#### Trent University LogoOPSEU JOB DESCRIPTION

**Job Title:** Graduate Finance Officer

**Job Number:** A-322 | VIP: 1394

**Band:** OPSEU- 8

**NOC:** 1221

**Department:** School of Graduate Studies

**Supervisor Title:** Director, Graduate Studies

**Last Reviewed:**  October 14, 2022

#### **Job Purpose:**

The Graduate Finance Officer is responsible for promoting and coordinating all activities related to graduate scholarship competitions and award programs on behalf of the University including internally funded awards as well as major external awards (federal and provincial). The Graduate Finance Officer is the School of Graduate Studies designated Scholarship Liaison Officer to all external granting agencies. The incumbent oversees the implementation of policies and regulations related to awards management and is responsible for monitoring eligibility, coordinating the activities of the Graduate Scholarships Committee, communicating funding decisions, promoting award opportunities to students and providing expert advice. The incumbent provides a high level of customer service to a variety of stakeholders while balancing multiple deadlines and priorities. S/he is a liaison with external agencies and coordinates processes related to applications and scholarship decisions on behalf of the University.

#### Key Activities:

***Scholarship & Award Administration:***

1. Provides expert advice and guidance to applicants, graduate programs, staff and faculty members concerning the identification of scholarship opportunities, eligibility criteria for award programs and on the implementation and interpretation of internal and external program regulations and application instructions to ensure the highest success rate for Trent University applicants in graduate award program competitions.
2. Administers University scholarship programs for incoming and continuing graduate students. Liaises with external agencies including the Ministry of Colleges and Universities, Tri Council and establishes relationships with other external organizations offering graduate scholarships as required.
3. Coordinates activities for the Graduate Scholarships Subcommittee. In collaboration with the Dean of Graduate Studies assigns committee members to various scholarship committees, organizes training for committee members as required, coordinates committee meetings and provides guidance to faculty on the adjudication process and expectations for each competition. Works closely with the Dean of Graduate Studies and makes recommendations to resolve committee related challenges that may arise.
4. Provides recommendations to the Dean of Graduate Studies on provincial awards allocations based on university quota and the results of the internal adjudication process.
5. In collaboration with the Director, Graduate Studies accesses secure Tri-Council Agency sites. Downloads scholarship applications and submits scholarship adjudication results as necessary by the appropriate deadlines. Responsible for reviewing all applications for completeness and ensures that applicants meet complex eligibility criteria. Prepares and submits required reports to external agencies as required.
6. Track awardees academic progress, monitors financial and registration status to manage issues related to ongoing awardee eligibility.
7. Manages the receipt and processing of all external competition applications. Reviews for completeness and ensures that applicants meet complex eligibility criteria. Provides feedback and suggestions to improve strength of applications.
8. Responsible for the reporting of scholarships to the MTCU for the purposes of OSAP eligibility via the Ministry’s Bursary Recording System.
9. Assists with the drafting, development and implementation of policies and procedures as they relate to the administration of graduate scholarship competitions. Monitors best practices for efficiency and fairness.
10. Coordinates scholarship information sessions in collaboration with Director, Graduate Studies, members of the graduate studies team, university departments, and faculty speakers. Responsible for planning and marketing such events at both the Peterborough and Durham campus. Participates in the development of graduate scholarship resource materials for the Trent community.
11. Responsible for tracking scholarship applications and performance across all awards to identify areas for improvement and implement strategies that will increase success rates. Continually evaluates internal policies and processes to identify areas for improvement and increase efficiencies.
12. Drafts language and communications to advertise funding opportunities for students through both the School of Graduate Studies website and through email communications to graduate students and graduate programs.
13. Co-ordinates communication of award outcomes to graduate students and departments. Participates in activities related to the recognition of scholarship holders.
14. Works in collaboration with the External Relations & Advancement Office and the Director, Graduate Studies to support the development of Terms of Reference and application procedures for new graduate awards.
15. In collaboration with the Financial Services team monitors activity within the graduate scholarship accounts to ensure accuracy. Advises Financial Services when scholarship funds are expected and coordinates the distribution of funds to scholarship recipients when funds are received. Ensures institutional compliance with roles and responsibilities related to the management of federal grants and awards.
16. Works in collaboration with External Relations & Advancement Office and Financial Aid to appropriately match eligible graduate students with available donor award and bursary funds to ensure that funds are appropriately distributed.
17. Collaborates with Advancement to provide student information required for donor recognition purposes.
18. Maintains accurate and organized records for all scholarships and awards. Prepares reports and provides data as required.

***Student Finance:***

1. The Graduate Finance Officer oversees all requests and processing to add supervisor financial support to graduate student accounts. Communicates and works closely with faculty, graduate programs, and Research Finance to ensure Research Fellowship Awards are dispersed in a timely manner and according to approved policies.
2. Coordinates the monitoring of outstanding student accounts in collaboration with the Graduate Administrative Assistant. Works to mitigate risk to the university by monitoring account balances, sending email reminders to students, and working with students to develop payment plans. Coordinates with the Graduate Records and Registration Officer to restrict access to MyTrent and registration in situations where outstanding account balances have not been addressed.
3. Makes recommendations to the Director, Graduate Studies and Dean of Graduate Studies regarding student withdrawal for financial reasons. Oversees identifying student account files to be forwarded to Financial Services for collections when all efforts to establish payment of past due tuition fees have been exhausted.
4. Responsible for ensuring student scholarships and awards 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 approved policies.
5. Collaborates with Director, Graduate Studies and Financial Aid to support the Financial Aid team in completing graduate bursary assessments by providing guidance, making recommendations in relation to donor accounts, and confirming graduate student information as required.
6. In collaboration with Director, Graduate Studies maintains entrance award tracking by graduate program and student and oversees the allocation of funding. In collaboration with Advancement monitors entrance award accounts. Assists with the allocation of other graduate funding to student accounts when required.

***Other Duties:***

1. Represents the University at local, provincial, and federal government workshops, annual meetings, and conferences related to graduate student support as requested by the Director, Graduate Studies.
2. Participates in annual financial audit in relation to scholarships and awards as required.
3. Participates in creation and editing of academic calendar, handbooks, and other graduate studies publications.
4. Represents School of Graduate Studies at graduate student orientation and recruitment events as required.
5. Takes responsibility for developing and maintaining Standard Operating Procedure documents for all processes within area of responsibility.
6. Provides general assistance to the Graduate Studies office team at peak times (including reception and responding to general inquiries).
7. Ensures 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.
8. Assists with training and oversees work of student assistants.
9. Other related duties as assigned which do not account for more than 5% of the total duties.

#### Education Required:

* Honours Bachelor’s Degree (4 year).

#### Experience/Qualifications Required:

* Three to five years of related experience, preferably in an academic or government setting.
* Proficient in the use of Microsoft Office (particularly, MS Word, Excel, and PowerPoint). Experience and proficiency using an automated student information system.
* Excellent verbal and written communication skills required including experience speaking to small and large groups.
* Thorough knowledge of Trent’s graduate programs and available scholarship and award opportunities.
* Excellent ability to interact professionally and effectively with a variety of internal and external stakeholders.
* Proven ability to work both independently and as part of a team in a complex and deadline driven working environment.
* Excellent organizational and time management skills to deal with multiple demands at one time and changing priorities.
* A clear understanding and demonstrated ability to maintain confidentiality.
* A working knowledge of basic accounting principles would be considered an asset.