Position Description Form (PDF)

College:	Fleming College		
Incumbent's Name:	Vacant		
Position Title:	Intake and Case Management Consultant	Payband:	G
Position Number:	S00277	Hours per Week:	35
Supervisor's Name and Title:	Elayne Furoy, Manager, Employment& Career	Services	
Completed by:	Debby Keating	PDF Date: May 5, 201	16
Signatures:			
Incumbent:(Indicates the incumbent has read and understo	pod 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 representative 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.

Provides intake assessment, case management and employment counselling to unemployed individuals and groups. Develops personalized job search and training action plans. Identifies and secures appropriate resources and funding to assist with education, training, job development and self-employment opportunities.

Promotes Employment Ontario programs and services, recruits job seekers and employers in the community. Maintains records, documentation and statistical information for funding, reporting and accountability purposes.

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 then detailed work routines.

	Approximate % of the Time Annually*
 Provides Effective Case Management Support to Clients: Conducts initial intake and case management assessments by gathering information from the applicants and referring partners related to the participants long and short term goals, skills, aptitudes, interests, education and work history. Assists in creating and updating participants Action Plans to include employment and training goals ensuring a personalized approach that meets each individual's learning style, abilities and interests. Assesses job readiness and motivation to determine realistic employment options. Discusses, analyses and provides advice on training and educational upgrading needs based on goals and their barriers to employment. Manages expectations of client. Provides employment consulting to multi-barriered and high-risk clients. Frequently required to negotiate behavioural changes with clients. Assists in development of job search tools – resumes, interviewing, self marketing skills. Develops and presents a variety of employment directed workshops for clients. Determine an appropriate level of support and referrals to outside services based on the various situations that arise which may include issues related to the law, addictions, family, housing, and other personal situations. 	45%
 Undertakes Job Development Initiatives: Reviews the local labour market to determine skill development needs and occupational training opportunities. Has a thorough understanding of emerging labour market trends. Identifies employment opportunities for clients, which include: cold calling to employers; researching jobs advertised on the internet and in print publications; participating in trade shows and job fairs; personal networking; and, responding to employer enquiries. Provides information about both internal and external programs and services for employers. Maintains familiarity with the Employment Standards Act, Health and Safety Act and other employment related legislation and government services. Provides support to clients after a placement, amending the resume to reflect experience and training achievements if another placement is required or strategizing next steps after placement if client is unemployed. 	30%
 File Documentation and Reports, other duties as assigned: Completes detailed file documentation on participants and employers and maintains up-to-date client files according to program guidelines and departmental procedures. Uses computerized case management and Ministry client tracking systems. Completes statistical narrative reports for the Manager as required. Tracks progress toward outcome targets using Ministry reporting tools. 	15 %
 4. Attend and participate in: Team staff meetings and departmental meetings Special events to promote programs and services Community agency events and activities 	5%

5.	Other related duties as assigned	5%

* To help you estimate approximate percentages:

1/2 hour a day is 7% 1/2 day a week is 10 1 week a year is 2% 1 hour a day is 14% ½ day a month is 2%

1 hour a week is 3% 1 day a month is 4%

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.

Up to High School or equivalent		1 year certificateor equivalent	2 year diploma or equivalent
Trade certification or equivalent		3 year diploma/degreeor equivalent	3 year diploma / degree plus professional certification or equivalent
4 year degree or equivalent		4 year degree plus professional certification or equivalent	Post graduate degree or (e.g. Masters) or equivalent
Doctoral degree or equivalent			
Field(s) of Study:			
Employment/Career Counselling, Social Work, Human Resources			

B. Check the box that best describes the requirement for the 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 requirements 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 requirement obtained by course(s) of a total between 101 and 520 hours	
Additional courses obtained by course(s) 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 years 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 the on-the-job training occurs after the conclusion of the educational course or program.

	Less than one(1) year	
	Minimum ofone (1) year	
	Minimum of two (2) years	
X	Minimum of three (3) years	Career Counselling /Consulting, Job Development, Relevant Marketing, Recruitment and Selection, relevant volunteer experience. Experience working independently in a front line customer service, team environment prioritizing, organizing and problem solving own work. Experience working with a variety of software packages i.e. word processing, email, internet. Experience working with a variety of clients with varied needs.
	Minimum of five (5) years	
	Minimum of eight (8) years	

3. Analysis and Problem Solving

This section relates to the application of analysis and judgment 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 judgment 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.	Client demonstrates repeatedly the inability to maintain a job
How is it identified?	Job is terminated by more than one employer
Is further investigation required to define the situation and/or problem? If so, describe.	Information is gathered in order to understand the nature of the problem and be in a position to assist the client in becoming more self-aware. May discover mental health issues, physical problems, social ineptness, behavioural disorders, learning disabilities, a severe lack of motivation, family disruptions, criminal history, lack of adequate resources such as housing, clothing, and transportation.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent has acquired knowledge, skills, awareness and experience which enable him or her to determine the appropriate solution. The incumbent will review all pertinent and applicable information with the client in an effort to identify potential training, educational and employment problems and in identifying and setting up the steps leading towards fulfillment of the client's career and employment plan.
What sources are available to assist the incumbent finding solution(s)? (eg. past practice, established standards or guidelines.)	Employment Ontario Guidelines and support documentation; college policies and procedures, past practices and experience in working with clients, Employment Ontario Resource Manual etc.) as well as human rights legislation.

3. Analysis and Problem Solving

	#2 regular & recurring
Key issue or problem encountered.	Each client presents with a unique set of strengths, challenges and barriers. Servicing this diverse section of clientele requires a personalized approach to determine which programs and services are required to best meet their needs. It is also important to demonstrate to the Ministry that appropriate interventions are being provided and that the most effective and efficient use of resources and supports is being made.
	The incumbent must be thorough and precise throughout the intake and assessment process to ensure that needs of clients are accurately identified in order facilitate the accurate development of their career action plan.
How is it identified?	A comprehensive intake and assessment process including questionnaires, application forms, reference checks and extensive questioning of the client assist the incumbent in identifying client needs.
Is further investigation required to define the situation and/or problem? If so, describe.	The incumbent, based on the analysis of the initial intake and assessment, may require additional information from the client in order to resolve concerns the incumbent may have. This may include requests for career vocational testing, medical information, school reports, probation officer reports, disability assessments, employer reference checks, discussion with Ontario Works case manager, El eligibility checks, etc.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent will review all pertinent and applicable information with the client in an effort to identify potential educational and employment problems and in identifying and setting up the first steps of the client's career and employment plan. He/she will also utilize knowledge of manager and senior consultants as part of the action planning process.
What sources are available to assist the incumbent finding solution(s)? (eg. past practice, established standards or guidelines.)	Direction from senior consultants/manager will guide the incumbent in the development of plans. MTCU guidelines and supporting documentation are available however these are broad and not client specific.

Key issue or problem encountered.

How is it identified?

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

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

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

3. Analysis and Problem Solving

Key issue or problem encountered.

How is it identified?

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

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

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

Key issue or problem encountered.

How is it identified?

May 5, 2016

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

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

#3 regular & recurring

....

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

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



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

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.

In the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring to the position, up to two (2) examples that occur occasionally.

	#1 regular and recurring
List the project and the role of the incumbent in this activity.	There is an employment action plan that is developed by the Intake and Case Management Consultant and client based on the client's needs identification and skill level. The Intake and Case Management Consultant then creates a specific employment search action plan in conjunction with the client.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Must be able to provide direction, guidance and yet not force client to so something he/she is not capable of or interested in doing. Communication and skills analysis are key.
List the types of resources required to complete this task, project or activity.	Clients resumes, labour market info, internet, action plan form, past relationship with employers.
How is/are deadline(s) determined?	There are fixed deadlines because client services are personalized; but an action plan should be at initiated during the first client visit and completed by the end of the second appointment.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	The Intake and Case Management Consultant and/or the client may initiate such changes. Changes to the plan would really only impact the client. For example if the client decided after researching a field that it was not what he/she wanted to do, they would advise the Intake and Case Management Consultant who would change focus on what he/she was looking for out in the community.

4. Planning/Coordinating

	#2 regular and recurring
List the project and the role of the incumbent in this activity.	The incumbent is provided with annual team targets. As a team, and under the supervision of the manager, individual targets are set. The incumbent must plan how he/she will achieve the targets and implement solutions/strategies when the targets appear to be slipping.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Must be able to create personal action plan with specific concrete activities to influence the targets. Must analyze all appropriate numbers, recognizing the connectivity of same and ensure action plans are in line. Must use a continuous quality improvement approach of plan, do, check, act at least monthly to ensure targets remain on track.
List the types of resources required to complete this task, project or activity.	One on one assistance from manager; weekly team meetings to share best practices, knowledge of the team plans; CATS (our data system) reports and data are available once initial targets are set;
How is/are deadline(s) determined?	Annual targets are set and then translated to individual targets. Incumbent would review monthly and implement plans as required.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	Manager
	#0
	#3 regular and recurring
List the project and the role of the incumbent in this activity.	Workshops and presentations to communitypartner agencies.

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

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

How is/are deadline(s) determined?

activities etc. to meet specific client needs Workshop materials exist in the shared directory. Resources are available on our website. Incumbent is expected to use in-house best practices shared at team meetings and use online resources to keep materials up to date and engaging.

Deadlines are determined on a monthly basis. Workshops are predetermined in response to 4.

Who determines if changes to the project or	demand.i.e. summer versus winter, client requests, ongoing training. Changes to the project or activity are determined by
activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	manager, team of Employment and Training and Intake and Case Management Consultants. At times, workshops are not required on an ongoing basis or there are no participants. Team would determine what
	recent changes have occurred for lower numbers or why some workshops are not as popular as others. The team would assess ways to increase awareness of workshops and perhaps create new ones to appeal
Planning/Coordinating	to our clients.
i lanning/ooolainaing	#1 occasional (ifnon, please strike out this sections)
List the project and the role of the incumbent in this activity.	Coordinate with Service Canada, Ministry of Community & Social Services, Ontario Works or other service agencies to design and deliver workshops & training sessions that meet the needs of a diverse client group.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Transferable skills such as counseling, job development and client advocacy may be applied to other projects within the employment umbrella
List the types of resources required to complete this task, project or activity.	Project guidelines
How is/are deadline(s) determined?	Will be dependent on the project
Who determines if changes to the project or activity are required? Who determines whether	Additional projects will be determined through discussion with the manager.
these changes have an impact on others? Please provide concrete examples.	
List the project and the role of the incumbent in this activity.	#2 occasional (if non, please strike out this sections) Collaborate with communityagencies to deliver employment related events
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Collaboration skills, political sensitivities and time management skills are necessary to deliver a joint event.
List the types of resources required to complete this task, project or activity.	Past practices, community knowledge, project guidelines and partner agency target focus.
	[]

How is/are deadline(s) determined?	Dependent on project and various partners goals.
Who determines if changes to the project or	Success of the project will be measured by the partner
activity are required? Who determines whether	agencies based on their goals, Continuation of the
these changes have an impact on others? Please	project will be determined through discussion with the
provide concrete examples.	manager.

5. Guiding/Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus the actions taken (rather than the communication skills) that directly assist others in the performance of their work 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
		Minimal requirement to guide/ advise other. The incumbent may be required to explain procedures to other employees or students	Intake and Case Management Consultants will welcome and assess clients who come to the resource room; explain computer applications, answer questions and help navigate within their job search.
		There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete certain tasks	. Uses expertise to advise and guide others. 'Intensive service' clients who require employment assistance and guidance. Provide encouragement, solutions, and ongoing customer care. Develop resumes, career actions plans, job search strategies, and provides on-going career directions to clients. Provides information to employers related to hiring practices Identifies client's barriers to employment and develops long and short-term steps for them to overcome barriers. Monitors the client's progress and adapts the steps to accommodate unexpected situation. Assigning tasks to clients

		i.e. job interviews, job search, attend workshops
	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	
	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 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 this 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	d or provided at the beginning of a work assignment?
Regular and Recurring	Occasional (If none, please strike out this section)
After initial training, incumbent generally plans and completes work on their own	When a problem occurs, manager or leader may provide specific direction. Team decision may provide
'	guidance and assistance as well.

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

Regular and Recurring Occasional (If none, please strike out this section)			
Employment Ontario guidelines, College policies. WSIB, Employment Standards Act, Health and Safety			
Employment Ontario Resource Manual, file	Act, Ontario Works, Federal agency programs,		
management, best practices within team	Ministry of Labour		

How is work reviewed or verified (e.g. Feedback fro	m others, work processes, supervisor)?
Regular and Recurring Manager conducts performance reviews of the Intake and Case Management Consultant; monthly reviews of statistical data as well as client and employer satisfaction surveys, performance reviews, Ministry reviews and status reports.	including individual client file audits as required. Annual conferences and outside partnership

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)
 Case Conferencing with other Consultants around coordination of all aspects of service to clients. Partner Agencies – presentations, discussing problem employers, clients High school teachers – class presentations 	 Probation Officers Ontario Works Caseworkers The above agencies or 'workers' may be consulted to develop an appropriate action plan for a client. Their expertise may be needed to fully address the issues or barriers of a client.

Describe the type of decisions that would be decide	d in consultation with the supervisor.
Regular and Recurring	Occasional (If none, please strike out this section)
Changes to processes, files, office changes, meeting target numbers, scheduling	Conflict with other agencies, case reviews, budgets, problem clients a/o employers

Regular and Recurring	Occasional (If none, please strike out this section)
 Determining if clients are eligible for intensive services Employer/Client conflicts Client intake – Assessment session Problems with regard to client progress Appropriate jobs for client Assessing repeat clients Resume suggestions/changes Closing client files 	Termination of placement or discontinue a client from the program. Makes decisions about whether or not to allow an employer to participate, or to continue a participant in the program. Employer/client conflicts

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 a 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 fulfill 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
How is it received?	How is it carried out?			(D,W,M,I)*
The incumbent receives requests for career and employment services from the public/potential clients.	Consultant explains how support is conducted and pro- ideas to ensure success. On customer care is maintaine ensure client contact is not Follow-up with client after exit 3 months to ensure success support. Individuals are assessed to so they match Employment O criteria. The incumbent assess the individual situation/qualifications determines appropriate action referral to outside service? Su job readily available? Suppor search?	vides going ed to lost. every s and see if ntario then duals' and on – itable	Clients	D
Employers contact the incumbent to discuss their hiring needs.	If they are new to the service consultant listens to their req and determines how we can h they are an ongoing custome designated E&T consultant assess their request.	uests elp. lf er the t will	Employer	D
MTCU requires follow up on clients.	MTCU Employment and Tra Consultant will request follow client to determine succes clients after placement and being closed.	upon sof	MTCU	М
Request for the delivery of Workshops	Customize workshop materia meet needs of a particular clie		Clients	М

* 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	Program overview with clients, employers, community partners	Employers, Consultants, clients, agencies	D
Explanation and interpretation of information or ideas.	Explanation of the Employment Ontario goals in relation to the Employer requests and outcomes	Employer	D
Imparting technical information and advice	Job Search information via internet. Explaining details and components of the apprenticeship training system, including access, eligibility requirements and challenge process.	Clients and the general public.	D
Instructing or training	Provides information on a variety of employment related topics such as resume writing, job search techniques, career clarification, apprenticeship, on- the-job training in a formal workshop setting.	Clients	М
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, and 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 at a computer	D		Х		Х		
Driving	М		Х		Х		
Lifting	М	Х					Х
Standing in front of a group when delivering workshops.	W		X		X		

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

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

⊠ Light (up to 5 kg or 11 lbs.)	Movement of boxes of materials, display units, promo items for workshops and trade fairs.
Medium (between 5 to 20 kg and 11 to 44 lbs.)	
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 the task and the duration of the task, including breaks (e.g. up to two hrs. at one time including scheduled breaks)
- impact on attention or focusdue to changes to deadlines or priorities
- the need for the incumbent to switch attention between tasks (e.g. 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	Average Duration		
	(D,W,M,I)*	Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Client intake session	D		Х	
Can concentration or focus be maintained throughout the duration of the activity? If not, why?				
Usually		-	-	
No No				

Activity #2	Frequency	Average Duration			
	(D,W,M,I)*		Long up to 2 hrs.		
Typing case management notes and data entry. Notes are important for compliance auditing and tracking client activity	D		x		
Can concentration or focus be maintained throughout the duration of the activity? If not, why? Usually No					
Client interruptions, phone, staff requiring information one else is in the office.	n. Must attend	to walk in clier	nts and phone o	alls when no	

Activity #3	Frequency Average Dura		M	
	(D,W,M,I)*	Short < 30 min	Long up to 2 nrs.	Extended > 2 hrs
Can concentration or focus be maintained throughout the duration of the activity? If not, why?				
No				

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

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)*
acceptable working conditions (minimal exposure to the conditions listed below)	Office environment for daily work	D
accessing crawl spaces/confined spaces		
dealing with abusive people	Clients with severe behavioural issues who become angry with program and rules or clients who are wanting an outcome that we cannot provide.	I
dealing with abusive people who pose a threat of physical harm		
difficult weather conditions		
exposure to very high or low temperatures (e.g. freezers)		
handling hazardous substances		
smelly, dirty or noisy environment		
⊠ travel	Travel to partner agencies and organizations in the community to participate in working groups, make presentations about services, promote CREW programs and services. Average 2-3 hours/month	М
working in isolated or crowded situations		
other (explain)		

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