

Position Description Form (PDF)

College: Sir Sandford Fleming

Incumbent's Name: VACANT

Position Title: Student Awards Officer

Payband: H

Position Code/Number (if applicable):

Scheduled No. of Hours: ____35____ per week

Appointment Type: 12 months Less than 12 months (please specify # months: _____)

Supervisor's Name and Title: Lori Russell, Manager, Financial Aid & Student Fees

Completed by: Lori Russell

Date: January 21, 2020

Last Revision:

Signatures:

Incumbent:
(Indicates the incumbent has read and understood the PDF)

Date:

Supervisor:

Date:

Instructions for Completing the PDF

1. Read the form carefully before completing any of the sections.
2. Answer each section as completely as you can based on the typical activities or requirements of the position and not on exceptional or rare requirements.
3. If you have any questions, refer to the document entitled "A Guide on How to Write Support Staff Position Description Forms" or contact your Human Resources representation for clarification.
4. Ensure the PDF is legible.
5. Responses should be **straightforward and concise using simple factual statements.**

Position Summary

Provide a concise description of the overall purpose of the position.

The Student Awards Officer (SAO) is responsible for developing and assisting with the administration of all internal and external need and merit based awards programs at Fleming College.

Working closely with the Financial Aid Advisors (FAA) and Financial Aid Officers (FAO), the incumbent will ensure ministry guidelines and policy are adhered to with the adjudication of all bursary and award programs, including Bursaries for Students with Disabilities (BSWD), First Generation and Indigenous bursaries. They will be responsible for updating the Bursary Recording System (BRS) for Ministry reporting.

The incumbent will be responsible for the development and administration of the on-campus work study program. They will work closely with their manager, financial aid advisors, finance, payroll, and student experience to ensure the development of a robust employment program that assists in providing financial assistance and valuable work experience to Fleming students in financial need.

Working closely with the marketing events coordinator, the SAO will assist in the development and planning of award specific events that bring students, donors and community members together.

The SAO will be responsible for awards outreach and will develop and administer a comprehensive communications plan for students. This will include: working with the web team to enhance and cyclically update information on the external website, working with the Deans/chairs of each faculty for merit based awards and liaising with advancement to ensure we have the most up to date awards information to provide to students and stakeholders.

The SAO will be the subject matter expert on awards policies and procedures. They will build policy and procedures in relation to the adjudication of all award programs, they will liaise with the advancement team and the faculties to ensure that academic policy aligns with the ministry guidelines for merit based bursaries, awards and scholarships

Duties and Responsibilities

Indicate as clearly as possible the significant duties and responsibilities associated with the position. Indicate the approximate percentage of time for each duty. Describe duties rather than detailed work routines.

	Approximate % of time annually*
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<p>Financial Aid Award Programs Deliver provincial, federal and college bursary, scholarship and awards programs. Meeting with students to discuss their financial plan and provide solutions, often required to have difficult conversations with students in regards to funding issues due to students' academic performance, course load or OSAP restrictions.</p> <p>Allocation of needs based awards to FAO and FAA's. Will work with the business analyst to run queries for donor awards selection process. Queries will generate the application pool and the SAO is responsible for reviewing the applicants and choosing the successful candidate. For merit based awards the SAO will work with deans/chairs on the selection, providing each faculty with an applicant pool that meets the awards criteria.</p> <p>Adjudication of BSWD, First Generation and Indigenous bursaries.</p> <p>Monitor statistical information and make recommendations to the Manager on the delivery of financial aid award programs to increasing numbers of students.</p> <p>Oversee development of communications through departmental brochures from letters, handouts, mass emails to students and "MyCampus" announcements on behalf of the Financial Aid and Awards Office.</p> <p>Attend conferences and participate in work groups.</p> <p>Oversees the development and implementation of workshops regarding awards, financial literacy and alternative financial aid programs to students, parents, teachers and counsellors.</p> <p>Oversees electronic online student financial profile, development, edits, trains staff, develop and maintain user manual.</p> <p>Maintain external scholarship programs</p>	40%
<p>Policy & Procedures Liaises with the Advancement office, finance, faculty and staff to develop award policies, procedures and guidelines and ensures effective promotion, processing and distribution of awards.</p>	15%
<p>Assist with implementation, revision and maintenance of bursary, awards and scholarship processes and systems.</p>	15%
<p>Approve distribution of bursary and scholarship funding to eligible clients according to internal and external policies and procedures.</p>	10%
<p>Enters and maintains student awards records on internal and external systems.</p>	10%
<p>Researches and provides advice on external award opportunities.</p>	5%
	100%

<u>Other Duties as assigned</u>	5%

- * To help you estimate approximate percentages:
- | | | |
|---------------------|---------------------|---------------------|
| ½ hour a day is 7% | 1 hour a day is 14% | 1 hour a week is 3% |
| ½ day a week is 10% | ½ day a month is 2% | 1 day a month is 4% |
| 1 week a year is 2% | | |

1. Education

A. Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study. Do not include on-the-job training in this information.

- | | | |
|--|--|--|
| <input type="checkbox"/> Up to High School or equivalent | <input type="checkbox"/> 1 year certificate or equivalent | <input type="checkbox"/> 2 year diploma or equivalent |
| <input type="checkbox"/> Trade certification or equivalent | <input checked="" type="checkbox"/> 3 year diploma / degree or equivalent | <input type="checkbox"/> 3 year diploma / degree plus professional certification or equivalent |
| <input type="checkbox"/> 4 year degree or equivalent | <input type="checkbox"/> 4 year degree plus professional certification or equivalent | <input type="checkbox"/> Post graduate degree or (e.g. Masters) or equivalent |
| <input type="checkbox"/> Doctoral degree or equivalent | | |

Field(s) of Study:

Bachelor of Arts, Business or communications degree or diploma,, or other related fields of study

B. Check the box that best describes the requirement for specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirement that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

No additional requirements

- Additional requirements obtained by course(s) of a total of 100 hours or less
- Additional requirements obtained by course(s) of a total between 101 and 520 hours
- Additional requirements obtained by course(s) of a total of more than 520 hours

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of year of experience, in addition to the necessary education level, required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or on-the-job training occurs after the conclusion of the educational course or program.

- Less than one (1) year
- Minimum of one (1) year
- Minimum of two (2) years

X Minimum of three (3) years

Experience in an awards environment. Awareness of Provincial issues regarding awards within the college system. Creative problem solving, analytical, decision making skills, superior judgement, tact and diplomacy. Thorough knowledge of government, College, and award programs. The ability to analyze need, adjudicate achievement based awards, and interpret and apply complex policies. Excellent communication and interpersonal skills, including writing, editing, facilitating and presentation delivery. Proficiency in MS Office and Banner Student System. Working knowledge of HTML and electronic publishing software an asset.
Proven knowledge and ability to implement OSAP Ministry policies and procedures and institutional award programs.

Minimum of five (5) years

Minimum of eight (8) years

3. Analysis and Problem Solving

This section relates to the application of analysis and judgement within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgement required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#1 regular & recurring

Key issue or problem encountered.

Student has applied for financial assistance (bursaries, awards, but their bursary assessment falls short of their financial need. The student is anxious and concerned about their ability to afford their post-secondary costs.

How is it identified?

Issues are not readily identifiable. Each situation is unique and considerable investigation is required from multiple sources (ie bursary application, OSAP application, MCU policy, eligibility, review guidelines) to determine the problem and suggest possible resolutions. Analys all of the students resources and costs and come up with a solution to close the gap so the student can continue their education.

Is further investigation required to define the situation and/or problem? If so, describe.

To determine areas in the bursary application that could be recalculated, the incumbent must examine how the student completed their bursary application (e.g. Ontario residency, living situation, Income, student category, distance from school). Uses the MCU online OSAP portal to review OSAP

Explain the analysis used to determine a solution(s) for the situation and/or problem.

funding to ensure all appeals have been done, work with the FAO's and FAA's to exhaust this resource. The interpretation of a range of broad government policy/eligibility and assessment guidelines is crucial to this role and has a significant impact on a student's ability to access all funding assistance offered.

-The incumbent must have a clear understanding of the policy frame work for adjudicating our multiple bursary, awards and scholarship programs: Tuition Set Aside Funding, First Generation Bursary, Indigenous Student bursary, BSWD funding, donor awards. They need to also have working knowledge of OSAP policy, eligibility and assessment criteria and the OSAP Review Manual and Processing Guidelines and must be able to recommend possible reviews to assist students in the wide variety of scenarios that are presented each semester for all funding we provide at Fleming. Through discussion with the student, the incumbent identifies errors or omissions in the application/s and makes the necessary correction(s). Arranges for the documentation required to substantiate the amended application.

The incumbent uses their sound understanding of funding policies, processing guidelines and assessment criteria to identify opportunities to enhance the student's funding opportunities through the recommendation of appeals which are unique to the student's circumstance. Each appeal requires supporting documentation that must be examined by the incumbent to reach a decision. Since funding guidelines are broadly defined in this area, and often incomplete or conflicting, the incumbent uses sound, independent judgement to support their decision when adjudicating all appeals.

Where the incumbent determines that funding falls short of student's need or where the student in fact does not qualify for funding, the incumbent will determine the level of student crisis and counsels the student and/or family to a successful solution which explores all financial options available to supplement the student's resources including external and internal awards, bursaries, on-campus work study employment, student lines of credit or emergency bursary funding.

Recommending alternative financial resources is imperative to the incumbent's role to maintain student retention.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

Databases, policy and procedure manuals, internet, historical records, gift agreements, OSAP guidelines and manuals etc.

3. Analysis and Problem Solving

#2 regular & recurring

Key issue or problem encountered

A student has been evicted from their home and/or do not have sufficient resources to pay their rent and they don't have any money left.

How is it identified?

The student will arrive in the financial aid/award office looking for an immediate solution.

Is further investigation required to define the situation and/or problem? If so, describe.

Yes, significant investigation is required. The incumbent is required to meet with the student to understand the details of their specific situation. Are there others involved, how did the eviction come about. What are the student's expectations in terms of outcome. The incumbent will also review with the student what financial resources they may have already received and they will discuss how those resources have been spent.

Explain the analysis used to determine a solution(s) for the situation and/or problem.

Based on the outcome of the above discussion, if there is an immediate/serious underlying circumstance, the student will be referred to the counselling department for guidance. With respect to the financial circumstance, the student will be required to provide a budget outlining their most immediate need and what resources they will require to see them through to the end of the semester – this will determine whether the need is genuine or if there is a resource management issue. – are there inconsistencies in the information provided – are the expenses presented valid. A review of the student's OSAP application will occur to see if loans have been maximized; bridge financing may be provided if appropriate; and/or a bursary may be provided to assist. Where resource management is an issue a review of budgeting and/or referral for credit counselling may also be appropriate

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

Past practice, department guidelines and consultation with colleagues are all sources of information for solution.

#3 regular & recurring

Key issue or problem encountered	Works with the FAO and counsellors on developing and streamlining award adjudication, for example the BSWD program: leading brainstorming sessions, implementation of changes, providing next steps to unresolved problems etc. Analyzes BSWD applications and adjudicates government funding based on individual student needs and government policy. Also, leads the communications to the appropriate stakeholders (college wide, student, RO, counsellors, etc.) that are impacted by internal or external policy and procedure changes.
How is it identified?	Incumbent initiates team meetings regarding student financial profile, awards, bursary, scholarship program, BSWD and financial literacy workshops
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent determines pertinent information to discuss independently or via prior discussion with the Manager.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	<p>As required the incumbent leads brainstorming sessions with the team to resolve a service or case-by-case issues. The incumbent is required to ensure the team is productive and comes to a consensus within a reasonable time frame.</p> <p>The incumbent develops a plan of action based on their knowledge and expertise and delegate appropriately.</p> <p>Prior to team meetings the incumbent stays abreast of Institutional and Ministry changes to process. The incumbent reviews current practice, determines how best to implement to cause the least disruption. Liaise with Ministry contacts to verify as appropriate. Roll out to staff, monitor implementation and change as required.</p>
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	<p>Provincial meetings.</p> <p>Ministry documentation.</p> <p>Knowledge and experience. Past practices.</p>

#1 occasional (if none, please strike out this section)

Key issue or problem encountered	Perspective student enquiring about options to fund their education.
How is it identified?	Student calls independently or is referred by the Registrar's Office

Is further investigation required to define the situation and/or problem? If so, describe.

-determine funding resources available to student (present and possible)

Explain the analysis used to determine a solution(s) for the situation and/or problem.

-verify present funding sources and determine if additional resources might be available
Incumbent must be creating in offering solutions; Incumbent must stay current of resources available. Determine solutions on a case-by-case basis assessing students strengths in preparing award applications.

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

- to verify present
-internet, institutional and government policy and procedures
liaise with faculty

#2 occasional (if none, please strike out this section)

Key issue or problem encountered

Award Criteria evaluation; low performance of donor or institutional awards

How is it identified?

-award cannot be disbursed due to no qualified candidate

Is further investigation required to define the situation and/or problem? If so, describe.

-determine whether qualified candidates exist

Explain the analysis used to determine a solution(s) for the situation and/or problem.

-determine if release of information available about award was sufficient
-determine if award criteria is reasonable/appropriate
-determine if alternate criteria would be reasonable/appropriate

Situations where we have not been able to distribute awards because we cannot find a qualified student. Incumbent actively works with faculty to seek candidates. The incumbent analyzes the criteria to prepare recommendations for the Advancement Office and/or donor to consider; was our timing wrong; determine success of advertisement; is the gift to restrictive? Statistically analyze present and historical student demographics and GPA to determine viability of award criteria and recommend gift agreement changes to the advancement office and donor for example Roger Parly Award

What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).

-gift agreements, student databases, other staff, Advancement office, established guidelines and policies

4. Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

Using the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

#1 regular & recurring

List the project and the role of the incumbent in this activity.

Distribution of set-aside funds.

Incumbent determines distribution of funds i.e. scholarship awards and bursaries etc. Based on trends last year

What are the organizational and/or project management skills needed to bring together and integrate this activity?

Assist Manager in determining guidelines, new and existing initiatives, and budget allocations to initiatives. Incumbent prepares a proposal and needs assessment to ensure fit with Ministry guidelines. Develop online application and application process.

List the types of resources required to complete this task, project or activity.

-historical award records, student demand, government regulations and initiatives, knowledge of resource levels

How is/are deadline(s) determined?

-by Manager and Ministry guidelines

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

-incumbent tracks overall spending of funds and notifies Manager and other staff of the status of the funding when appropriate

4. Planning/Coordinating

#2 regular & recurring

List the project and the role of the incumbent in this activity.

Development of on-line needs assessment process. Reviews and updates to reflect changes from the Ministry and internal policies.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

-planning and organizing regular meetings of involved staff- compilation, composition and editing of materials required- liaising with FAO and IT staff

List the types of resources required to complete this task, project or activity.

-present records and procedures, knowledge of new guidelines and changes to procedures

How is/are deadline(s) determined?

-IT availability, Ministry guidelines, Manager's input, academic calendar

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

Incumbent after consultation with Financial Aid and Awards staff recommend changes to Manager and then works with IT determines what is possible with available software and programmer availability – Manager drives project timelines-changes to government policies and procedures also drive changes.

#3 regular & recurring

List the project and the role of the incumbent in this activity.

Adjudication of Major Awards by Institutional Committees – incumbent chairs Committee

What are the organizational and/or project management skills needed to bring together and integrate this activity?

Must possess strong organizational and project management skills. Must be able to prioritize workload plus be aware of Committee members resources availability and demands on their time. Solicit and coordinate volunteers for committee, provide direction and advice, organize meetings, sets deadlines, provide guidelines and scoring rubric for adjudication.

List the types of resources required to complete this task, project or activity.

Liaison with co-workers and committee members, award guidelines and procedures, application knowledge, student applications, appropriate staff or key stakeholders, ministry and institutional and gift agreement guidelines, human rights policy on scholarships and awards.

How is/are deadline(s) determined?

Incumbent
 Government deadlines
 Award criteria
 Academic calendar

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

The incumbent independently problem solves any issues related to adjudication. Incumbent monitors progress, assist with additional information and replacing committee members when appropriate.

4. Planning/Coordinating

#1 occasional (if none, please strike out this section)

List the project and the role of the incumbent in this activity.

Tracking and reporting of budget expenditures to Ministry

What are the organizational and/or project management skills needed to bring together and integrate this activity?

-ability to maintain accurate records and documentation of expenditures in the government programs

List the types of resources required to complete this task, project or activity.

Government website, knowledge of government procedures, other staff input

How is/are deadline(s) determined?

-by government

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

-government institutes changes in policy and procedure and communicates these
 -example: online reporting of expenditures now in place

#2 occasional (if none, please strike out this section)

List the project and the role of the incumbent in this activity.

Liaises with the Special Event Coordinator in Marketing to develop, set-up, market and communicate Award Events to all stakeholders, including donors, students and faculty.

What are the organizational and/or project management skills needed to bring together and integrate this activity?

Must possess strong organizational and project management skills. Must be able to prioritize personal workload and manage several competing priorities at one time.

List the types of resources required to complete this task, project or activity.

-Award guidelines and procedures, application knowledge, student applications, appropriate staff or key stakeholders.

How is/are deadline(s) determined?

-government guidelines
-Award source
-incumbent

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.

-incumbent monitors progress, assists with additional info when required for Committee members, replacing members when appropriate, etc

5. Guiding/Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus on the actions taken (rather than the communication skills) that directly assist others in the performance of their work or skill development.

Though Support Staff cannot formally "supervise" others, there may be a requirement to guide others using the incumbent's job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks.

Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

Regular & Recurring	Occasional	Level	Example
<input type="checkbox"/>		Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	
<input type="checkbox"/>	<input type="checkbox"/>	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	

X	<input type="checkbox"/>	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	The incumbent provides information and guidance on an array of financial aid options to assist the student in achieving their academic goals. The incumbent creates solutions and guides the students on next steps when issues occur i.e. supporting documentation, completing applications etc. The incumbent will follow-up with students by arranging future appointments, initiate phone calls, emails etc.
<input type="checkbox"/>	X	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	The incumbent works with the FAO and FAA's to ensure our bursary and awards are adjudicated in a timely manner and assists in troubleshooting concerns. Translates and ensures adherence to all internal and external policies and procedures.
	<input type="checkbox"/>	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in the position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	Occasional (if none, please strike out this section)
The incumbent receives no daily instruction and is self-directed. Incumbent is aware of day-to-day responsibilities based on deadlines, guidelines, and internal policies and procedures and determines the work methods to manage their time effectively. At the beginning of special projects, objectives and deadlines will be discussed with the Manager.	

What rules, procedures, past practices or guidelines are available to guide the incumbent?

Support Staff PDF

Regular and Recurring	Occasional (if none, please strike out this section)
<p>College, university and department policies and procedures.</p> <p>Program calendars.</p> <p>Student handbook.</p> <p>MTCU OSAP Policy and Procedure Manuals.</p> <p>List serves.</p> <p>Freedom of Information and Protection of Privacy Act</p>	<p>External bursary/awards policy and procedures eg: BSWD</p>

How is work reviewed or verified (eg. feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional (if none, please strike out this section)
<p>The incumbent has significant freedom to carry out duties in accordance with procedures, policies and past practices that govern the delivery of awards programs. Work is reviewed and discussed with the Manager only if an exceptional or difficult situation arises.</p>	<p>External auditors review records every three years.</p>

6. Independence of Action

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor?	
Regular and Recurring	Occasional (if none, please strike out this section)
<p>The team would discuss/brainstorm challenges amongst themselves to determine appropriate solutions.</p> <p>The incumbent will work with the Advancement Office and/or donors regarding award/gift criteria.</p> <p>The incumbent will collaborate with faculty to promote awards.</p> <p>The incumbent liaises with the grad studies office to develop processes and seek resolutions.</p>	<p>Collaboration with committees organized by the incumbent to provide recommended award recipients.</p>

Describe the type of decisions that would be decided in consultation with the Supervisor.	
Regular and Recurring	Occasional (if none, please strike out this section)

Variations to policies and procedures, discrepancies, problems or difficulties in meeting deadlines. Unusual student situations that may become controversial or a public relations concern.	Emergency situations causing financial hardship for student.
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Describe the type of decisions that would be decided by the incumbent.

Regular and Recurring	Occasional (if none, please strike out this section)
<p>The incumbent uses their judgement to approve applications and appeals for financial assistance to ensure that decisions are defensible and comply with policies.</p> <p>The incumbent is required on a daily basis to independently decide on the most suitable course of action for the student, any necessary referrals and other issue related to financial aid.</p> <p>Independently based on experience, knowledge and stats prepare a recommendation to aid in the planning and implementation of the general bursary program.</p> <p>Participate and act as a resource on Provincial committees. Determine response to aid in the issues affecting financial aid policies and processes. If elected act as a chair for Provincial committees or working groups.</p>	<p>The incumbent would determine how much emergency financing to issue a student within the parameters and policies of the department. The incumbent will determine when consultation with the Manager is required.</p>

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which the position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfil the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency (D, W, M. I)*
How is it received?	How is it carried out?		

Support Staff PDF

<p>Seeking Financial Resources -student self-identifies by visiting or calling the office.</p>	<p>The incumbent asks appropriate questions, reviews documentation and interprets all information provided.</p> <p>The incumbent determines the best financial resources available for the student based on their individual need and eligibility for financial aid programs.</p> <p>The incumbent must draw on their knowledge of awards and gifts. Knowledge of bank and private financial aid and award programs. Knowledge of admissions/registration processes for two institutions.</p>	<p>Students / parents / third parties/ faculty/general public</p>	<p>D</p>
<p>Budgeting - Student self-identifies by visiting or calling the office or organized sessions.</p>	<p>Offer individual and group budgeting sessions to provide students with financial management skills.</p>	<p>Students</p>	<p>D</p>
<p>OSAP, work study, bursary applications and payroll - Electronic and hardcopy applications and supporting documentation.</p>	<p>Adjudicate OSAP applications.</p> <p>Adjudicate the bursary (internal) applications.</p> <p>Adjudicate work study applications. Processing payroll for those programs.</p> <p>Ontario Special bursary, part-time students.</p> <p>Bursary for students with disabilities. Collaborate with Disability Advisors to determine if request matches criteria.</p>	<p>Students</p>	<p>D</p>

Support Staff PDF

Ministry requests - Electronic, fax or hardcopy documentation.	Requests to follow-up on student status.	MCU	M
Financial Aid workshops - Manager via staff meeting, emails or verbally.	Requests to provide financial aid information to a group.	High schools. Open houses. Workshops Classrooms etc.	M

* D = Daily W = Weekly M = Monthly I = Infrequently

8. Communication

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section(s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D, W, M ,I)*
Exchanging routine information, extending common courtesy			

Support Staff PDF

<p>Explanation and interpretation of information or ideas</p>	<p>Communicate Ministry, college and university policies to students and families seeking financial assistance.</p> <p>Weekly Student Award Officer meetings – review process, brainstorm, procedures.</p> <p>Monthly staff meetings.</p> <p>Work closely to assist in achieving enrolment and retention objectives.</p> <p>Work with to support retention of at-risk students.</p> <p>Bursaries for Student with Disabilities.</p> <p>Discuss awards and gifts.</p>	<p>Students / parents / third parties</p> <p>Financial Aid colleagues</p> <p>Financial Aid staff</p> <p>Admissions, Registration, Financial Aid staff</p> <p>Counsellors</p> <p>Staff / students</p> <p>Advancement Office</p>	<p>D</p> <p>W</p> <p>M</p> <p>W</p> <p>W</p> <p>D</p> <p>D/W</p>
<p>Imparting technical information and advice</p>	<p>Training team members on internal and external systems required for the delivery of Financial Aid and Awards</p> <p>Provides clarity by interpreting and explaining OSAP policy and procedure. Incumbent required to determine the level of comprehension and gear the explanation to the audience.</p>	<p>Staff</p> <p>Students, faculty, parents, college staff, guidance counsellors</p>	<p>W</p> <p>D</p>
<p>Instructing or training</p>	<p>Conduct workshops to inform of financial assistance options i.e. mature student session, first generation students, classroom visits, school fairs</p>	<p>High school (parents nights)</p> <p>Community event/meeting or agencies i.e. Children’s Aid Society, Adult training.</p> <p>Recruitment Events i.e. Open Houses</p>	<p>M</p>

Obtaining cooperation or consent			
Negotiating			

* D = Daily W = Weekly M = Monthly I = Infrequently

9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D, W, M, I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1 - 2 hrs at a time	> 2 hrs at a time	Yes	No	N/A
Sitting	D			X	X		
Standing	D	X			X		
Walking	D	X			X		
Lifting full file boxes	I	X			X		

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If lifting is required, please indicate the weights below and provide examples.

Light (up to 5 kg or 11 lbs)

Files, supplies

Medium (between 5 to 20 kg or 11 to 44 lbs)

Full file boxes

Heavy (over 20 kg or 44 lbs)

10. Audio Visual Effort

Describe the degree of attention or focus required to perform tasks taking into consideration:

- the audio/visual effort and the focus or concentration needed to perform a task and the duration of the task, including breaks (eg. up to 2 hours at one time including scheduled breaks)
- impact on attention or focus due to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (eg. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Listening to a student explain their situation and circumstances. Speaking to a group i.e. mature students workshop, graduate study workshop etc regarding bursaries, options etc.	D M	X		
Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input type="checkbox"/> Usually <input checked="" type="checkbox"/> No The incumbent is often interrupted due to student or staff inquiries such that their attention is required to refocus on the most immediate need of the student or staff member making the inquiry.				

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Adjudicating applications, including Bursary for Students with Disabilities	D		X	

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
 Usually
 No The incumbent is often interrupted due to student or staff inquiries such that their attention is required to refocus on the most immediate need of the student or staff member making the inquiry.

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Bursary, scholarship and donor award fund set up – works in multiple systems to ensure that the correct item types are linked in each system for accurate distribution of funds.	Daily - 6 to 8 weeks during peak periods for the fall and winter semesters			X

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
 Usually
 No The incumbent is often interrupted due to student or staff inquiries such that their attention is required to refocus on the most immediate need of the student or staff member making the inquiry.

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11. Working Environment

Please check the appropriate box(es) that best describes the work environment and the corresponding frequency and provide an example of the condition.

Working Conditions	Examples	Frequency (D, W, M, I)*
<input checked="" type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below)		D
<input type="checkbox"/> accessing crawl spaces/confined spaces		
<input checked="" type="checkbox"/> dealing with abusive people	The incumbent experiences frustrated students who use derogatory or threatening language. I	
<input checked="" type="checkbox"/> dealing with abusive people who pose a threat of physical harm	Students who become extremely agitated and frustrated may physically move into the incumbent's 'comfort zone', either with physical gestures or by verbally threatening physical harm I	
<input type="checkbox"/> difficult weather conditions		
<input type="checkbox"/> exposure to extreme weather conditions		

Support Staff PDF

<input type="checkbox"/> exposure to very high or low temperatures (e.g. freezers)		
<input type="checkbox"/> handling hazardous substances		
<input type="checkbox"/> smelly, dirty or noisy environment		
X travel	Presentations in the community; Other campuses; workshops; fairs.	I
<input type="checkbox"/> working in isolated or crowded situations		
<input type="checkbox"/> other (explain)		

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