

CAAT Job Evaluation System for Non-Bargaining Unit Employees

Ontario Colleges of Applied Arts and Technology

The Job Fact Sheet Questionnaire (JFS) is used to gather information for job evaluation purposes for the Colleges= Administrative Staff, Part-Time Support Staff, Part-Time and Sessional Academic Staff positions. Please read each section carefully before completing.

The Education and Experience sections are to be completed by the College according to the College's recruitment standards.

Upon completion by an incumbent, the JFS is reviewed and, when necessary, adjusted by the position's Manager and the Senior Manager responsible for the position. Any changes to the JFS are to be reviewed with the incumbent prior to evaluation. The JFS is then submitted to the appropriate College official for job evaluation purposes.

The JFS is not finalized until it has gone through the job evaluation process and the results have been confirmed by the College. A copy of the finalized JFS will be provided the incumbent for information purposes and as a job description.

1. POSITION IDENTIFICATION

Position Title: Manager, Financial Planning & Analysis
Position Number:
Pay Band: 11
Incumbent:
Location/Campus: Sutherland
Division/Department: Finance
Immediate Supervisor (title): Director, Financial Services and Controllershship
Date of JFS: June 15, 2020
Last Evaluated: July 2, 2020

Type of Position:

- | | |
|----------------------------------------------------|---------------------------------------------------|
| <input checked="" type="checkbox"/> Administrative | <input type="checkbox"/> Part-Time Administrative |
| <input type="checkbox"/> Sessional Academic | <input type="checkbox"/> Part-Time Academic |
| <input type="checkbox"/> Part-Time Support | <input type="checkbox"/> Other |

I have read and understood the contents of the Job Fact Sheet (if completed by an incumbent):

Incumbent: _____ Date: _____

Recommended by:
Position's Manager: _____ Date: _____

Approved by:
Senior Manager: _____ Date: _____

POSITION SUMMARY

Provide a concise description of the position by identifying its most significant responsibilities and/or accountabilities.

Reporting to the Director, Financial Services and Controllershship, the Manager, Financial Planning and Analysis manages the day-to-day operations of the Budgets & Planning department. This position is responsible for the development, implementation and maintenance of the College's budget and forecast planning process. The Manager is responsible for financial analysis and reports to provide senior management with accurate and relevant information for decision making and reporting purposes.

In addition, provides support, guidance, training and solutions for the budgeting process and software. (Peoplesoft and Cognos)

The incumbent has responsibility for interpretation and compliance with Ministry policy in certain areas.

KEY DUTIES

Provide a description of the position's key duties. Estimate the percentage of time spent on each duty (to the nearest 5%). Add an extra page if necessary.

<u>KEY DUTIES</u>	<u>% OF TIME</u>
1. FINANCIAL PLANNING AND FORECASTING:	(45%)
<ul style="list-style-type: none">• Systematically develop and manage processes comprising the development of the annual budget and in-year forecasts.• Assess risks and assist budget managers with developing line item and cost centre budgets.• Prepare budget and forecast documents for the Director, Financial Services and Controllershship's review.• Assist in the preparation of the College's 5-year forecast.• Act as a resource and advisor to budget managers and College staff in the process of budget preparation, analysis and interpretation of financial results.• Assist budget managers with the development of budgets and forecasts for part-time staffing costs. Develop and maintain detailed salary and benefit estimates for all full-time staff and develop estimates for the costs of sick leaves, sabbaticals and other types of employee leaves.• Provide position and program costing upon request by departments.• Prepare presentations for various stakeholder groups as required (SMT, Board, etc.) for review by the Director, Financial Services and Controllershship.	
2. FINANCIAL PERFORMANCE AND RISK ANALYSIS AND REPORTING:	(30%)
<ul style="list-style-type: none">• Identify and recommend strategies to deal with anomalies and variances, monitor operating and capital expenditures and initiate correction of errors with the budget managers.• Research and recommend financial performance measurement processes and practices.• Coordinate and file reports in accordance with Ministry Binding Policy Directives: Enrolment, Student Assistance Set Aside, Tuition Fee attestations and others and act as the College contact for Ministry feedback and requests for further information.• Identify budget and forecast risks and opportunities and report to the Director of Financial Controllershship.• Coordinate and provide analysis of variances.• Calculate liabilities related to specific agreements and contracts as required.• Manage the process and completion of annual program costing.	

- Design customized reports for financial and statistical analysis.
- Proactively prepare sensitivity analysis on how actual results will impact funding.

3. FINANCIAL SYSTEMS

- Serve as the System Administrator and Subject Matter Expert for Budget Cognos budgeting tool.
- Development financial reports in Nvision, spreadsheets or other analysis tools as requested by Finance and College Departments.
- Responsible for the budget and forecast data uploaded from departmental input to Peoplesoft and to Cognos.
- Training and documenting defined business processes, and recommending improvements in processes and systems.
- Taking leadership role in system improvement, implementation and change management.
- Manage the creation and implementation of new accounts, program codes etc.
- Recommend system and process modifications to improve efficiencies and quality of information.

(15%)

4. ADMINISTRATION

- Provide leadership and supervision to staff by determining work priorities.
- Maintain a high level of performance through effective recruiting, selecting, developing, motivating, evaluating and training of staff.
- Liaise with other Colleges or external agencies to research data and best practices as required.
- Attend provincial committee meetings in place of the Director, Financial Services and Controllershship as required.

(10%)

TOTAL:

100%

1. COMPLEXITY - JUDGEMENT (DECISION MAKING)

Complexity refers to the **variety** and relative **difficulty** of **comprehending** and **critically analysing** the material, information, situations and/or processes upon which decisions are based.

Judgement refers to the **process** of identifying and reviewing the available options involved in decision making and then choosing the most appropriate option. Judgement involves the application of the knowledge and experience expected of an individual performing the position.

Provide up to three examples of the most important and difficult decisions that an incumbent is typically required to make.

- a) Systematic development of the budget and forecast processes and timelines that meet the users and college's needs, understanding the sequence of events required to ensure a logical and efficient process.
- b) Training the broader College community on best financial practices and processes related to budgeting and forecasting.

The incumbent will determine, through input from users and management, areas for training for financial users and develop a program, which will improve their understanding of the processes, their roles and skills set required to undertake the level of financial management expected in their roles.

- c) Identify anomalies/errors/inappropriate items/ amounts along with risks and opportunities in departments' budgets during development and provide Budget Managers with appropriate suggestions and advice.

2. EDUCATION (to be completed by the College)

Education refers to the **minimum level** of formal education and/or the type of training or its equivalent that is required of an incumbent at the **point of hire** for the position. This may or may not match an incumbent's actual education or training.

The College is to identify the minimum level of education and/or type of training or its equivalent that is required for the position based upon the College's recruitment standards.

Non-Post Secondary	
<input type="checkbox"/> Partial Secondary School	<input type="checkbox"/> Secondary School Completion
Post Secondary	
<input type="checkbox"/> 1-Year Certificate	<input checked="" type="checkbox"/> 4-Year Degree
<input type="checkbox"/> 2-Year Diploma	<input type="checkbox"/> Masters Degree
<input type="checkbox"/> 3-Year Diploma/Degree	<input type="checkbox"/> Post Graduate Degree
<input checked="" type="checkbox"/> Professional Designation	Specify: CPA or equivalent
<input type="checkbox"/> Other	Specify:

A) Specify and describe any program speciality, certification or professional designation necessary to fulfil the requirements of the position.

- Degree in Business/Commerce or another field relevant to the duties of the position.

B) Specify and describe any special skills or type of training necessary to fulfil the requirements of the position (e.g., computer software, client service skills, conflict resolution, operating equipment).

- Familiarity with Public Sector Accounting Standards
- Advanced working knowledge/competence in the use of integrated financial systems
- Exceptional analytical skills combined with intuition and creativity
- Ability to resolve issues independently, with limited supervision by senior management
- Demonstrated understanding of financial analytics, planning and forecasting techniques, as well as business processes
- Excellent interpersonal and communication skills. Ability to explain accounting procedures with non-financial personnel (Deans, Directors, Chairs) across the diverse College community. Ability to deal confidently with senior managers, staff members, Ministry representatives, etc.
- Expert with advanced functions in Excel
- Highly client service oriented

3. EXPERIENCE (to be completed by the College)

Experience refers to the amount of **related, progressive** work experience required to obtain the essential techniques, skills and abilities necessary to fulfil the requirements of the job at the **point of hire** into the position. This may or may not match the incumbent's actual amount of experience.

The College is to identify the minimum amount and type of experience appropriate for the position based upon the College's recruitment requirements.

Experience required at the point of hire. Up to and including:

- | | |
|--------------------------------------------|---------------------------------------------|
| <input type="checkbox"/> 0 - no experience | <input type="checkbox"/> 3 years |
| <input type="checkbox"/> 1 month | <input checked="" type="checkbox"/> 5 years |
| <input type="checkbox"/> 3 months | <input type="checkbox"/> 7 years |
| <input type="checkbox"/> 6 months | <input type="checkbox"/> 9 years |
| <input type="checkbox"/> 1 year | <input type="checkbox"/> 12 years |
| <input type="checkbox"/> 18 months | <input type="checkbox"/> 15 years |
| <input type="checkbox"/> 2 years | <input type="checkbox"/> 17 years |

Specify and describe any specialized type of work experience necessary to fulfil the requirements of the position.

- Proven experience developing, maintaining and controlling multi-divisional budget and financial systems
- Demonstrated ability to work successfully with people at all organizational levels, and with diverse and sometimes conflicting interests and philosophies
- Demonstrated ability to present complex financial, statistical and other information in a clear and understandable manner

4. INITIATIVE - INDEPENDENCE OF ACTION

Initiative - Independence of action refers to the **amount of responsibility** inherent in a position and the **degree of freedom** that an incumbent has to **initiate** or **take action** to complete the requirements of the position. An incumbent is required to foresee activities and decisions to be made, then take the appropriate action(s) to ensure successful outcomes. This factor recognizes the established levels of authority, which may restrict the incumbent's ability to initiate or take action, e.g., obtaining direction or approval from a supervisor, reliance on established procedures/methods of operation or professional practices/standards, and/or built-in-controls dictated by computer/management systems.

A) Briefly describe up to three typical job duties/types of decisions that the incumbent is required to perform using their initiative without first having to obtain direction or approval from a supervisor.

- a) Recommend business improvement opportunities for existing and planned financial/budgeting processes and related systems of internal control.
- b) Advise budget managers and College staff in the process of budget preparation, analysis and interpretation of financial results. Identify budget risk areas and discuss with budget managers.
- c) Prepare and submit, and liaise with Ministry with respect to required submissions – Enrolment; Tuition Fee Set Aside Report etc... Work with Ministry to clarify and supplement information, interpretation of Binding Policy Directives, Operating Procedures, College Funding Formula allocations and calculations.

B) Briefly describe up to three typical job duties/types of decisions that the incumbent is required to perform which required the direction or approval from a supervisor.

- a) Design and format of Budget and Forecast statements to be presented to the Board.
- b) Implementing budget and forecast processes and process improvements.
- c) Assumptions used in the development of salary and benefit budgets and forecasts.

5. POTENTIAL IMPACT OF DECISIONS

Potential Impact of Decisions recognizes the **potential consequences** that **errors in judgement** made by an incumbent, despite due care, could have on the College. Usually, the higher the level of accountability inherent in a position, the greater the potential consequences there are on the College from errors in judgement.

Give up to three examples of the typical types of errors in judgement that an incumbent could make in performing the requirements of the position. Do not describe errors, which could occur as a result of poor performance, or ones that are rare or extreme. Indicate the probable effects of those errors on the College, e.g., loss of reputation of program/College, waste of resources, financial losses, injury, property damage, effects on staff, students,

clients or public.

- a)** Misinterpretation of data, trends, etc. could lead to misrepresentation of metrics and measures, affecting quality of decisions made, of information presented to Senior Management and/or Board, and in the longer term financial or reputational peril.
- b)** Errors or omissions in forecasting or modelling could lead to inappropriate resource allocation or other key decisions, unfavourable financial variances, and/or misleading or incorrect/incomplete reports and presentations to Board, Ministry, etc. In the longer term severe impairment of the College's sustainability, reputation, and quality of programming could result.
- c)** Incorrect or erroneous interpretation or application of current Ministry calculation methodologies, policy and procedures (which are changed or updated on a regular basis) or Funding Formulas could result in grant penalties, eroded relationship with Ministry and with Board, damage to community and student trust and respect.

6. CONTACTS AND WORKING RELATIONSHIPS

Contacts and Working Relationships refers to the **types, importance** and **intended outcomes** of the contacts and working relationships required by an incumbent to perform the responsibilities of a position. It also measures the skill level required to be effective in dealing with contacts and being involved in working relationships. This factor does **not** focus on the level of the contact, but on the **nature** of the contact.

Indicate by job title, with whom an incumbent is required to interact to perform the duties and responsibilities of the positions. Describe the nature, purpose and frequency of the interaction, e.g., exchanging information, teaching, conflict resolution, team consultation, counselling.

Contacts	Contacts by Job Title	Nature and Purpose of Contact	Frequency of Contact	
			Occasional	Frequent
Internal to the College:			Occasional	Frequent
Internal to the College, e.g. students, staff, senior management, colleagues.	Financial Services	Advise on setup of new accounts, programs. Share budget info as required and assist with variance analysis.		X
	Academic Division	Provide program costing and analysis for new programs and annual performance of existing programs	X	
	College Budget Managers	Advice and support for budgeting; financial analysis, support and training on budgeting and reporting applications, liaison re: results, etc.		X
	Registrar/Student Services	Coordinate obtaining budget and forecast Enrolment data from Registrar and student fee information from Student Services	X	
External to the College:			Occasional	Frequent
External to the College, e.g. suppliers, advisory committees, staff at other colleges, government, public/private sector.	MCU	Submission of reports, interpretation of policy; response to queries and requests for information	X	
Occasional (O)	Contacts are made once in a while over a period of time.			
Frequent (F)	Contacts are made repeatedly and often over a period of time.			

7a. CHARACTER OF SUPERVISION/FUNCTIONAL GUIDANCE

Character of Supervision identifies the **degree and type** of supervisory responsibility in a position or the nature of functional/program supervision, technical direction or advice involved in staff relationships.

(√) Check the applicable box(es) to describe the type of supervisory responsibility required by an incumbent in the position:

- Not responsible for supervising or providing guidance to anyone.
- Provides technical and/or functional guidance to staff and/or students.
- Instructs students and supervises various learning environments.
- Assigns and checks work of others doing similar work.
- Supervises a work group. Assigns work to be done, methods to be used, and is responsible for the work performed by the group.
- Manages the staff and operations of a program area/department.*
- Manages the staff and operations of a division/major department.*
- Manages the staff and operations of several divisions/major departments.*
- Acts as a consultant to College management.
- Other e.g., counselling, coaching. Please specify:
 -

* Includes management responsibilities for hiring, assignment of duties and work to be performed, performance management, and recommending the termination of staff.

Specify staff (by title) or groups who are supervised/given functional guidance by an incumbent.

- Financial Officers
- Budget Managers
- College staff

7b. SPAN OF CONTROL

Span of Control is complementary to **Character of Supervision/Functional Guidance**. Span of Control refers to the **total number of staff** for which the position has supervisory responsibility, (i.e., subordinates, plus all staff reporting to these subordinates).

Enter the total number of full time and full time equivalent staff reporting through to the position. Also identify the number of staff for whom the position has indirect responsibility (contract for service), if applicable.

Type of Staff	Number of Staff
Full-Time Staff	4
Non Full Time Staff (FTE) *	0
Contract for Service **	0
Total:	4

*** Full Time Equivalency (FTE) conversions for non full time staff are as follows:**

Academic Staff

Identify the total average annual teaching hours taught by all non full time teachers (part-time, partial load and sessional) for which the position is accountable and divide by 648 hours for post-secondary teachers and 760 hours for non-post-secondary teachers.

Support Staff

Identify the total average annual hours worked by part-time support staff for which the position is accountable and divide by 1820 hours.

Administrative Staff

Identify the total average annual hours worked by non full time administrative staff for which the position is accountable and divide by 1820 hours.

**** Contract for Services**

When considering “contracts for services,” review the nature of the contractual arrangements to determine the degree of “supervisory” responsibility the position has for contract employees. This could range from “no credit for supervising staff” when the contracting company takes full responsibility for all staffing issues to “prorated credit for supervising staff” when the position is required to handle the initial step(s) when contract staffing issues arise.

8. PHYSICAL AND SENSORY DEMANDS

Physical/Sensory Demands considers the **degree** and **severity** of exertion associated with the position. The factor considers the intensity and severity of the physical effort rather than the strength or energy needed to perform the task. It also considers the sensory attention required by the job as well as the frequency of that effort and the length of time spent on tasks that cause sensory fatigue.

Identify the types of physical and/or sensory demands that are required by an incumbent. Indicate the frequency of the physical demands as well as the frequency and duration of the sensory demands. Use the frequency and duration definitions following the tables to assist with the descriptions.

PHYSICAL DEMANDS

Describe the types of activities and provide examples that demonstrate the physical effort that is required in the position on a regular basis, i.e., sitting, standing, walking, climbing, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period of time.

Types of Activities that Demonstrate Physical Effort Required	Frequency (note definitions below)				
	Occasional	Moderate	Considerable	Extended	Continuous
Sitting for extended periods				X	
Computer work station				X	

SENSORY DEMANDS

Describe the types of activities and provide examples that demonstrate the sensory effort that is required in the position on a concentrated basis, i.e., reading information/data without interruption, inputting data, report writing, operating a computer or calculator, fine electrical or mechanical work, taking minutes of meetings, counselling, tasting, smelling etc.

Types of Activities that Demonstrate Sensory Effort Required	Frequency (note definitions below)					Duration
	Occasional	Moderate	Considerable	Extended	Continuous	Short Intermediate or Long
Concentration / Attention to Detail				X		I
Preparing reports / analysis/ Complex spreadsheets			X			I
Frequent interruptions and changing priorities and demands			X			S

FREQUENCY:

Occasional:	Occurs once in a while, sporadically.
Moderate:	Occurs on a regular, ongoing basis for up to a quarter of the work period.
Considerable:	Occurs on a regular, ongoing basis for up to a half of the work period.
Extended:	Occurs on a regular, ongoing basis for up to three-quarters of the work period.
Continuous:	Occurs on a regular, ongoing basis throughout the entire work period except for regulated breaks.

DURATION:

Short:	Up to one hour at a time without the opportunity to change to another task or take a break.
Intermediate:	More than one hour and up to two hours at a time without the opportunity to change to another task or take a break.
Long:	More than two hours at a time without the opportunity to change to another task or take a break.

9. WORKING CONDITIONS

Working Conditions considers the frequency and type of exposure to undesirable, disagreeable environmental conditions or hazards, under which the work is performed.

Describe any unpleasant environmental conditions and work hazards that the incumbent is exposed to during the performance of the job.

Environment

Describe the types of activities and provide examples that demonstrate exposure to unpleasant environmental conditions in the day-to-day activities that are required in the job on a regular basis, e.g., exposure to dirt, chemical substances, grease, extreme temperatures, odours, noise, travel, verbal abuse, body fluid, etc. Indicate the activity as well as the frequency of exposure to undesirable working conditions.

Types of Activities That Involve Job Related Unpleasant Environmental Conditions	Frequency (note definitions below)		
	Occasional	Frequent	Continuous
Travel by car to other campuses	X		

Hazards

Describe the types of activities and provide examples that demonstrate the hazards in the day-to-day activities that are required in the job on a regular basis, e.g. chemical substance, electrical shocks, acids, noise, exposure to infectious disease, violence, body fluids, etc. Indicate the activity as well as the frequency of exposure to hazards.

Types of Activities That Involve Job Related Hazards	Frequency (note definitions below)		
	Occasional	Frequent	Continuous
Not applicable			

Frequency:

Occasional	Occurs once in a while, sporadically.
Frequent	Occurs regularly throughout the work period.
Continuous	Occurs regularly, on an ongoing basis, throughout most of the work period.

Additional Notes Pertaining to this Position: