

**Position Description Form (PDF)**

College: Sir Sandford Fleming

Incumbent's Name: VACANT

Position Title: SENRS Finance and Projects Officer

Payband: H

Position Code/Number (if applicable): S00356

Scheduled No. of Hours \_\_\_\_\_ 40 \_\_\_\_\_

Appointment Type: Full time Support

Supervisor's Name and Title: Tania Clerac, Dean/Principal, SENRS

Completed by: Tania Clerac

PDF Date: June 2022

**Signatures:**

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

Date:

Supervisor:

Date:

### Instructions for Completing the PDF

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

### Position Summary

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

Reporting to the Dean, SENRS, the incumbent's responsibility encompasses all aspects of the budget cycle for the preliminary budget, quarterly review and semiannual update which includes development, analysis, monitoring and reporting.

The position will also support operations and of projects and ongoing operations duties within the School of Environmental and Natural Resource Sciences, including planning and logistical support, implementation and administration, investigation of potential opportunities/activities, data collection, assisting with promotional events and execution of marketing strategies and maintaining effective relationships with external and internal stakeholders.

## 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*
<p><b>1. Operating Budget and Capital: Development, Analysis, Monitoring and Reporting</b></p> <ul style="list-style-type: none"> <li>• Responsible for all aspects of the SENRS operating budget cycle and capital planning including preliminary budget development, quarterly review, and semiannual update. Duties include budget development, analysis, monitoring and reporting while ensuring the budgets are reasonable and attainable. There are approximately 35 department budgets and approximately 20 project, advancement and special project budgets including external funding.</li> <li>• Prepares the preliminary, quarterly review and update budgets for review by the SENRS Leadership team prior to submission.</li> <li>• Works with Dean, Academic Chair, Operations Manager (SENRS Leadership Team) and other support staff to monitor faculty and technician payroll costing including reviewing TCH reports, SWF's, contract faculty contracts, technician and student employee contracts.</li> <li>• Responds to financial enquiries and operational matters on a day-to-day basis, through knowledge of internal processes and policies, analysis of issues, consultation with other staff, proactive problem solving and ongoing follow up.</li> <li>• Provides guidance to technologists and coordinators in the development of academic program course and supply fees in consultation with Finance and Registrar's office. Prepares fee summaries for approval and monitors expenses against fees collected.</li> <li>• Regularly meets with Program Coordinators, Technologists and the SENRS Leadership team to review budget to actual expenditures.</li> <li>• 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 enrolments and operating budgets. Works closely with the SENRS Leaders, Coordinators, Technologists and Budget Services to provide timely resolution to identified issues.</li> <li>• Assist in the investigation of new revenue sources and development of proposals.</li> <li>• Provides data and analytical support to Budget Services for program costing.</li> <li>• Supports program Coordinators with data required for Program Advisory Committee meetings and on an as needed basis.</li> <li>• Supports new program teams by providing advice and analysis as well as assisting with the creation of new program costing for Budget Services.</li> </ul> <p>Assists with the development of project business plans, financial plans and budgets of projects including ensuring profitability and appropriate staffing models</p>	35%

## 2. Project Management

30%

### Project Coordination

Proactive planning and coordination of projects. Develops project timelines and schedules in consultation with SENRS leadership. Ensures assigned tasks are completed on time and correctly. Maintains accurate project tracking and provides regular updates to the SENRS leadership team. Identifies project risks and maintains project risk register.

Coordinates the work of team members dedicated to the project and collaborates effectively to ensure team goals are achieved by providing input into decision making and problem solving. Provides project-specific training to staff working on the project as needed. Proactively plans details to support programming on- or off-campus including resource allocation, potential faculty, scheduling, marketing, required resources etc.

Records and summarizes data collected by the project team. Ensures quality control and quality assurance of project deliverables. Provides program development support including sourcing and recruiting faculty.

Implements the training projects set by SENRS leadership team. If applicable, creates required health and safety protocol documents for in-person training and ensures all protocols are followed by the project team and training participants.

Occasionally handles any urgent logistical issues regarding program delivery.

### Marketing and stakeholder relationships

Establishes and maintains positive, collaborative and effective relationships with stakeholders, community and industry partners. Facilitates training enrollment, ensures timely, concise and accurate response to stakeholder inquiries. Assists with stakeholder communication plans and their execution, promotional events, execution of marketing strategies and recruitment of training participants.

### Resourcing

- In collaboration with the SENRS Academic leadership, assists with recruiting, resourcing, orienting contract faculty and staff associated with the delivery of training initiatives.

### Reporting & Metrics

- The incumbent is responsible for ensuring timely and efficient communication with project stakeholders, including regular meetings, providing project evaluations and reports, as needed, and developing tools and processes for evaluating project activities, ensuring partner, stakeholder and client satisfaction, and successfully meeting project outcomes.

<b>3. Operational Support</b> <p><b>Safety</b></p> <ul style="list-style-type: none"> <li>Participates in safety related audits of the SENRS facilities and develops and maintains field related safety templates for programs.</li> </ul> <p><b>Animal Care Committee</b></p> <ul style="list-style-type: none"> <li>Document management and coordination of Animal Care Committee activities, including, but not limited to, scheduling meetings and Post Approval Monitoring site visits, main point of contact for inquiries, follow up with stakeholders, preparation of reports, coordinating training and onboarding of ACC members, ,</li> </ul> <p><b>Purchasing</b></p> <ul style="list-style-type: none"> <li>Primary point of contact for SENRS purchasing by providing oversight and guidance to program purchasing as well as day to day monitoring of the application of purchasing policies and procedures.</li> </ul> <p><b>Insurance</b></p> <ul style="list-style-type: none"> <li>Liaison with College Insurance and Risk office for clarification on insurance requirements for purchases of equipment and services</li> <li>Ensure all legal documents are reviewed by Insurance and Risk office.</li> </ul> <p><b>Advancement</b></p> <ul style="list-style-type: none"> <li>Liaison with Advancement and Financial Services to ensure the proper use of donated funds, and special project funding, and in a timely fashion.</li> </ul> <p><b>Research</b></p> <ul style="list-style-type: none"> <li>Work with the Office of Research and Innovation to ensure the proper allocation of resources to support SENRS research grants.</li> </ul> <p><b>Contract Review</b></p> <ul style="list-style-type: none"> <li>Review and track all external partnership agreements/contracts for SENRS. Ensure the proper departments review the agreement and the contract is signed by the appropriate signing authority.</li> <li>Provides back-up support to other members of the SENRS Dean's Office team</li> </ul>	30%
<b>4. Other Duties:</b> <ul style="list-style-type: none"> <li>Performs other duties as assigned.</li> <li></li> </ul>	5%

\* To help you estimate approximate percentages:

½ hour a day is 7%

1 hour a day is 14%

1 hour a week is 3%

½ day a week is 10%

½ day a month is 2%

1 day a month is 4%

1 week a year is 2%

## 1. Education

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

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

- ☒ 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
- ☐ Minimum of three (3) years
- X Minimum of five (5) years

Progressive administrative support and 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 Microsoft software and ERP systems (i.e. Oracle/Peoplesoft information systems).

Experience working independently as well as within a team environment.

Experience organizing and prioritizing own work, designing and implementing action plans in a deadline oriented 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 coordinating several project components simultaneously.

Experience building and maintaining relationships is essential. This will be maintained through various mediums including email, meetings and telephone. The incumbent must have superior written communication and interpersonal skills to liaise tactfully and diplomatically with multiple stakeholders both externally and within the School and other college departments.

Experience purchasing within the Broader Public Sector environment.

Experience within a post-secondary institution would be considered an asset.

- ☐ 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 variances between the projected budget and the actual results. 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 SENRS Leaders and/or Program Coordinators and Technologists, 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 SENRS 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 SENRS Leaders to make an informed decision as to how to modify the remaining budget. In cases of significant gaps, the incumbent suggests 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, budget template review and tracking performed by the incumbent to identify areas currently underspent or where opportunities may exist to offset problems.

## #2 regular & recurring

Key issue or problem encountered

The incumbent tracks the progress of projects over a specified timeframe. As issues arise which affect timing and/or potential outcomes, the project timing and/or planned activities must be adjusted and consequent issues flagged and/or followed up on. Example: A project plan was developed for the development and delivery of SAO training. The on-going work is undertaken by a small project team involving faculty and staff. An initial project team meeting confirmed responsibilities and authorities for the team. Thereafter the incumbent monitors the progress of the project to ensure that the project objectives are being achieved and facilitates corrective action if and where required.

How is it identified?

Typically, during team meetings and/or when project stakeholders independently flag arising issues.

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

Yes, checking with other areas/individuals to assess and establish adjustments to project plans. Must evaluate the nature of each project plan change to determine what effect it will have on others and on project outcomes.

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

Communication with others and arranging a mutually acceptable solution. The incumbent will provide recommendations to SENRS Leaders for changes to project plans.

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

Past practice primarily, advice from responsible project personnel and from SENRS Leaders, project agreements

### #3 regular & recurring

Key issue or problem encountered

Budget constraints and competing demands for resources among various programs and projects require incumbent to monitor and analyze operations and project budgets to find opportunities for efficiency and cost savings. The incumbent analyzes data and makes suggestions to reduce costs (ie. sharing of buses between programs, purchasing power opportunities, analysis of camp costs). Proactive issue identification and resolution is key to SENRS operations.

How is it identified?

Faculty/SENRS Leaders forward proposal for program or delivery 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, technologists, 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 camps and program supplies, incumbent must gather data from ledger, invoices, faculty/technologists and purchasing which are compiled and reviewed for detailed analysis. The incumbent recommends course of action for final approval by the SENRS 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 (Cube, 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)? (eg. past practices, established standards or guidelines).

SENRS Leaders, faculty and technologists 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. SENRS, with an applied learning focus, has many off-site overnight camps run annually. Further there are multiple international optional trips that run annually and supply fees submitted for approval. The incumbent works to compile data from various sources, analyzes for compliance with Ministry 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. Optional course fees such as international trips can occur at any time throughout the year with the request done by faculty, once approved by SENRS Leaders.

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 technologists 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)? (eg. past practices, established standards or guidelines).

Historical data, Budget Services, Purchasing policies and SENRS 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, SENRS 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 technologists or faculty members identify issue or request for asset. Requests can also be forwarded from SENRS Leaders.

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

Incumbent will meet with tech/faculty 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 problem solve. Liaising with various stakeholders and communicating back with tech/faculty to ensure problem is resolved. Makes recommendation for next step to SENRS Leaders.

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

Knowledge of college standards and past practices.  
Ongoing communication with staff members in other areas of the College (ie. Advancement, purchasing, budget services, AO)

### #3 Occasional

Key issue or problem encountered

The incumbent is responsible for assisting in the development of the agenda for meetings with project and industry partners, including coordinating the attendance of internal contacts from other departments. The challenge is securing commitment from the key contacts as identified, to be available on the date and time specified. In addition, there are times when the agenda and timelines have been developed and all key contacts confirmed, and one of the attendees advises that due to a conflict, they are unable to attend.

How is it identified?

Under the guidance of SENRS Leaders the incumbent develops an on-going list of people and items for meetings. The incumbent will SENRS Leaders with this list and working together, will prioritize the list, identifying items by importance and timelines. This facilitates the development of a draft agenda for the upcoming meeting(s).

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

The incumbent will contact the invitees to determine and confirm their availability for the date and time of the meeting before the agenda can be finalized. In the event one of the invitees cancels prior to the meeting date, the incumbent, in consultation with SENRS Leaders, will follow the same procedure.

An alternative date might need to be determined. Once confirmed, all people concerned will be advised of any changes.

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

Communication with SENRS Leaders and the invitees (or their support) is key, to find a mutually acceptable date and time for the invitees to attend and to ensure the invitees is briefed on the details of the agenda item.

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

Using tools such as electronic calendars, faculty timetables, and the academic schedule, the incumbent can review the potential availability of targeted invitees. It is important, however, to contact the invitee directly (or their support), to confirm that the date and time and to clarify the details of the agenda item and what they need to be prepared to discuss.

#### 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/updates and project budgeting 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 SENRS 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 SENRS budget development process involves meeting with representatives from approximately 35 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, develop and refine submissions, follow up on progress, and determine any adjustments needed to ensure deadlines are met. Advance planning and coordination is particularly critical to plan for meetings with the SENRS 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 SENRS 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 SENRS 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 supports the planning, scheduling and delivery of various training projects.

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

As the incumbent works on concurrent projects, they must be extremely organized and follow each project through the project life cycle including, design, development, implementation, and evaluation.

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

Resources include clerical support, consultation with SENRS Leaders, College policies and procedures, ministry standards, computer with standard office applications and access to Internet, project management plan, reporting and deliverables templates

How is/are deadline(s) determined?

Deadlines are determined at the time of project start up, and are identified by the SENRS Leaders

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 determines the requirement for changes and s/he determines whether they have an impact on others. Required changes will be discussed with SENRS Leaders.

## #3 regular & recurring

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

SENRS is an asset intensive school which requires proactive capital planning to meet future needs. Incumbent assists SENRS Leaders in the coordination and planning of long-term capital asset forecasts (ie 5 year capital plans). Incumbent works with SENRS program teams and various cross college 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 SENRS staff complies with college 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 schools. SENRS 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 SENRS leaders 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. 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 SENRS Leaders.

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

The incumbent is required to establish and communicate data requirements and deadlines for SENRS 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 SENRS' role in cross college projects varying in complexity and deliverables which involve multiple stakeholders within the Academic Division while adhering to tight timelines.

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

The incumbent meets with required Academic Leaders to confirm project outcomes, researches and develops approaches to the project and timelines and if any additional team members are needed. S/he 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 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.

## #3 Occasionally

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

Under the guidance of the Operations Manager, the incumbent is responsible for the co-ordination of the Animal Care Committee's (ACC) activities, and is an active and voting member of the ACC.

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

Activities include an understanding of the CCAC as well as the Animal Use Protocols (AUPs), Standard Operating Procedures (SOPs) and Post Approval Monitoring (PAM) reports. Incumbent must have a full understanding of the timing for completion and approval of these documents. Incumbent must be skilled at managing and developing timelines to ensure critical dates are met, i.e. completion and updates of AUPs, and coordinating the ACC meetings (including a number of external members) to review and approve AUPs prior to activities. The incumbent will be required to consistently follow up with animal users who already have a heavily committed workload, to ensure documents are reviewed and updated for ACC review and approval on a timely basis. The incumbent will need to have excellent document management skills to ensure currency of documents and easy access by all stakeholders.

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

Human resources include Fleming technologists and faculty who are animal users, SENRS Leaders and varied staff including Physical Resources. Incumbent is a key contact for the CCAC, and will collaborate with the CCAC for guidance and information as required. Additional resources are available through the CCAC website.

How is/are deadline(s) determined?

Deadlines for approvals on AUPs are determined by the dates of activities, Fleming College's Animal Care Policy and Procedures and for some AUPs, by the date the MNR permit is required.

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.

As an active member of the ACC, the incumbent would collaborate with the ACC Chair, Co-ordinator and Veterinary to make minor changes. The ACC Terms of Reference govern that major changes require a quorum vote (50% + 1) by the members of the ACC. For changes to ACC membership, the incumbent would research and prepare information on new members being considered, for approval by the Vice-President Applied Research who oversees Fleming's ACC.

## 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
X		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.	Explains procedures to complete project deliverables to project members Advises others on the availability of SENRS Leaders for various meetings. Provide advice about appropriate accounts and departments to be charged for purchases and/or staffing related to the Principal's budget.
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 are 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 Technologists 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 SENRS Leaders on discrepancies, improvements and opportunities for efficiencies.

Makes suggestions regarding project requirements so that other employees and externally contracted persons can complete project activities.

Recommends requirements and timelines of project to faculty, internal departments and external project partners

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

☐☐

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)
<p>Typical work assignments are carried out independently. Initial instructions from the SENRS Leaders will define the broad expectations, considerations and requirements for successful outcomes (e.g. ultimate deadlines, non-negotiable constraints and/or requirements, relationship sensitivities etc.).</p> <p>The incumbent is expected to work in a self-directed manner and display considerable initiative and independent judgment through interaction and collaboration with others.</p> <p>The incumbent may receive work from the SENRS Leaders 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, various analysis, and reviewing of monthly BARS reports are expected to be completed without guidance or direction. Utilizes individual discretion in seeking guidance as required.</p>	<p>Work assignments arising from team/committee decisions will incorporate guidance and direction from the committee relative to expectations, considerations and requirements for successful outcomes</p> <p>Occasional assignment will be explained in more detail by supervisor</p>
What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (if none, please strike out this section)

<p>College Policies &amp; 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</p> <p>Collective Agreements External Program Funding Guidelines Budget Principles and Accounting Procedures</p> <p>Project contracts (usually containing the deliverables, timelines, and budgets in the proposals) are used to guide the projects.</p>	<p>Academic Schedule College Calendar Annual Academic Planning Cycle</p>
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How is work reviewed or verified (eg. feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional (if none, please strike out this section)
<p>Regular meetings with SENRS Leaders</p> <p>Work is checked periodically as required, by the SENRS Leaders depending on the task or activity and cycle timing by report and/or discussion</p> <p>Budget is reviewed by report and/or discussion as required (eg. budget development, quarterly review and budget update). Work is discussed when exceptions arise and by update meetings/reports and/or can be discussed with the SENRS Leaders on an as-needed basis. Work can be reviewed at completion of various projects.</p>	<p>Feedback by other stakeholders provided to SENRS Leaders</p> <p>Detailed review for specific issues at key periods.</p> <p>Pilot testing will verify work if it is a deliverable of the project.</p> <p>Feedback sessions with industry and community partners</p>

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor?	
Regular and Recurring	Occasional (if none, please strike out this section)

<p>Incumbent must liaise with program coordinators, technologists and teams around capital asset needs for their program. Liaise with SENRS Leaders around direction and/or expansion of programs. Complete capital cycle with liaising with technologists and Purchasing around ability to acquire requested capital assets.</p> <p>Supports and gives guidance to faculty and technologists 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.</p> <p>Independently meet with program teams to define program direction/needs to gain understanding needed for program budget creation decisions and ongoing monitoring. Also meet with program teams for decision making in the ancillary/course/supply fee creation and ongoing monitoring.</p> <p>Adjust scheduling of internal and external meetings, outreach sessions, recruitment events;</p>	<p>The incumbent will work directly with Program Coordinators and faculty to develop costing scenarios to determine the viability of proposed changes going forward.</p> <p>Change of tracking and documentation of project components</p>
<p>Describe the type of decisions that would be decided in consultation with the Supervisor.</p>	
<p>Regular and Recurring</p>	<p>Occasional (if none, please strike out this section)</p>



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

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 technologists on over spending and discussing reductions.	Recommends and implements new processes and tools that assist with budget preparation and monitoring and tracking of projects.
Making recommendations to improve efficiencies for the SENRS budget	
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 School	
Make recommendations to SENRS Leaders as to whether various purchases can be made or whether alternatives need to be considered.	
Determines record retention processes for budget and projects	
Adjusts calendars to schedule meetings for budget issues, ongoing financial monitoring and project meetings. Requires an understanding of constantly changing priorities and deadlines and the ability to determine the impact of rescheduling meetings and events.	
Implements project plan and processes	
Ensures roles of project team members are clear	

## 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	SENRS Leaders	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/ chair/ appropriate faculty, prepares costing and presents in timely manner	SENRS Leaders, Program Coordinators/Faculty	M
Key contact person for 30+ program department budgets inquiries, training delivery 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 issue resolution.	Faculty, Technologists, Staff, SENRS Leaders	D

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.	SENRS 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	SENRS Leaders, Program Coordinator, Technologists, Financial Services, Advancement	M
Email, phone call or request during meeting to provide update on project deliverables	Incumbent either provides information immediately or follows up through email or in-person conversation	Project partners SENRS Leaders Internal departments	W
Email, phone call or request during meeting regarding training development and delivery (e.g. scheduling, logistics, marketing, registration etc)	Incumbent either provides information immediately or follows up through email or in-person conversation	Project partners Community members, external organizations, industry partners SENRS Leaders, Internal departments	D
Email, phone call or request during meeting to provide update on project deliverables	Incumbent either provides information immediately or follows up through email or in-person conversation	Project partners SENRS Leaders Internal departments	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)*
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Exchanging routine information, extending common courtesy	Inquiries, general information	Students, Parents, Public, Community partners/stakeholders	W
	Exchanging information re meetings, budget processes, invoices, coverage during staff absences	SENRS Leaders, Coordinators, Faculty Technologists, Other College Departments/schools	D
	Provide and solicit information; seek clarification; follow up on details related to functional responsibility;	SENRS Leaders, Coordinators, Faculty, Technologists	D
	Administration, project partners and internal departments requesting information pertaining to programs or projects	Administration Team Project Partners Internal Departments New Employees	D
	Provides training and orientation to new faculty and technicians re. team functioning, school and role familiarity.		I

Explanation and interpretation of information or ideas	Monitoring, issue resolution, follow-up and reporting on the financial performance of 35+ program budgets, training delivery budget and overall rollup of all SENRS budgets . Provides both written and verbal summary status reports	SENRS Leaders, Coordinators, Faculty, Technologists, Budget Services, Academic Operations, Purchasing, Accounting	D
	Monitoring, issue resolution and follow up and reporting on capital assets/ inventory for SENRS. Provides both written and verbal summary status reports	SENRS Leaders, Coordinators, Faculty, Technologists, Budget Services, Academic Operations, Advancement, Purchasing	W
	Review agreements related to external revenue and provide financial coordination through to completion	SENRS Leaders, Faculty, Technologists, Financial Services, Advancement	W/M
	Explain project requirements to members of project team and other stakeholders	SENRS Leaders, External projects partners, project members, internal departments	W

Imparting technical information and advice	Provide advice and counsel regarding process compliance including purchasing, budget & financial, asset & inventory to secure understanding.	Faculty, Technologists, Staff, Students, External Stakeholders	D
	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.	SENRS Leaders, AO, Budget Services, Technologists, Coordinators	D
	Provide advice and counsel regarding capital assets including prioritization and resourcing funds outside of normal budgetary cycle	SENRS Leaders, Advancement, Purchasing, Faculty, Technologists	M
	Provides interpretation, review and input on agreements including partnership agreements and potential grants/projects	SENRS Leaders Faculty, Technologists, Financial Services, External Stakeholders	W
	Performing financial modelling through the collection of data from various sources college wide, analysis and creation of assumptions used for decision making	SENRS Leaders	M
	Attendance and presentation at various meetings to impart information and advice on financial matters and project status	SENRS Leaders, Faculty, Technologists, AO, external stakeholders	W



	Work closely with SENRS leaders and faculty to obtain cooperation to implement strategic initiatives/ finding opportunities for efficiency/cost savings ie program delivery redesign, CTO analysis	SENRS Leaders, Faculty, internal departments	M
	Recommends and introduces new processes or tools that assist with financial and budgetary matters working to obtain cooperation and consent for implementation	SENRS Leaders, Faculty, Technologists, AO	M
Instructing or training	present various training sessions to enhance financial knowledge of processes, policies and budget template	SENRS Leaders, Technologist, faculty	I
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		
Lifting (medium)	I	X			X		

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

☒ Light (up to 5 kg or 11 lbs)

Laptop, files, portable projector

☒ 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
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?				
<input type="checkbox"/> Usually				
<input checked="" type="checkbox"/> No— Interruptions are frequent and incumbent is responsible for other time-sensitive responsibilities during this work. The ability to successfully multi-task is critical.				

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? <input type="checkbox"/> Usually X No – Interruptions are frequent and incumbent is responsible for other time-sensitive responsibilities during this work. The ability to successfully multi-task is critical.				

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 monitoring 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? <input type="checkbox"/> Usually x No – Interruptions are frequent and incumbent is responsible for other time-sensitive responsibilities during the time of preliminary and update budget work. The ability to successfully multi-task is critical.				
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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
<input type="checkbox"/> accessing crawl spaces/confined spaces		
<input type="checkbox"/> dealing with abusive people		
<input type="checkbox"/> dealing with abusive people who pose a threat of physical harm		
<input type="checkbox"/> difficult weather conditions		
<input type="checkbox"/> exposure to extreme weather conditions		

<input type="checkbox"/> exposure to very high or low temperatures (e.g. freezers)		
<input type="checkbox"/> handling hazardous substances		
<input type="checkbox"/> smelly, dirty or noisy environment		
X travel	Travel to and from Sutherland campus	I
<input type="checkbox"/> working in isolated or crowded situations		
<input type="checkbox"/> other (explain)		

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