Position Description Form (PDF)

College: Sir Sandford Fleming

Incumbent's Name: VACANT

Position Title: Financial Officer, School of Business & IT and Continuing Education   Payband: H

Position Code/Number (if applicable):

Scheduled No. of Hours_____35_____

Appointment Type: Full time Support

Supervisor's Name and Title: Musabbir Chowdhury, Dean, School of Business & IT

Completed by: Musabbir Chowdhury   PDF Date: March 29, 2021

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 of the position and not on exceptional or rare requirements.

3. If you have any questions, refer to the document entitled "A Guide on How to Write Support Staff Position Description Forms" or contact your Human Resources representation for clarification.

4. Ensure the PDF is legible.

5. Responses should be **straightforward and concise using simple factual statements.**

Position Summary

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

The incumbent is involved in all aspects of the budget cycle (development, analysis, monitoring and reporting) for preliminary budget development, quarterly review and semiannual update. The incumbent is also the primary point of contact for School purchasing, academic fees, capital and inventory provides oversight and guidance to program purchasing and day to day monitoring of the application of policies and procedures to ensure College-wide processes and timelines are being followed.

The incumbent also supports financial decision making by providing complex financial analysis and modelling related to curriculum delivery and redesign, operating and capital budgets, including Continuing Education and Contract Training.

The incumbent proactively monitors financial data and enrolment reports, providing updates and recommendation to School Academic Leaders.

The incumbent interacts with all School program departments and many services College-wide as the primary point of contact in all financial processes for School including accounting payroll processes, visa reporting, financial and operational analysis.

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*
1. **Budget Development, Monitoring and Reporting** • Responsible for all aspects of the School operating and capital budget cycle including preliminary budget development, quarterly review, and semiannual update. Duties include researching new information; budget development, compilation, and interpretation; costing analysis; and analyzing requests/submissions from Faculty, Technologist(s) and Managers. • Ensures the budgets are reasonable and attainable and provides advice to the Academic leaders in establishing attainable budgets. • Works with Academic Chair, Project Managers and Academic Operations to confirm and monitor faculty and technician complement costing including TCH reports, PT/PL mix, sessional and PT Tech contracts. • Provides guidance to technologist(s) and coordinators in the development of academic program course and supply fees in consultation with the Finance Dept. Prepares fee summaries for approval and monitors expenses against fees collected. • Provides guidance to program technologist(s) and coordinators on the capital submission process. Responsible for compiling and analyzing the data and supports School Academic Leaders in prioritizing capital selection. • Provides proactive administrative and financial support and communication mechanisms to ensure the effective management of the School's departmental and project budgets. • Develops and maintains robust tracking documents to assist Project Managers, coordinators/technologist(s) in understanding and monitoring their program costing. Provides advice to highlight and address program spending variances and yearly trends. • Throughout the budget year, ensures variances are identified at an early stage by ongoing financial analysis and tracking (monitoring/reviewing and interpreting) of the School's operating and capital budgets, including Academic programs and Continuing Education and Contract Training. Works closely with Academic Leaders, Project Managers, Coordinators, Technologist(s) and Budget Services to provide timely resolution to identified issues. • Recommends new processes and budget tools that assist with the budget cycle and which ultimately contribute to increased accuracy, efficiency, and ease of analysis.	30%

2. Financial Analysis and Modeling	20%

- Responds to financial enquiries and operational matters on a day-to-day basis, through analysis of issues, consultation with other staff and proactive problem solving and ongoing follow up.
- Responsible for on-going analysis of transactions for the School's cost centers by utilizing a variety of reports and report-writing tools to extract and manipulate data, including budget account data, using the "Bars" report-writer, ledger and other financial software.
- Compiles information from a variety of sources (i.e., curriculum grids, HR data) and prepares financial analyses and modeling for the School's Academic Leaders regarding program redesign to support decision making, financial efficiency finding and proactive issue identification and resolution.
- Conducts analysis of revenue generated from other sources both internal and external and works closely with Administrative Leaders on investigation of new revenue sources and development of proposals.
- Interprets and monitors agreements relating to external revenue generating sources including: Contract Training, external partnerships, lease agreements associated with equipment and leasing of space for programs. Tracks deliverables ensuring that reporting requirements and timelines are met.
- Performs quarterly analysis of projected and actual enrolment data for financial modeling purposes and budget monitoring. Flags discrepancies and identifies potential solutions for the attention of Academic Leaders.
- Provides data and analytical support to School's Academic Leaders for program costing and Integrated Program Planning. Supports program teams with data as required for development of remediation plans.
- Conducts analysis to provide proactive identification of opportunities for other efficiencies and savings for the School's cost centers (e.g., non-faculty staffing, bussing, equipment).

3. Purchasing, Capital and Inventory Oversight	

- As the primary point of contact for School's purchasing, provides oversight and guidance to program purchasing and day-to-day monitoring of the application of purchasing policies and procedures at School to ensure College-wide processes and timelines are being followed. Serves as the key front-line contact between operations at School and the Purchasing departments at the Sutherland Campus.

20%

- As the primary point of contact for School program VISA cards, including policies on using visa cards for purchases, (i.e.: splitting transactions) and ensures visa card holders submit their visa summaries on time to ensure accurate and timely financial reporting.
- Works directly with College service areas (Budget services, advancement, purchasing) to obtain capital needs for School program departments both proactively and in case of urgent need.
- Provides guidance to technologist(s), Project Managers, Program Officers, and faculty relating to adherence of College policies relating to asset/inventory acquisition and disposal.

• Makes payment for school activities, faculty and professional development using corporate/purchasing card.	
4. Financial Process Compliance • Primary point of contact in all financial processes for School including accounting payroll processes, financial analysis and operational analysis. Interacts with all School program departments and is the key front-line contact between operations at School and the Finance department at Brealey. • Processes financial documents and interprets policies and accounting principles. • Assists the Academic Chair, Continuing Education in the review of training related costing. • Drafts new procedures to support consistency and efficiency in financial operations where required (e.g., international travel, VISA holders) • Provides training and support to School faculty and staff to ensure College-wide financial processes and timelines are being followed. • Identifies and organizes file systems and performs record keeping to ensure compliance with records retention, audit and accounting requirements.	15%
5. Special Project Coordination • Participates and coordinates cross- CollegeCollege and external projects. (Inventory management tool, capital database tool) • Provides financial coordination for School's external partnerships and organizations.	10%
6. Other Duties: • Performs other 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	**X** 3-year diploma / degree	□ 4-year degree or 3-year diploma / degree plus professional certification

□ Post graduate degree (e.g., Masters) or 4 years degree plus professional certification
□ Doctoral degree

Field(s) of Study:

> 3-year diploma - Business Administration, Business & Commerce, or similar business-related, with a specialization in finance and/or accounting.

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 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 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

    □   Minimum of three (3) years

X Minimum of five (5) years	Progressive financial experience including budget preparation/ management, financial/variance analysis, exposure to project-based work assignments.
	Experience and demonstrated ability to work with complex excel spreadsheets. E.g., for budget preparation, to reconcile and analyze actual expenditures and revenues as compared to budget, to reconcile actual results to expected, analyze variances and follow up accordingly.
	Experience and demonstrated ability to problem solve and model alternate solutions to complex problems.
	Experience using word processing and standard desktop applications. (i.e., Oracle/Peoplesoft information systems).
	Experience working independently with significant autonomy and within a team environment.
	Experience organizing and prioritizing own work, designing and implementing action plans in a deadline-oriented customer service environment. Proactively plan annually and several months in advance, analyze and anticipate issues, effectively solve problems in a timely manner and exercise sound judgment.
	Experience co-coordinating several project components and using oral and written communication skills and interpersonal skills to liaise tactfully and diplomatically with multiple stakeholders both within the dept. and with other College depts. Experience building and maintaining relationships is essential.
☐ 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.	The incumbent is responsible for identifying and analyzing variance between projected budget and actual results and identifying options. Often during the year as actual activities differ from the original projections, a variance from the

	original budget results.
How is it identified?	The incumbent is responsible for reviewing monthly financial statements to identify discrepancies, recalculating the revised budget and the resulting variance. Through consultation with the Academic Leaders and/or Program Coordinators and Technologist(s), the incumbent will become aware of changes to planned budget, including enrolment fluctuations, staffing changes, and course delivery changes. Further, during periodic updates the incumbent should identify the variance when reconciling actual and projected expenditures as compared to budget as in some cases the Project Lead/budget manager does not realize there is a problem or significant change to the costs.
Is further investigation required to define the situation and/or problem? If so, describe.	Further investigation would be required. In the case where plans have changed, the incumbent will have to ask probing questions of appropriate faculty, staff and leaders, including outside of School (e.g., AO, HR, GAS) to gather information required to identify the changed components, their magnitude, and the reasons for deviation from planned amounts. If the incumbent identifies the variance from their reconciliations, again, they would have to ask questions to determine how the variance arose and determine what changes can be made to minimize the impact.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The analysis to determine the impact of the problem and/or a solution would be to take the information gathered and with the updated costing components, project the revised costs to the end of the budget. This would quantify the issue to be resolved. The incumbent would identify the increased individual components from original, identify the costs not yet committed to and provide some possible solutions to enable the Academic Leaders to make an informed decision as to how to modify the remaining budget. In cases of significant gaps with no opportunity to pull savings from other areas incumbent determines areas to defer spending or escalate the identified issue.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practices, established standards or guidelines).	Historical data, trend analysis, Sore thumb and opportunity tracking performed by incumbent to identify areas currently underspent or where opportunities may exist to offset problems.

#2 regular & recurring

Key issue or problem encountered	During preliminary Budget Development & Budget Update data is not complete or verified when dealing with program

	hours, course offerings and TCH's (teaching contact hours) which determines the budget for full time, part time and partial load academic delivery costs. Unanticipated faculty leaves also occur, with impacts on planned teaching assignments.
How is it identified?	The incumbent checks the information based on knowledge of the current curriculum, enrolment forecast/ program changes (new & suspended) for upcoming year, staffing plans and identifies discrepancies.
Is further investigation required to define the situation and/or problem? If so, describe.	Consultation occurs with academic operations, budget services and academic leaders to determine expectations for upcoming academic year. Investigation of current year pressure points, unplanned changes and opportunities must be identified for determining expectations for budget. Further investigation with AO or HR reports may also be required.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent researches historical data and identifies trends with information from system reports (MAPS, BARS reports, HR data suite, ledger). Information is not easily obtainable; oftentimes pieces of information are extracted and used in conjunction with other reports for analysis. Predictions are made based on known and unknown variables i.e. Are there known upcoming retirements or leaves, is there redesign upcoming, are there new programs slated to start and what are the staffing implications? The incumbent must rely heavily on financial expertise and knowledge of the different curriculum variables that apply to a wide variety of programs within School to determine which pieces of information are relevant for forecasting.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practices, established standards or guidelines).	AO, budget services, budget history, Academic Leaders

#3 regular & recurring

Key issue or problem encountered	Budget constraints and competing demands for resources among various programs require incumbent to monitor and analyze operations to find opportunities for, efficiency and cost savings. The incumbent analyzes data and makes suggestions to reduce costs i.e., purchasing power opportunities). Proactive issue identification and resolution is key to School operations.

How is it identified?	Faculty/Academic Leaders forward proposal for program redesign. Proactive opportunities created by incumbent through analysis and discussion with others of TCH/ program hours of current programs and program budgets. Other potential savings opportunities may be brought forward by faculty, technologist(s), or by the financial officer directly. Incumbent conducts year over year analysis and reviews current budget management strategies to determine historical trends.
Is further investigation required to define the situation and/or problem? If so, describe.	For opportunities related to course delivery, incumbent must access and analyze several MAPS reports to identify number of TCH's per course, number of TCH's per faculty (SWF reports), identify the FT faculty vs contract faculty (sessional/PT/PL). For opportunities related to program/project supplies, incumbent must gather data from ledger, invoices, faculty/technologist(s) and purchasing which are compiled and reviewed for detailed analysis. The incumbent recommends course of action for final approval by the Academic Leaders.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent determines what information sources are required for the project (I.e., what documents are required? Who is the source?); coordinates with "owners" of the source documents to obtain information; sets up meetings with stakeholders; conducts analysis through use of financial expertise, existing practices and performs data manipulation using various processing tools (Evolve, Excel). Throughout process tracks progress against established deadlines and monitors outcome through implementation.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practices, established standards or guidelines).	Academic Leaders, faculty and technologist(s) can assist with identifying program delivery efficiencies

#1 Occasional

Key issue or problem encountered	Ancillary, Course and Academic fees are reviewed, tracked and monitored by incumbent. The incumbent works to compile data from various sources, analyzes for compliance with MCU and purchasing guidelines, accuracy, completeness and reasonableness.

How is it identified?	The annual budget process requires submission of academic and ancillary fees to the Board of Governors for approval for the upcoming academic year. Course fees such as international trips can occur at any time throughout the year with the request done by faculty.
Is further investigation required to define the situation and/or problem? If so, describe.	The incumbent must develop an understanding of each program to determine which trips occur and the details surrounding them (i.e., Optional or compulsory, faculty or staff accompanying trip, cost structure). This usually happens in the form of a meeting with each department coordinator/technologist. For repeat activities, previous years' fees and results must be reviewed to identify areas of over or under-spending. The incumbent must liaise with budget services to determine if there are process/eligibility changes from prior year.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Using financial expertise and understanding of program operations the incumbent analyzes quotes, enrolment projections in conjunction with historical trends, contract pricing, and past ledger information to determine if templates provided from technologist(s) are compliant, complete and accurate. The incumbent undertakes the analysis with an understanding that errors or omissions can have a significant impact on the future of financial health for a program as the fees cannot be revised after submitted for approval and they are completed 8-12 months prior to semester start. The incumbent must proactively determine if a new program is to occur in the upcoming fiscal and conduct analysis to create a fee structure.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practices, established standards or guidelines).	Historical data, Budget Services, purchasing policies and Academic Leaders can assist with providing information on new programs and applicable policies.

#2 Occasional

Key issue or problem encountered	The capital request process occurs annually as part of budget development; however, School often encounters requirements for additional equipment due to breakdowns, failures or new technology implementation. With a large variety of applied learning programs, programs require significant pieces of equipment that are crucial in successfully delivering student outcomes. Incumbent must identify resources available to solve problem and monitor through to ensure problem resolution. The incumbent is also

	responsible for monitoring the asset recording process to ensure records are accurate, complete and up to date.
How is it identified?	Program technologist(s), Project Managers, Program Officers or faculty members identify issue or request for asset. Requests can also be forwarded from Academic Leaders.
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent will meet with tech/faculty, Project Managers, Program Officers to get a fulsome understanding of the equipment need, use and effect on curriculum deliverables and the cost implications for program/school budget.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Incumbent must analyze current resources (i.e., is there budget constraint, opportunity to work with Advancement/industry, an existing asset that can get us through semester, rental possibilities) to creatively program solve. Liaising with various stakeholders and communicating back with tech/faculty to ensure problem is resolved. Makes recommendation for next step to Academic Leaders.
What sources are available to assist the incumbent finding solution(s)? (e.g., past practices, established standards or guidelines).	Knowledge of College standards and past practices. Ongoing communication with staff members in other areas of the College (i.e., Advancement, purchasing, budget services, AO)

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.	Annual budget development and budget update activities are prescribed institutionally with accompanying policy and procedural details. The planning and coordination of departmental processes to meet these institutional requirements will fall to the incumbent with guidance from the Academic Leaders. The actual results need to be compared to the budget over the fiscal year and any differences identified and accounted for.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	The incumbent is required to understand and be skilled at standard budget planning processes including a detailed understanding of College budget systems and accounting

	processes in combination with a detailed understanding of the academic curriculum costing process, program operational budgets and project budgets. Above average proficiency in the use of complex Finance System reporting tools, and spreadsheet software to complete the budget and ongoing financial monitoring process.
	The School budget development process involves meeting with representatives from multiple academic programs to review and discuss their previous year's financial results, and their expected program needs for the coming year. In addition to the program expense budgets, ancillary fees and capital requests are all being developed concurrently. This requires strong time management and organizational skills to schedule and hold all of the required meetings, establish deadlines for others, monitor adherence to deadlines, coordinate activities and people, develop and refine submissions, follow up on progress, and determine any adjustments needed to ensure deadlines are met. Advance planning and coordination are particularly critical to plan for meetings with the Academic Leaders during the budget development process because their schedules are typically full and inflexible.
List the types of resources required to complete this task, project or activity.	College financial system, departmental budget records, enrolment reports, departmental personnel, College financial personnel. It is critical that the incumbent build and maintain relationships with employees across School and in other departments, particularly at the Sutherland Campus.
How is/are deadline(s) determined?	Institutional timelines and deadlines are prescribed. The incumbent establishes school specific timelines and deadlines sufficient to comply with the institutional requirements.
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	The incumbent will identify whether any changes to the school budget planning and development processes are required and recommend how they will be implemented for Academic Leader approval. The incumbent would be required to update budget information as required or do further analysis on the data.

#2 regular & recurring

List the project and the role of the incumbent in this activity.	The incumbent provides overall coordination and monitoring of process compliance for School departments. Compliance including accounting (expense & visa processing), payroll processing, and purchasing are coordinated by the incumbent as a key contact.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	A proactive approach needs to be implemented to ensure this is enforced in a timely manner. Planning is involved with all stakeholders to ensure that policies are adhered to. This involves planning communiqué in advance and providing/reviewing documentation, attending meetings, coordinating activities of others to ensure policies and procedures are being followed. Time management skills and multitasking are critical as there are often conflicting and competing priorities at reporting deadlines.
List the types of resources required to complete this task, project or activity.	Expense directives, purchasing guidelines for both expense and capital purchases, purchasing manual for on-line requisitioning, communicating with the Purchasing and Accounting departments.
How is/are deadline(s) determined?	College-wide policies and deadlines as set by Finance/HR/Purchasing
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	The incumbent reviews for accuracy and completeness (i.e., expense reporting/visa reports/purchasing submissions & tenders) and is responsible for follow up with original source when changes are required. In cases where gaps or opportunities for process improvements are identified, the incumbent will make recommendations to the Academic Leaders and draft new policies or procedures, as requested. Examples include development of a VISA cardholder policy for programs (designed to reduce the number of cardholders in the school) and a procedure for development of fees for optional student trips (developed in response to significant over-spending on trips). For activities at the corporate level, Finance communicates directly with incumbent on process changes; the incumbent then recommends to Academic Leaders form to communicate changes to stakeholders at School.

#3 regular & recurring

List the project and the role of the incumbent in this activity.	School programs are asset intensive which requires proactive capital planning to meet future needs. Incumbent assists with the coordination and planning of long-term capital asset forecasts (i.e., 5-year capital plans). Incumbent works with School program teams and various cross-CCollege stakeholders to coordinate meetings, update information, and implement new processes. The incumbent works with program teams to ensure capital and equipment inventories are up to date, to determine future needs and to compile these data for planning.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Proactive approach; engagement with internal stakeholders; communication skills; coordination skills to ensure School staff comply with CollegeCollege policies and procedures. Time management, interpersonal skills, ability to effectively organize with multiple priorities and problem-solving skills.
List the types of resources required to complete this task, project or activity.	College policies and procedures, Academic Operations, Budget Services.
How is/are deadline(s) determined?	The Budget Committee determine the annual capital cycle timeline then Academic Operations determines annual reporting deadlines for the School. Academic Leaders would determine timeline for internal completion and milestone setting.
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.	Capital Committee would ultimately determine if changes occur in annual reporting or tracking processes. The Dean, School of Business & IT and/or Academic Chair, Continuing Education would communicate revised project expectations to incumbent. Incumbent would adjust timelines as appropriate and communicate revised plans to stakeholders

#1 Occasionally

List the project and the role of the incumbent in this activity.	Participates in the development of funding proposals (e.g., grant application, new program development, capital purchases, etc.). Incumbent modifies external templates to fit our curriculum data models; coordinates the collection of relevant information; schedules working meetings; and completes the final documentation for final sign-off by the Dean.
What are the organizational and/or project	The incumbent is required to establish and communicate

management skills needed to bring together and integrate this activity?	data requirements and deadlines for School staff to ensure funding partner timelines and Finance Department deadlines are met; attend meetings; follow up on progress to ensure that deadlines are being met; provide assistance as needed to remove barriers in achieving deadlines.
List the types of resources required to complete this task, project or activity.	Funding partner guidelines and templates Finance Department expertise
How is/are deadline(s) determined?	External funding partner sets the deadlines.
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	The incumbent monitors each step of the project to ensure milestones are met and makes adjustments as required to keep the project on track and meet the ultimate external deadlines. May be required to negotiate changes to subsequent stages (within the school or with other College departments) if unanticipated delays occur.

#2 Occasionally

List the project and the role of the incumbent in this activity.	Participates in and coordinates School's role in cross-College projects varying in complexity and deliverables which involve multiple stakeholders within the Academic Division while adhering to tight timelines. (i.e., Inventory Management Tool, capital database tool)
What are the organizational and/or project management skills needed to bring together and integrate this activity?	The incumbent meets with required Academic Leaders, Project Managers and Program Officers to confirm project outcomes, researches and develops approaches to the project and timelines and if any additional team members are needed. The incumbent designs a work plan and begins to develop approaches and solutions for approval of the academic leaders. Works with team and managers to implement the project and then monitors status for functionality and any modifications needed.
List the types of resources required to complete this task, project or activity.	Past practice, previous experience, College policies and procedures, incumbent research related to project needs and outcomes.
How is/are deadline(s) determined?	By the Academic Division Manager/Project Manager/Academic Chair assigned to the project.

Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	The Academic Division manager who is assigned to the project determines any changes required and what impact these changes have on others based upon the supporting analysis and documentation from the incumbent.

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. In the role of point of contact for operational matters, 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.	As new staff is hired, orientation to information (e.g., budgets and accounts to use), systems (e.g., BARS), and procedures (e.g., Visa processes) in College is necessary.
X		The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	Advises Faculty, Coordinators and Technologist(s) on correct financial, purchasing, capital and asset processes as requested. Determines revenue feasibility/cost modelling and provides data to information programming decision which

			impact students, accounting and facilities.
			Analyzes and monitors budget data and makes recommendations to Academic Leaders on discrepancies, improvements and opportunities for efficiencies.
X	☐	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	Actively involved in capital asset and inventory cycles by providing direction to technologist/faculty in securing needed equipment for program outcomes (i.e. Actively attending School program meetings for purpose of giving direction in how to determine needs, prioritize them, write a business case, price, and submit capital and emergency requests. Demonstrating expertise and providing guidance to achieve buy in from techs/faculty to secure equipment within the correct process with successful outcomes.
☐	☐	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. Initial instructions from the Dean, School of Business & IT will define the broad expectations, considerations and requirements for successful outcomes (e.g., ultimate deadlines, non-negotiable constraints and/or requirements, relationship sensitivities etc.). The incumbent is expected to work in a self-	Work assignments arising from team/committee decisions will incorporate guidance and direction from the committee relative to expectations, considerations and requirements for successful outcomes. Occasional assignment will be explained in more

directed manner and display considerable initiative and independent judgment through interaction and collaboration with others.	detail by supervisor
The incumbent may receive work from the Dean, School of Business & IT or other Academic Leaders based on current projects, but in more instances has freedom to create own work schedule, based on their own judgment. Routine tasks such as monthly VISA reporting and analysis and reporting of monthly BARS reports are expected to be completed without guidance or direction. Utilizes individual discretion in seeking guidance as required.	

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 (e.g., HR, Purchasing, Strategic Mandate and Vision for the College, Individual School Strategic Plan); however, latitude to make independent decisions is integral to this position and will be required regularly. Collective Agreements External Program Funding Guidelines Budget Principles and Accounting Procedures	Academic Schedule College Calendar Annual Academic Planning Cycle

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)
Work is checked periodically as required, by the Dean, School of Business & IT depending on the task or activity and cycle timing by report and/or discussion. Budget is reviewed by report and/or discussion as required (e.g., budget development, quarterly review and budget update) Work is discussed when exceptions arise and by update meetings/reports and/or can be discussed with Academic Leaders on an as-needed basis. Work can be reviewed at completion of various projects.	Feedback by other stakeholders provided to Dean Detailed review for specific issues at key periods.

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)
Incumbent must liaise with program coordinators, technologist(s), project managers, program officers and teams around capital asset needs for their program. Liaise with Academic Leaders around direction and/or expansion of programs. Complete capital cycle with liaising with technologist(s) and Purchasing around ability to acquire requested capital assets. Supports and gives guidance to faculty and technologist(s) in relation to financial, purchasing, inventory and asset management process compliance. This work requires frequent consultation with individuals involved in and/or affected by these activities. Independently meet with program teams to define program direction/needs to gain understanding needed for program budget creation decisions and ongoing monitoring.	The incumbent will work directly with Program Coordinators, Project Managers and faculty to develop costing scenarios to determine the viability of proposed changes going forward.

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)
Budget concerns/spending activity that are unplanned or unusual. Resolution of major project conflicts Interdependencies with other Fleming departments Creation/implementation of new processes and budget tools	Major budget variances with issues identified. Purchases of unanticipated equipment/items Capital Asset and Inventory Planning/issue resolution. Schedule changes Major deadline/workload conflicts. Staffing issues related to projects. Unresolved budget issues, issues that have escalated beyond the incumbent's authority, after a number of options have been attempted. Unresolved student/staff concerns and operational issues that will impact areas across other School.

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (if none, please strike out this section)
Proactively identifying and following up on budget deviations or unusual situations. This includes flagging coordinators and technologist(s) on overspending and discussing reductions etc.	Recommends and implements new processes and budget tools that assist with budget preparation and monitoring which ultimately contribute to increased accuracy and ease of analysis.
Making recommendations to improve efficiencies for the School budget and viability of the School.	
During budget preparation makes necessary changes to ensure balanced budget submission based on College policy and school mandate.	
Designs, develops and maintains robust tracking documents to assist coordinators/techs in understanding and monitoring their program costing.	
Determines appropriate allocation of program department expenses based on program enrolment.	
Uses data and analysis from costing scenarios to make recommendations regarding program viability.	
Determines appropriate mechanisms for tracking the status of various projects and determine follow up with various stakeholders, both internal and external to the dept.	
Make recommendations to Academic Leaders as to whether various purchases can be made or whether alternatives need to be considered.	
Determines record retention processes for budget.	
Adjusts calendars to schedule meetings for budget issues and ongoing financial monitoring. Requires an understanding of constantly changing priorities and deadlines and the ability to determine the impact of rescheduling meetings and events.	

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?		
Requests analysis and conclusion related to BARS and Academic Ops report variances and overall state of financial health	Incumbent gathers source data from variety of resources, analyses and arrives at conclusion. Information is then presented in timely manner and advice or counsel on rectifications if needed	Dean, Academic Chair,	M
Requests to conduct costing for purposes of program redesign or efficiency finding	Incumbent gathers source data from variety of resources, liaises with academic operations/ Academic Chair/ appropriate faculty, prepares costing and presents in timely manner	Dean, Academic Chair, Program Coordinators/Faculty	M
Key contact person for program department budget inquiries and issues related to financial, purchasing and budget process compliance	Incumbent provides information and guidance on College-wide process. Communication occurs electronically, verbally and through attendance of meetings (coordinator /tech/academic team. Liaising with finance/budget and purchasing to ensure process compliance and	Faculty, Technologist(s), Staff	D

	issue resolution.		
Request to complete budget cycle for submission to academic operations/budget services (preliminary/quarterly/update)	Incumbent receives all relevant material, disseminates information to programs, meets with program teams and leaders, updates and completes all relevant spreadsheets. Information is then presented to academic leaders for review and consultation. Revisions are then completed by incumbent. Process is time sensitive and completed in fast turnaround.	Academic Leaders, Budget Services	M
Requests to interpret agreements related to external revenue generating sources	Incumbent receives agreement from requestor, reviews it, may contact other resources and makes recommendations	Dean, Program Coordinator, Technologist(s), Academic Chair, Continuing Education	M
Proactively ensures Academic Programs and External Projects have sufficient supplies to support operational requirements.	Consult with faculty (clients) to gain understanding of needs and select appropriate equipment and supplies from available options to support learning.	Faculty/Simulation Coordinator/Academic Services Leader	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	Inquiries, general information,	Students, Parents,	W

		Public, /Community partners/stakeholders	
information, extending common courtesy	Exchanging information re meetings, budget processes, invoices, coverage during staff absences	Other College Departments/School	D
	Provide and solicit information; seek clarification; follow up on details related to functional responsibility; obtain enrolment information.	Academic Leaders, Coordinators, Faculty, Technologist(s)	D
	Provides training and orientation to new faculty and technicians re. team functioning, school and role familiarity.	New Employees	I
Explanation and interpretation of information or ideas	Monitoring, issue resolution, follow-up and reporting on the financial performance of 30+ program budgets, overall rollup of all School budgets including Continuing Education and Dean budget. Provides both written and verbal summary status reports.	Academic Leaders, Academic Chair, Continuing Education, Coordinators, Faculty, Technologist(s), Budget Services, Academic Operations	D
	Monitoring, issue resolution and follow up and reporting on capital assets/ inventory for School. Provides both written and verbal summary status reports.	Academic Leaders, Coordinators, Faculty, Technologist(s), Budget Services, Academic Operations, Advancement	W
		Academic Leaders, Faculty, Technologist(s), Financial Services	
	Review agreements related to external revenue and provide financial coordination through to completion		W/M
Imparting technical information and advice	Provide advice and counsel regarding process compliance	Faculty, Technologist(s), Staff,	D

including purchasing, budget & financial, asset & inventory to secure understanding.	Students, External Stakeholders,	
Provides advice and counsel regarding the budget cycle including establishment/development and monitoring to ensure budgets are attainable and reasonable. Also, through use of continual analysis and historical trends provides direction to highlight program spending variances.	Academic Leaders, AO, Budget Services	D
	Academic Leaders, Advancement, Purchasing, Faculty, Technologist(s)	M
Provide advice and counsel regarding capital assets including prioritization and resourcing funds outside of normal budgetary cycle.	Academic Leaders Faculty, Technologist(s), Financial Services, External Stakeholders	M
	Academic Leaders	W
Provides interpretation, review and input on agreements including leasing agreements, partnership agreements and potential grants/projects.	Academic Leaders, Faculty, Technologist(s), AO	M
Performing financial modelling through the collection of data from various sources College-wide, analysis and creation of assumptions used for decision-making.	Academic Leaders, Faculty AO, HR	M
Attendance and presentation at various meetings to impart information and advice on financial matters.	Academic Leaders, Faculty, Technologist(s), AO	M
Work closely with Academic leaders and faculty to obtain cooperation to implement strategic initiatives/ finding opportunities for efficiency/cost savings i.e., program delivery		

	redesign, IPP, CTO analysis		
	Recommends and introduces new processes or tools that assist with financial and budgetary matters working to obtain cooperation and consent for implementation		
Instructing or training			
Obtaining cooperation or consent			
Negotiating			

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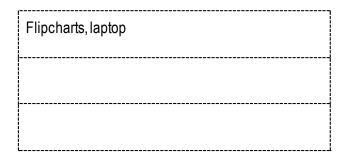
9. Physical Effort

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		
Lifting (light)	I	X			X		

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

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

X   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)

Flipcharts, laptop

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 (e.g., 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 (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 (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Data compilation, analysis. Reports are in various formats depending on the nature of the project with information being submitted from various sources requires significant concentration to ensure all details are captured correctly	D			X
Can concentration or focus be maintained throughout the duration of the activity? If not, why? □ X Usually – interruptions are not frequent □ No				

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Project status review and analysis. Analyzing the status of each project and the impact changes will have on other projects requires extended periods of concentration.	W		X	
Can concentration or focus be maintained throughout the duration of the activity? If not, why? □ X Usually – interruptions are not frequent □ No				

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs

Preparing and tracking budget including budget update, costing spreadsheets, while attending to information requests of leaders and staff and continuing to monitor and support financial process activities with other prescribed deadlines	W			X

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

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11. Working Environment

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

Working Conditions	Examples	Frequency (D, W, M, I)*
X acceptable working conditions (minimal exposure to the conditions listed below)	Normal 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		
□ travel		
□ working in isolated or crowded situations		
□ other (explain)		

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