**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Graduate Finance Officer

**Job Number:** A-322

**NOC:** 1221

**Band:** 8

**Department:** School of Graduate Studies

**Supervisor Title:** Dean, Graduate Studies

**Last Reviewed:** June 28, 2016

**Job Purpose**

Under the general direction of the Manager, Office of the Dean of Graduate Studies, the Graduate Finance Officer is accountable for the administration of internal and external (provincial and national) scholarship competitions, and award programs. The Graduate Finance Officer is responsible for the administration of the School of Graduate Studies bursary program including bursaries funded from university, government and privately endowed funds. The Graduate Finance Officer is accountable for the allocation of entrance scholarships from university, government and privately endowed funds. The Graduate Finance Officer coordinates issues related to student accounts, Research Fellowship Awards, develops and authorizes payment plans, agreements, and coordinates externally funded student invoicing. Prepares and produces financial reports as required for external agencies to ensure University compliance with external agency’s regulations for scholarship awarding and payments. Interacts with various departments within the University to coordinate scholarship payments, bursary allocations, supervisor funded payments, and scholarship information sessions for the financial benefit of graduate students.

**Key Activities**

**Scholarships and Bursaries**

1. The Graduate Finance Officer is the designated Scholarships Liaison Officer for funding programs such as Tri-Council Agencies, the Ontario Graduate Scholarships program, the Queen Elizabeth II Scholarship in Science and Technology, the Ontario Trillium Scholarships and other major external granting agencies.
2. Manages University scholarship programs for incoming and continuing graduate students. Liaises with external agencies including the Ministry of Training, Colleges and Universities, multiple departments within the Natural Sciences and Engineering Research Council of Canada, Social Sciences and Humanities Research Council of Canada, Canadian Institute of Health Research, Council of Ontario Universities, and establishes relationships with many other external organizations offering graduate scholarships such as: Ontario Confederation of University Faculty Associations, Rhodes Scholarships, Mackenzie King, Trudeau Foundation, Canadian Breast Cancer Foundation.
3. Accesses secure Tri-Council Agency sites and downloads scholarship applications. Posts scholarship adjudication results to the Government of Canada Research Portal by Tri-Agency deadlines. Submits award holder confirmations of ongoing eligibility reports, award holder progress reports and exit surveys reports to Tri-Agency. Tracks awardees academic progress, financial and registration status.
4. Prepares, and submits year-end annual reports for the Ontario Trillium Scholarship, Ontario Graduate Scholarship and Queen Elizabeth II Science and Technology Scholarship to Ministry of Training, Colleges and Universities in a timely and accurate manner.
5. Coordinates, administers and reports on all NSERC IPS awards. Ensures compliance with award criteria and collaborates with Financial Accounting to confirm receipt of industry funds for award.
6. Responsible for reporting of scholarships to the MTCU via the Ministry’s Bursary Recording System, working with the Ministry over multiple financial periods to properly record scholarship awards which could impact a student’s financial eligibility for OSAP.
7. Manages the receipt and processing of all external competition applications, reviewing for completeness, adhering to complex eligibility and procedural criteria. Provides feedback and suggestions to improve strength of applications.
8. Determines application eligibility and calculates eligibility requirements (grade point averages) for scholarship applications as per granting agencies criteria and uses judgment to ensure accurate assessment of academic performance for the benefit of faculty adjudication.
9. Assists with the drafting, development and implementation of policies and procedures for the administration of scholarship competitions and bursary awarding. Monitoring for best practices for efficiency and fairness
10. Facilitates the adjudication of graduate scholarship competitions at the departmental and University level by chairing university-level decision-making bodies, such as the Graduate Scholarship Committee.
11. Organize, market, and host scholarship information sessions and workshops in Peterborough and Durham. Educate students and faculty about policy changes, and coach students on the required elements of a successful scholarship application. Analyze past scholarship application performance, identify areas for improvement and implement strategies to address weaknesses and increase success rates. Research and promote scholarship opportunities to graduate students and faculty, contacting students to promote their participation in scholarship opportunities.
12. Develop, market and distribute internal university scholarship deadlines. Engage faculty in participating in workshops, and involve Career Centre and Academic Skills with various School of Graduate Studies events that educate Trent undergraduate and graduate students in funding opportunities and application processes.
13. Ensure all interactions with students, faculty and co-workers, via telephone, email and in person meets high standards of consistency, timeliness, fairness and promotes the overall vision of the School of Graduate Studies.
14. Co-ordinates communication of University award outcomes to departments, faculty and senior administrators for identifying graduate student support opportunities, as a performance indicator and to support recruitment conversion and program marketing activities. In recognition of graduate student success, organizes a yearly graduate scholarship recipient reception. Assists in the announcement of awards and coordination of press releases.
15. Responsible for ensuring award holder and institution compliance to the Memorandum of Understanding on the Roles and Responsibilities in the Management of Federal Grants and Awards established by the Tri-Council; Advises Restricted Funds Accountant (Financial Services) when scholarship funds are expected and coordinates the distribution of funds to scholarship recipients.
16. Contact students who have been offered major scholarships and admission to Trent University as a conversion initiative.
17. Represents the School of Graduate Studies representative and collaborates with the External Relations & Advancement Office for the development and implementation of new graduate awards, and bursary funding strategies, terms of reference creation and payment procedures.
18. Monitors and tracks activity within the graduate scholarship and bursary accounts to ensure accuracy, availability of funds for bursary allocation, and entrance scholarship distribution.
19. Manages the bursary assistance program for the School of Graduate Studies which includes allocation of graduate bursaries from endowments and trusts. Responsible to create a graduate bursary application, receive applications, process, assess, allocate funds and advise graduate students of results in a timely manner.
20. Responsible for matching of donor funds to bursary applicants to ensure funds are appropriately distributed.
21. Produces bursary allocation reports and submits to senior university administration for budgeting purposes.
22. Promotes the availability of bursaries to graduate students, communicates application deadlines and assist students with their application if requested. Responds to all bursary inquiries regarding terms of reference and eligibility.
23. During the bursary assessment process, identify potential concerns a student is having within their program and or personally, and using judgement to direct students to campus supports. Maintains confidentiality and sensitivity to all student’s personal circumstances.
24. Collaborates with External Relations and Advancement for their donor recognition purposes in relation to entrance scholarships, bursary allocations and with matching funding obligations for OGS and QEII-GSST.
25. Liaises with the Financial Aid Office and Trent International Program office regarding shared funds. Requests bursary, credit and refund cheques as required, which requires regular liaison with the Financial Services office, and the Office of Research, travelling between offices to deliver financial forms, and pick up scholarship, credit, bursary, RFA cheques.
26. Liaises with internal offices such as the finance office and the ministry to record all student funding including government grants which may affect's tuition rates
27. Ensures the School of Graduate Studies adherence to relevant policies, both internal and external*.*
28. Maintains records on scholarship and bursary competitions and awards. Keeps statistical results and prepares statistical reports as required.

**Student Finance**

1. The Graduate Finance Officer manages, monitors and processes Supervisor funded support to graduate students, communicating with Program Offices, working closely with faculty, the Restricted Funds Accountants (Financial Services), and Office of Research to ensure Research Fellowship Awards are dispersed in a timely manner and according to policies.
2. Coordinates collections of student fees by facilitating payroll deduction agreements with graduate students In each of the three terms (Fall, Winter and Spring), manages student accounts by reviewing all student accounts throughout each term, applying late charges, contacting all students with a past due balance by email promoting a bursary application, payroll deductions, payment plans and payment of arrears.
3. Manages student access to MyTrent when students are in arrears and makes recommendations to the Dean of Graduate Studies regarding student withdrawal for financial reasons. When necessary, forwards student account files to Financial Services for collections when all efforts to establish payment of past due tuition fees have been exhausted.
4. Responsible for the generation of manual student invoices for externally funded students and establishing a relationship with funding agencies so the process is completed in a timely manner. Ensures the payments received are credited to the student account appropriately.
5. Responsible for ensuring student scholarships, awards and funding are recorded in the student information system. Ensures that appropriate notations of scholarships and awards are recorded and appear on the student transcript according to policies.

**Other Duties**

1. Represents the University at local, provincial, and federal government workshops, annual meetings, and conferences related to graduate student support (e.g. OURA, Federal granting council meetings) as requested by Dean or Manager.
2. Works with the Information Technology Department and the Registrar’s Office to implement and maintain “MyRecords” system for graduate students as it pertains to the Financial Aid Module and delinquent account status.
3. Participates in annual financial audit in relation to scholarships and bursaries.
4. Participates in creation and editing of academic calendar, handbooks, and other graduate studies publications.
5. Other related duties as assigned which do not account for more than 5% of the total duties.

**Qualifications**

1. Honours Bachelor’s degree (required) in a related field.
2. Three to five years of related experience, preferably in an academic or government setting.
3. Excellent working knowledge of Windows, Microsoft Office (particularly, MS Word, Excel, Access and Powerpoint), and a student information system.
4. Experience with computer network environments, Internet, and web browsers required.
5. Ability to critically read and interpret documents and policies related to terms of agreements, financial obligations, and legal obligations.
6. Excellent verbal and written communication skills required including experience speaking to small and large groups.
7. Excellent working knowledge of Trent’s graduate programs.
8. Excellent ability to interact professionally and effectively with all/diverse constituencies of the University community, as well as with external contacts.
9. Proven ability to work both independently and as part of a team in a complex and multifaceted work environment.
10. Excellent organizational and time management skills to deal with multiple demands at one time and changing priorities.
11. A clear understanding and demonstrated abilities for diplomacy, compassion and confidentiality.
12. Analytical judgement to analyze individual student’s situations and problem solve.
13. Strong knowledge of budgetary procedures and meticulous attention to detail.
14. A working knowledge of basic accounting principles is helpful.