Position Description Form (PDF)

College: Sir Sandford Fleming

Incumbent's Name: VACANT

Position Title: Academic Financial/Budget Officer   Payband: I

Position Code/Number (if applicable): S00400

Scheduled No. of Hours_____35/w_____

Appointment Type: ____X_____12 months _____less than 12 months

Supervisor's Name and Title: John Pacey, Manager, Financial Planning & Analysis

Completed by: Angie Sims, Director, Financial Services & Controllership

PDF Date: May 5, 2009
Last Revision: September 29, 2020

Signatures:

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

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 for 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 incumbent is responsible for the complex financial analysis related to Academic operating budgets. The incumbent is involved in all aspects of the budget cycle including reviewing, interpreting, costing, modeling and analyzing budget submissions. They compile statistics, processes financial documents, and interpret agreements, policies and accounting principles. This position develops annual program and course costing that is relied upon to guide decisions around program sustainability.

In addition, this position participates as a member of a dynamic academic administration planning team with responsibility for the implementation of key academic delivery processes and systems to ensure consistent college-wide processes, development of cross-functional, integrated timelines, and execution of all elements of the annual planning cycle including extensive reporting, tracking and analysis.

The incumbent is expected to work in a self-directed manner and display considerable initiative and independent judgment through interaction with budget managers and Deans. Through their duties, the incumbent is privy to highly confidential information.

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*
Budget & Financial Reporting & Analysis: Implements tracking, analysis, reporting and training of mechanisms for ongoing financial performance monitoring and budget development of all Academic Divisional Operating budgets. Identifies budget issues, researches, evaluates and provides alternative solutions on issues affecting academic financial management activities. Develops proposals for solutions of difficult financial management problems. Ensures the budgets are attainable and reasonable and assists Academic budget managers and Deans in establishing budgets. Gathers information and prepares financial reports for compliance with external funding agreements.	35%
Data Analysis & Compilation: Designs systems necessary to ensure that complex financial/budget data and statistics necessary to prepare budgets and ensure financial viability are available for analysis and review. This requires the development of tools and application of complex formulas and macros to extract and verify data from multiple, non-integrated systems and databases.	25%
Program/Course/Project Costing: As the key point of contact for the Academic division, the incumbent reviews proposals, interprets agreements and develops processes and systems for compiling, analyzing, and reporting program/course costing, as well as ad hoc project data from various sources, and manages the integration and verification of data for both existing and new programs. This involves the development of several models that are then used for final decision-making and direction. Redesigns systems and tools to ensure smooth flow of information to support this function.	25%
Budget Development, Coordination & Reporting: Develops the project plan for gathering academic budget data and timelines within the academic division ensuring alignment with corporate direction. Identifies the need for and recommends modifications, strategies and/or improvements to current budget data	10%
Other related duties as assigned	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.

☐ Up to High School ☐ 1 year certificate ☐ 2 year diploma

☐ Trade certification ☐ 3 year diploma / degree ☐ 4 year degree or 3 year diploma / degree plus professional certification

X Post graduate degree (e.g. Masters) or 4 years degree plus professional certification

☐ Doctoral degree

Field(s) of Study:

Accounting designation (CPA) required

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.

X 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	Progressive financial experience in a computerized accounting environment including budget preparation, financial analysis, project planning, process design/enhancement, and financial management. Experience using advanced skills in spreadsheet, database and report development, with the ability to extract and manipulate data from a number of sources. Experience using word processing and standard desktop applications. Experience working independently, prioritizing, organizing and problem-solving own work in a team-based customer service environment, providing service to a variety of clients.
□ 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.	In analyzing a School budget, the incumbent identifies that contract salaries appear to be high as compared to budget.
How is it identified?	Through analysis of budget and year-to-date expenditures by incumbent.
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent flags problem with Dean and then accesses source data such as contracts, payroll, enrolment #s, entire school curriculum and teaching hours required, Standard Workload Forms (SWF) to determine why the amount is out of line.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Incumbent retrieves data and then compares in detail the actual transactions (teaching contact hours) to the Budget forecast to identify discrepancies.
What sources are available to assist the incumbent finding solution(s)? (e.g. past practices, established standards or guidelines).	Evolve data/reports employee contracts, workloading reports. Requires a case-by-case analysis.

3.   Analysis and Problem Solving

#2 regular & recurring

Key issue or problem encountered	The Vice President, Academic Experience is considering suspension of a program and the incumbent is requested to provide program financial data.
How is it identified?	Program health is identified through a variety of indicators including program costing, Key Performance Indicators (KPI), satisfaction surveys, graduate placement reports, etc.
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent is required to provide an historical and detailed analysis of program data including enrolment, changes to curriculum, non-salaried expenses, delivery costs, etc.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Incumbent will produce actual data on identified program and will also provide models for potential changes to increase net contribution, etc.
What sources are available to assist the incumbent finding solution(s)? (e.g. past practices, established standards or guidelines).	KPIs, student satisfaction surveys, Memorandums of Understanding, My Academic Planning System (MAPS), Evolve data/reports, Annual program costing reports.

#3 regular & recurring

Key issue or problem encountered	The incumbent becomes aware that expenses within the Literacy and Basic Skills (LBS) program are going to exceed annual funding.
How is it identified?	The incumbent identifies the problem through ongoing analysis and review of budget and workload data.
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent must identify staffing arrangements and commitments and then compare what has been committed to the budgeted forecast to evaluate budget impacts.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent must identify the problem as outlined above and work with LBS managers and coordinators to develop a solution, or quantify the amount as a budget sore-thumb.
What sources are available to assist the incumbent finding solution(s)? (e.g. past practices, established standards or guidelines).	Funding agreements, LBS managers and coordinators, MAPS, Human Resources data, Evolve systems.

3.   Analysis and Problem Solving

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

Key issue or problem encountered	MAPS data cannot be reconciled to a general ledger account.
How is it identified?	Through ongoing analysis and reconciliation processes performed by the incumbent.
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent must perform a detailed review of data captured and General Ledger (G/L) details to identify discrepancies.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Identify error (process, data, keying) and originate an appropriate solution (journal entry, historical file correction, business process change).
What sources are available to assist the incumbent finding solution(s)? (e.g. past practices, established standards or guidelines).	MAPS, Evolve financials

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

Key issue or problem encountered	A request for data is received through from an external body regarding academic delivery/costs (e.g. Clinical Education Survey).
How is it identified?	The request originates with external bodies and participation is endorsed by the Vice President, Academic Experience.
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent must determine scope, what data is required, what data is available, where data resides, how to extract/gather, consolidate, etc.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Incumbent establishes timelines, communication strategy to gather information, conducts verification/reasonableness tests, reconfirms assumptions (i.e. Full Time Equivalent (FTE) calculation).
What sources are available to assist the incumbent finding solution(s)? (e.g. past practices, established standards or guidelines).	MAPS, Evolve financials, paper-based documents for non-standard data, external body reporting guidelines (vary from one project to another).

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.	Together with the Manager, Financial Planning & Analysis, the incumbent plans, organizes and leads preparation of academic division's budgets by developing the draft process, communication strategies and key messaging, and supporting reports and resources required for end users.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Incumbent must establish timelines to include preparation, budget development, consultation, consolidation, analysis, and formal reporting. Communicates with budget managers and Academic Planning and Operations (APO) to ensure timelines and expectations are mutually agreeable. Monitors progress of Deans and other key stakeholders, liaising with APO regularly to ensure Academic division is in sync with organizational processes. Works with APO to ensure information is available (queries, reports) to establish workload information in Total Contact Hours (TCH) format.
List the types of resources required to complete this task, project or activity.	Budget critical path, guidelines, broad strategies as approved by Senior Management Team (SMT). Access to budget reports, raw data (workloads, curriculum), year-to-date expenditures, capital costs.
How is/are deadline(s) determined?	Collaborates with Manager, Financial Planning & Analysis; aligns with Academic annual planning cycle.
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.	This varies with input from the incumbent, supervisor, Budget Services, SMT and the Board. Example: A plan has been developed for budget development and it is near completion when the provincial government announces a new Apprenticeship fund. Enrolment and revenues cannot be finalized. This impacts dates/timelines beyond that point.

4. Planning/Coordinating

#2 regular & recurring

List the project and the role of the incumbent in this activity.	Program/Course Costing – this requires the incumbent to source, gather, consolidate and manipulate data from multiple sources for each course delivered, and then combined for each program. This includes salaried and non-salaried costs, direct and indirect.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Scoping the entire project, identifying key stakeholders, identifying timelines, resources required and by when, cross-functional data required and contacts, priority setting and follow-up.
List the types of resources required to complete this task, project or activity.	Resources required to complete this task include access to data, tools for extraction, software for manipulation of data, verification processes, and independent peer for audit.
How is/are deadline(s) determined?	Working with Annual Planning Cycle, Academic Leaders Team and program decision-making cycle.
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 self-identifies continuous process improvements for reports and how data is recorded through out the year. Changes also originate at the Academic Leaders Team meetings such as additional reports to highlight significant year-to-year shifts, historical release patterns.

#3 regular & recurring

List the project and the role of the incumbent in this activity.	BScN financial planning and execution to ensure the joint partnership needs are met.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Gathering needs from separate institutions, communicating, identifying key stakeholders, timelines, deliverables, feedback processes.
List the types of resources required to complete this task, project or activity.	Access to data, tools for extraction, software for manipulation of data, verification processes, committee feedback.
How is/are deadline(s) determined?	Jointly between Trent and Fleming with incumbent making suggestions.

| 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. | Trent and Fleming staff make on-going recommendations regarding changes to timelines to better suit different organizations, to the tools to enhance reporting, and whether new information is required. Decisions are made jointly through BScN Finance Committee where incumbent serves as primary resource. |

4. Planning/Coordinating

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

List the project and the role of the incumbent in this activity.	Systems design – incumbent plays a key role in identifying systems requirements, enhancements and fixes as related to academic budget preparation.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Incumbent will scope out problem, possible solutions, impacts on data, conversion of data required, dependencies, timelines to accommodate system change, communication to those impacted. Incumbent must be mindful of end user skill sets to ensure development of appropriate solutions.
List the types of resources required to complete this task, project or activity.	Knowledge of system and data within, knowledge of system tables and data structures, data extraction tools.
How is/are deadline(s) determined?	In conjunction with other functional areas and Information Technology staff.
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.	Jointly depending on the situation. Example: a new field must be added to track technician hours at the program level. Timelines will be determined in conjunction with Human Resources, Information Technology (IT), Finance and APO.

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
☐	☐	Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	
☐	X	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	The incumbent will need to meet with new Deans, Chairs or operations managers to review budget documents and provide guidance in filling out the documents.
X	☐	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	During budget development and in the monitoring phases that follow, the incumbent provides counsel, advice and guidance to Deans, Chairs, Operations Managers and coordinators, including use of systems, interpretation of complex reports, recording options, modelling budgets/project costs, etc. Joint BScN requires that the incumbent designs models and reports for use by internal coordinators/faculty/Dean and external Trent University Academic and Financial personnel regarding handling of financial/budget items, costing and problem resolution

☐   ☐   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 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)
Typical work assignments are carried out independently with broad objectives and outcomes previously agreed to in consultation with the Manager, Financial Planning & Analysis.	

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (if none, please strike out this section)
College Policies & Procedures Budget Principles and Accounting Procedures Academic Schedule Annual Planning Cycle College Calendar Faculty Collective and Local agreements	

How is work reviewed or verified (e.g. feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional (if none, please strike out this section)
Progress and project plans are reviewed periodically as required depending on the project and cycle timing. Budget and financial work is reviewed by report and/or discussion as required; by detailed review at key periods (e.g. Budget development and budget update). Process redesign work is reviewed at critical decision points through update reports and discussion.	Incumbent will occasionally need to proceed without approval.

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)

	Complex financial and accounting reports that requires advice from an Accounting professional (i.e. CPA).

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)
Major budget variances with issues identified. Major deadline/workload conflicts that will require significant time commitment & be assessed against other priorities. Major systems issues that will require major procedural changes..	

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (if none, please strike out this section)
Development of data analysis and reporting mechanisms . Pro-actively identifying and following up on unusual situation and/or budget deviations. Providing resolution or recommendations on a continuous basis. Identification of process design issues; mapping and making recommendations for process improvement System design for budget and program costing Investigation and design of processes and methods, including control checks and creativity to meet the needs of multiple users Determining data integrity and reasonableness checks and levels of acceptable variance. Design of reports. When problems/issues need to escalate from Chairs/Operations Managers to Deans.	

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?		
Inquiries about budget, expenditures or financial models are typically received verbally, via email, or in person.	The incumbent clarifies the request through questioning and then works independently to conduct necessary data extraction, analysis and response.	Deans Chairs Operations Managers APO Leaders	D
BScN is a partnership with Trent and requests for service typically come via e-mail or telephone.	The incumbent provides proactive financial management and planning services in accordance with Finance Committee expectations; also responds to ad hoc request for information by sourcing, extracting and compiling data as required.	Trent academic/finance personnel Fleming academic/finance personnel	M
Inquiries about internal academic budget and expenditures are received in person, via e-mail or by telephone from Budget Services.	The incumbent clarifies the request through questioning and then works independently to conduct necessary data extraction, analysis and response.	Finance/Planning and Analysis	W

Requests for data and reports are received via e-mail, in person or via telephone from Supervisor	Incumbent clarifies expectations of ad hoc reports/data, timelines and then develops a plan for completion ensuring timelines are met and accuracy is assured.	Supervisor	W
Requests for reports originate via e-mail, in person, at committee tables or through official request.	Incumbent scopes out request by clarifying current data required, historical data, calculations, intent of report and its eventual use, timelines, audience, etc. They then develop the necessary report to meet end user needs.	Deans Chairs VP Academic Experience Operations Managers External customers Other functional areas	W

*   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	Solicit/provide information, seek clarification, problem-solving, coordination	External partners Deans/Chairs, Operations Managers, faculty, staff, students	M D
Explanation and interpretation of information or ideas	Information sharing with School/Program contacts and for data gathering and interpretation, particularly related to budget and program costing, ad hoc reporting & budget analysis Confirms curriculum delivery and financial modeling, development of budgets Troubleshooting, guidance re financial systems and processes	Deans/Chairs, Managers Trent school of Nursing Faculty and Staff	D M D

Imparting technical information and advice	Educates new Deans, Chairs and Operations Managers regarding budget information and systems as new staff move into these positions	Deans/Chairs/Operations Managers	I
	Provide complex explanation of highly detailed information but also understand the strategic focus of the task at hand.	Deans/Chairs/Operations Managers	W
	Collaborative planning and reduction of bottlenecks.	APO, Finance, Human Resources	M
	Provide information, clarification, guidance and advice re problems/processes	Finance Team members, Human Resources, Deans	
	Provide complex detailed information on academic budgets	Academic Division Leaders, APO	W
	Systems/desktop functionality, financial interpretation of reports; accounting practises and resourcing	Deans, coordinators, AS&T and academic division staff	M
	As part of corporate data management/information systems reporting, negotiates with other functional areas on required reporting approach, design, priority	Finance, Planning and Analysis, IT, Student Services	M
	Highly detailed and complex explanation of financial, budget, program costing and ad hoc reporting. Secure understanding at every level of the discussion/documentation in order to come to agreement and obtain co operation for changes and impacts	Deans/Chairs, Finance, APO, Academic Division Leaders	M
	Secure understanding regarding alignment of strategies when working through, inconsistency/problems with budgets, financial reporting and program costing results		M
Instructing or training			

Obtaining cooperation or consent	.		
Negotiating			

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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		
Intermittent standing walking	D	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)

□ Medium (between 5 to 20 kg or 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 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
Academic costing (program, course, modelling)	W		X	

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
X   Usually
       No –

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Budget analysis (mass data, analysis, balancing)	D		X	

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
X   Usually
       No –.

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Designing/developing new reports.	M		X	

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
X   Usually
       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)*
X acceptable working conditions (minimal exposure to the conditions listed below)	Office environment	D
□ accessing crawl spaces/confined spaces		
□ dealing with abusive people		
□ dealing with abusive people who pose a threat of physical harm		
□ difficult weather conditions		
□ exposure to extreme weather conditions		
□ exposure to very high or low temperatures (e.g. freezers)		
□ handling hazardous substances		
□ smelly, dirty or noisy environment		
X travel	To other campuses/external locations re. training, budget planning, meeting attendance.	I
□ working in isolated or crowded situations		
□ other (explain)		

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