an asset.
* Ability to organize and prioritize tasks using initiative, sound judgment with a high level of professionalism.
* Experience in managing the administrative tasks for special projects, and the ability to work within tight timelines.
* Experienced in handling sensitive and confidential situations and issues.
* Familiarity with contractual agreements and other legal documents.
* Demonstrated ability to interact comfortably, tactfully, and effectively with internal and external constituencies.
* Adept at problem solving and excellent judgment in situations requiring initiative and tact.
* Excellent interpersonal, verbal, and written communication skills.
* Demonstrated ability to work independently.
* Demonstrated skills in, and commitment to, exemplary customer service and continuous improvement.

**Job Evaluation Factors:**

##### Analytical Reasoning

* Must adapt methods to resolve problems in a fast-paced environment with continually changing priorities. Responsible to ensure that all reporting guidelines are met; encouraging the staff to complete the reports and submit them on time. Need to multi-task and prioritize own work in an environment that has diverse components and competing priorities due to the scope of the Financial Services portfolio as well as tight timelines in an office where there are no other administrative staff.

Example:

Tracking of Financial Services departmental expenses and comparison to approved budget, reconciling, and investigating anomalies and errors on a timely basis. Question appropriate staff with regards to any findings, request corrections if warranted, and match to appropriate documentation. Request appropriate transfers and advise the AVP of budgeted amounts remaining after taking into consideration encumbrances and known expenditure requests.

##### Decision Making

* Daily priority setting, weekly/monthly workflow schedules, correspondence, and committee coordination work are completed independently. AVP and Directors calendar scheduling and office management duties including purchasing office supplies are completed independently.
* Anticipating the AVP’s and Directors’ workload through monitoring and reviewing incoming email, correspondence, meeting requests and training to provide background materials in advance of meetings.
* Decide which issues need to go to the AVP and/or Directors for consultation, advice, and which can be handled without the AVP or Directors and by whom.
* Initiate new ideas to make minor improvements to Financial Services policies and procedures.
* General review of contractual agreements and management of relationships with bank, investment managers and custodians.

##### Impact

* Not keeping the AVP or Directors informed of relevant issues can lead to major problems, miscommunication and erosion of trust in Financial Services by other departments. Adversely, inundating the AVP and Directors with too much information can impair their ability to deal with the priorities of Financial Services and of the University properly.
* Responsible for tracking of timelines/deadlines for items such as government funding agreements and report backs, Board of Governors and Committee reports, complaints, meeting action items, AVP priorities, investment manager and custodial agreement changes, and other sensitive and confidential documents etc. Undetected errors can have a wide range of negative effects to Financial Services and the University from seeming incompetent, to loss of valuable time for project advancement/approval, to being incompliant with MCU requirements or other legislation, or loss of potential funding for the University.
* Failure to maintain accurate accounting of Financial Services departmental budgets could lead to overspending or insufficient funds available for key Financial Services initiatives and priorities.

##### Communication

Internal:

* AVP Finance and Directors and their direct reports: Work closely with them to inform them of the AVP’s and Directors’ requirements, discuss issues/problems, presentations and reports and reminders of actions required by them.
* Other University departments: Coordinate meetings, draft agendas, compose emails, memos, reports, forms, university-wide communiqués, take meeting minutes, write and post content on the website, follow up on items raised.
* University Secretariat: Coordinate annual update of signing authorities for banking, investment manager and custodial agreements,
* Executive Assistant to the VP Finance and Administration: Exchange of information, coordinate meetings, assess priorities.

External:

* MCU – sending reports and submissions of information based on their requirements.
* COU/COFO – exchange of information and submission of survey responses.
* Bank, investment managers and custodians – exchange of information, update to agreements and/or processes and signing authorities.
* Consultants, lawyers, vendors who have dealings with the university, usually to coordinate meetings, exchange of documents, reports, processing of fees.

##### Motor/ Sensory Skills

* Typing – typing of minutes, reports, letters, emails, etc.
* Writing by hand – taking minutes during meetings, etc.
* Requires attention to detail while coordinating multiple schedules.
* Requires multi-tasking ability.

##### Effort

Mental:

* Sustained concentration: Taking meeting minutes - sitting in one spot for at least an hour at a time listening and recording, which requires a high degree of focus and sustained concentration. There is a great need of comprehension for the items being discussed and the ability to instantly filter out irrelevant and sensitive information.

Physical:

* Sitting for extended periods of time during meetings or while at the computer and typing.

##### Working Conditions

Physical:

* Sitting at a computer, typing for long periods of time on a daily basis.
* Hand writing for more than an hour at a time while taking meeting minutes.

Psychological:

* Interruptions – there are interruptions constantly and the need to refocus on priorities continually.
* Dealing with complaints/frustrations of other staff, especially due to budgetary constraints or staffing issues.