

Position Description Form (PDF)

College: Sir Sandford Fleming

Incumbent's Name: VACANT

Position Title: Financial Planning & Budget Analyst

Payband: I

Position Code/Number (if applicable): S00086

Scheduled No. of Hours _____ 37.5 _____

Appointment Type: 12 months less than 12 months

Supervisor's Name and Title: Leah Koehler, Manager, Financial Planning & Analysis

Completed by: Leah Koehler

PDF Date: December 15, 2023

Signatures:

Incumbent:

Date:

(Indicates the incumbent has read and understood the PDF)

Supervisor:

Date:

Instructions for Completing the PDF

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

Position Summary

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

The Financial Planning & Budget Analyst reports to the Manager, Financial Planning & Analysis and is responsible for a broad range of duties in support of financial planning, financial reporting, and financial management for the College. Responsibilities include: (a) capital asset management – the incumbent is responsible for capital budgeting and all financial reporting associated with capital assets, (b) budgeting – the incumbent is responsible for budgeting and analysis of non-academic departments, including directing budget managers, budget performance monitoring, and forecasting and (c) developing and performing complex financial data modeling and treasury operations analysis. The information prepared by the incumbent is critical to provide College users with accurate financial information to make various financial sustainability and strategic decisions.

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>Budget Creation</p> <ul style="list-style-type: none"> • Educates and assists budget managers on use of budget forms and answers questions, trouble shoots issues, provides recommendations. • Supports the complete development of the college financial plan. • Responsible for working with the budget services team to continuously update the budget workbook template packages to reduce risk of errors, improve user experience, and improve efficiencies. • Responsible for calculating salaries and benefits for budgeting of staffing plans. Must be aware of and estimate potential changes in salaries and benefits. • Provides client support in budget development. • Performs detailed analysis and investigation of submitted budgets to ensure accurate budget reporting • Recommends to Manager, Financial Planning & Analysis actions concerning budgeting process incl. College-wide initiatives (e.g., budgeted salary savings, system enhancements, major projects etc.). 	25%
<p>Financial Analysis</p> <ul style="list-style-type: none"> • Provides ongoing support to budget managers in budget performance monitoring and forecasting. Supporting clients includes ongoing meetings to review spending, encumbrances, outstanding journal entries, and other adjustments with particular emphasis on providing accurate and meaningful year-end projections. • Analyzes and reports on budget vs. actual and budget vs. forecast. Advises on the financial implications to the College wide financial plan. • Acts as an advisor to budget managers, including training of departmental staff in the use of BARS reports, Evolve queries, and in particular the importance of forecasting etc. • Monitor and prepare detailed analysis on year-to-date budget variances, perform monthly account reconciliations for areas that the incumbent is responsible. This includes performing complex financial data modelling and analysis. • Support the annual audit by preparing working papers and detailed analysis for areas that the incumbent is responsible for. 	30%

Capital Asset Management

Asset Management

- Acts as the key contact and resource to oversee, track and provide guidance on the College capital asset listing. This full lifecycle management includes tracking the purchasing progress, costs, and key characteristics of the assets, and key internal controls over these functions.
- Coordinates cross college capital projects from a finance perspective and provides financial reconciliations and analysis to assist other departments. The incumbent coordinates the holdback process for any such capital projects requiring holdbacks in accordance with the Construction Act.
- Responsible for coordinating the College asset disposal process. This includes providing guidance to all of the departments on the College policy and required documentation. The incumbent is responsible for the financial reconciliation of asset disposals.

Asset Reporting

- Monitor and perform monthly account reconciliations for capital and deferred capital contributions.
- Support the annual audit by preparing working papers and detailed analysis for capital and deferred capital contributions.
- Prepares financial reporting and is the key audit contact for various external capital funded projects. Advises and works with budget managers as well as funding agencies to ensure accurate information and funding is utilized where possible.

Asset Planning/Budgeting

- Assists with the management of the capital asset budget for the College. Maintains capital lists and approval numbers. Assists in the development of the approved capital list, including determining amount to allocate to capital budget, managing the various departmental asks, prioritization of asks relative to funds available and summarizes overall capital budget.
- Liaises with budget managers and purchasing department to keep the capital budget updated based on in-year changes, issued purchase orders, etc. Advises budget managers which department/accounts to use for purchase orders to ensure that encumbrances are accurate on BARS reporting. Follows up with budget managers on spending updates.
- Develops a five-year College capital projection with input from the Finance leaders.
- Responsible for capital reporting of budget, budget update and 5-year capital plan within CFIS (the provincial consolidation tool).

25%

<p>Financial Sustainability, Treasury and Special Projects</p> <ul style="list-style-type: none"> • Undertakes comprehensive analysis regarding key projects supporting financial sustainability of Fleming. This work is critical to the continued financial health of the institution. Examples could include financial efficiency, PSAB projects, evaluation of capital projects, key overhead spend metrics and benchmarking, etc. • Assists in planning and executing treasury operations, including optimization of cash to GIC ratio based on expected cash flow forecasts, forward planning of major cash outflows (e.g., Fleming College Toronto operations), and interest income optimization. 	<p>15%</p>
<p>Other related duties as assigned</p>	<p>5%</p>

- * To help you estimate approximate percentages:
- | | | |
|---------------------|---------------------|---------------------|
| ½ hour a day is 7% | 1 hour a day is 14% | 1 hour a week is 3% |
| ½ day a week is 10% | ½ day a month is 2% | 1 day a month is 4% |
| 1 week a year is 2% | | |

1. Education

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

- Up to High School
- 1 year certificate
- 2 year diploma
- Trade certification
- 3 year diploma / degree
- 4 year degree or 3 year diploma / degree plus professional certification
- Post graduate degree (e.g. Masters) or 4 years degree plus professional certification
- Doctoral degree

Field(s) of Study:

Accounting/Business focus
Admitted to the CPA Professional Education Program (CPA PEP) and actively pursuing the CPA designation; preference will be given to candidates who have a CPA designation or who have completed the CPA Common Final Examination (CFE)

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.

<input type="checkbox"/> Less than one (1) year	
<input type="checkbox"/> Minimum of one (1) year	
<input type="checkbox"/> Minimum of two (2) years	
<input checked="" type="checkbox"/> Minimum of three (3) years	<p>Progressive financial experience in a computerized accounting environment including budget preparation, financial analysis, project planning, process design/enhancement, and financial management.</p> <p>Experience using advanced database skills and spreadsheet skills including maintain databases, running queries and preparing complex and advanced reports in excel.</p> <p>Excellent communication and interpersonal skills.</p> <p>Experience working independently in a team environment, proactively solving complex problems and training others in obtaining Peoplesoft financial information and using business intelligence tools.</p> <p>Experience organizing and prioritizing own work, designing and implementing action plans in a deadline oriented customer service environment.</p> <p>Experience using a variety of computer software including word processing and website maintenance.</p> <p>Experience proactively identifying potential problems related to financial and system data.</p>
<input type="checkbox"/> Minimum of five (5) years	
<input type="checkbox"/> 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 position is responsible for the planning and reporting of all capital assets in the College. There are indicators mid-year that the capital asset spending for the Ministry funded capital is below the ministry grant. The Ministry requires that all unspent funds be returned which is not optimal to the College. The incumbent must accurately forecast spending and then recommend suggested plan to Manager for next steps to ensure Ministry funding is fully spent.
How is it identified?	Identification of the variance is determined through monthly preparation of the capital asset account reconciliation, review of outstanding capital encumbrances and updated reporting of such within the College capital asset listing.
Is further investigation required to define the situation and/or problem? If so, describe.	Further investigation is required to determine if there has been an error from another finance team member (e.g. capital asset accidentally posted to an operating department). If no error is identified, the incumbent will liase with budget managers and purchasing to confirm that there are no other capital updates that they are aware of (e.g. purchase order in progress).
Explain the analysis used to determine a solution(s) for the situation and/or problem.	The incumbent will use multiple sources of financial information including BARS report actuals and purchasing encumbrances to assist. After initial financial analysis and ruling out errors, the incumbent will review the Ministry guidelines and make a suggestion on other projects that could be reallocated to utilize the Ministry funding. Once recommendation is agreed between Finance and Facilities, the incumbent will liase with the Ministry to request this change.

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

The Ministry provides guidelines for the projects, however they are sometimes vague. The incumbent can contact the Ministry to help with the interpretation of these principles, but it is still often open to interpretation and may require further negotiation with the Ministry to obtain desired result (further grant funding).

3. Analysis and Problem Solving

#2 regular & recurring

Key issue or problem encountered

Board report shows an unfavourable or favourable variance.

How is it identified?

Incumbent identifies the variance through preparation of the board report variance analysis. However, in some instances no variance is apparent but an unfavourable situation may be occurring and is being masked due to various situations such as system changes, timing changes etc.

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

Further investigation is required to establish if indeed the unfavourable or favourable variance (or no apparent variance) is real or due to timing. In-depth understanding of revenue and expenditure changes and system changes from one year to the next and the impact on current situation is required.

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

Through investigation and research it is established that the variance is real then the situation needs to be communicated to the budget manager and a plan of action to remedy the situation will need to be negotiated.

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

General principles of not exceeding the budget. Working in conjunction with the budget manager to find solutions to the current situation.

#3 regular & recurring

Key issue or problem encountered

In analyzing a budget, the incumbent identifies that contract salaries appear to be high as compared to budget

How is it identified?

Through analysis of budget and year-to-date expenditures by incumbent.

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

Incumbent flags problem with budget holder and then accesses source data such as contracts, payroll, enrolment #s, to determine why the amount is out of line.

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

Incumbent retrieves data and then compares in detail the actual transactions to the Budget forecast to identify discrepancies.

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

Evolve data/reports employee contracts, workloading reports.
Requires a case-by-case analysis.

3. Analysis and Problem Solving

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

Key issue or problem encountered

Department identifies a requirement for an in-year capital asset. The capital purchase was not in the preliminary budget.

How is it identified?

The capital need is brought forward to the incumbent.

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

The incumbent will first confirm whether the capital item was part of preliminary budget by comparing to the original capital request forms. If not on the budget, the incumbent will conduct analysis below.

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

The incumbent will explore various different options with the department including review of existing capital purchases and forecasting those purchases to determine if there is budget that can be reallocated, reviewing if there are underspends in other departments that can be reallocated, or if there are any special funds available to cover the cost. The incumbent's process will include determining whether the asset meets the Colleges internal capitalization threshold as well as determining if the asset meets capitalization requirements in accordance with public sector accounting standards.

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

Capital decision making guide on budget services website
College capital policy & procedure

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

Key issue or problem encountered

The College is considering a large strategic investment opportunity and is unsure of the future cash flow implications.

How is it identified?

The initial problem is brought forward by finance management.

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

The incumbent will complete complex financial modelling for each strategic investment opportunity to determine short term and long-term cash flow requirements as well as impact on financial forecasting (e.g. amortization, deferred capital contributions).

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

Analysis includes the development of the above models and will utilize historical financial averages as well as industry comparisons where data is not readily available.

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

Each model will be unique and therefore require new solutions.

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.	Preliminary and update budget process for non-academic departments.
What are the organizational and/or project management skills needed to bring together and integrate this activity?	The incumbent must determine the components of the budget (revenues, salaries, non-salary expenses) and develop details to support the budgets. This requires their coordination of the activities by meeting with various budget managers, support staff and departments that hold the information within the organization. Deadlines and explanations of the specific requirements for each component must be planned and communicated by the incumbent so the budget deadline can be met.
List the types of resources required to complete this task, project or activity.	The incumbent must ensure that the human resources requirements are committed to meeting their deadlines so that overall the final budget deadline can be met.
How is/are deadline(s) determined?	The final deadline is determined by the board of governors. The individual component deadlines are determined by the incumbent in consultation with the Finance 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 if changes are required if the budget provided does not meet the funding guidelines. The incumbent would make changes to the various deadlines of others. If one component could not be completed on time then the incumbent would have to determine if other parts of the budget could be rescheduled to avoid running out of time at the end to meet the budget deadline.
#2 regular & recurring	
List the project and the role of the incumbent in this activity.	Consolidation with the Province of Ontario has required a more thorough analysis of the financial information to provide the additional information in the required level of detail and format.

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

The deadline for this information is very tight and during year end which is a peak period for budget, enrolment audit and CFIS information, which makes planning and organizational skills key. It is critical that the incumbent have a plan for gathering information required from the various departments in order to provide the level of detail required in the time required.

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

The incumbent requires various financial details from most departments within the College.

How is/are deadline(s) determined?

Internal deadlines are determined by the incumbent and the final deadlines are based on reporting requirements and audit availability.

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 audit timing may determine that changes are required to the schedule. The audit must be complete before the final information for consolidation can be finished. The incumbent is required to interpret the guidelines to ensure the financial information is translated and reported properly to MTCU who in turn reports to the province.

4. Planning/Coordinating

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

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

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

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

How is/are deadline(s) determined?

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.

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

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

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

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

How is/are deadline(s) determined?

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.

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
<input type="checkbox"/>	<input type="checkbox"/>	Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	
X	<input type="checkbox"/>	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	The incumbent will need to meet with new managers to review budget documents and provide guidance in filling out the documents.
X	<input type="checkbox"/>	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	During budget development and in the monitoring phases that follow, the incumbent provides counsel, advice and guidance to managers and financial officers including use of system reports, interpretation of complex reports, recording options, modelling budgets/project costs, etc."
<input type="checkbox"/>	<input type="checkbox"/>	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.	
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in the position. Consideration is to be given to the degree of freedom and constraints that define the parameters in which the incumbent works.

What are the instructions that are typically required or provided at the beginning of a work assignment?	
Regular and Recurring	Occasional (if none, please strike out this section)
Typical work assignments are carried out independently with broad objectives and outcomes previously agreed to in consultation with the Manager, Financial Planning & Analysis.	

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (if none, please strike out this section)
<p>Generally none as a number of the functions are unique in nature. The incumbent has the ability to develop the required process to reach the stated objective. Ministry guidelines, CFIS guidelines and the prior years' files may be referred to. These are referred to when there are new or changed situations, but only provide general guidelines and usually are not helpful or relevant for the most part.</p> <p>Budgets which tend to have more unique problems require referring to previous solutions, which often have to be customized or establishing new solutions.</p> <p>College Policies & Procedures are available for some tasks, e.g. asset management.</p>	

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

6. Independence of Action

Describe the type of decisions the incumbent will make in consultation with someone else other than the Supervisor?	
Regular and Recurring	Occasional (if none, please strike out this section)
Incumbent determines with budget manager the information required. The incumbent would then develop and design the report or spreadsheet required for analysis. Incumbent determines any additional audit evidence required in consultation with the auditor.	

Describe the type of decisions that would be decided in consultation with the Supervisor.	
Regular and Recurring	Occasional (if none, please strike out this section)
Major budget variances with issues identified. Major deadline/workload conflicts that will require significant time commitment & be assessed against other priorities. Major systems issues that will require major procedural changes.	

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (if none, please strike out this section)
Development of data analysis and reporting mechanisms . Pro-actively identifying and following up on unusual situation and/or budget deviations. Providing resolution or recommendations on a continuous basis. System design for budget Determining data integrity and reasonableness checks and levels of acceptable variance.	
Identification of process design issues; mapping and making recommendations for process improvement.	

7. Service Delivery

This section looks at the service relationship that is an assigned requirement of the position. It considers the required manner in which the position delivers service to customers. It is not intended to examine the incumbent's interpersonal relationship with those customers and the normal anticipation of what customers want and then supplying it efficiently. It considers how the request for service is received and the degree to which the position is required to design and fulfil the service requirement. A "customer" is defined in the broadest sense as a person or groups of people and can be internal or external to the College.

In the table below, list the key service(s) and its associated customers. Describe how the request for service is received by the incumbent, how the service is carried out and the frequency.

Information on the service		Customer	Frequency (D, W, M. I)*
How is it received?	How is it carried out?		
Inquiries about budget, expenditures or financial models are typically received verbally, via email, or in person.	The incumbent clarifies the request through questioning and then works independently to conduct necessary data extraction, analysis and response. Incumbent would use this opportunity to train clients on how BARS reports work and how to access information independently.	All employees and budget managers	Daily
Requests for reports originate via e-mail, in person, at committee tables or through official request.	Incumbent scopes out request by clarifying current data required, historical data, calculations, intent of report and its eventual use, timelines, audience, etc. They then develop the necessary report to meet end user needs.	Capital committee CMWG committee External customers (e.g. capital project manager)	Monthly
Auditor would require various information for the main financial and small audits from the incumbent.	Incumbent would determine what the auditor is trying to achieve and how best to gather the related information to answer their question. It could involve an analysis of various information, query, spreadsheet or an explanation that justifies the reasonableness of the activity or balance in an account.	Auditor	Semi annually
Requests for data and reports are received via e-mail, in person or via telephone from Supervisor	Incumbent clarifies expectations of ad hoc reports/data, timelines and then develops a plan for completion ensuring timelines are met and accuracy is assured.	Finance/Planning and Analysis	Weekly

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

8. Communication

In the table below indicate the type of communication skills required to deal effectively with others. Be sure to list both verbal (e.g. exchanging information, formal presentations) and written (e.g. initiate memos, reports, proposals) in the section(s) that best describes the method of communication.

Communication Skill/Method	Example	Audience	Frequency (D, W, M, I)*
Exchanging routine information, extending common courtesy	Obtain information		I
Explanation and interpretation of information or ideas	Provide information, guidance to assist with budget issues	Budget Managers	D/W
	Audit reports (capital)	Auditors	I
	Review capital purchase orders	Purchasing	W
	Prepare salary projections and reconcile complement	Payroll	
	Exchange/request information	Finance Dept.	M D
	Acts as a resource	Information Tech.	W

Imparting technical information and advice	Educates new Budget Managers regarding budget information and systems as new staff move into these positions	Budget Managers	M
	Provide information, clarification, guidance and advice re problems/processes	Budget Managers, Operations Officers	W
	Systems/desktop functionality, financial interpretation of reports; accounting practices and resourcing	Finance Team	M
	Highly detailed and complex explanation of financial, budget, and ad hoc reporting.	Finance Team	M
	Recommends capital spending based on analysis and review of Ministry guidelines.	Capital Group	I
Instructing or training			
Obtaining cooperation or consent			
Negotiating			

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

9. Physical Effort

In the tables below, describe the type of physical activity that is required on a regular basis. Please indicate the activity as well as the frequency, the average duration of each activity and whether there is the ability to reduce any strain by changing positions or performing another activity. Activities to be considered are sitting, standing, walking, climbing, crouching, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period.

Physical Activity	Frequency (D, W, M, I)*	Duration			Ability to reduce strain		
		< 1 hr at a time	1 - 2 hrs at a time	> 2 hrs at a time	Yes	No	N/A
Sitting at desk/computer	D			X	X		

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

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

- Light (up to 5 kg or 11 lbs)
- 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
Working with long projects which are complex and can be interrupted	End of each semester for 2 weeks			x
Can concentration or focus be maintained throughout the duration of the activity? If not, why? X				

Activity #2	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Complex spreadsheet development, budget tree setups, budget data macro design, upload and analysis	Semi – annually (2weeks)			x
Can concentration or focus be maintained throughout the duration of the activity? If not, why? X <input type="checkbox"/> Usually constant interruptions by telephone, other employees in the department and other staff members No				

Activity #3	Frequency (D, W, M, I)*	Average Duration		
		Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Can concentration or focus be maintained throughout the duration of the activity? If not, why? <input type="checkbox"/> Usually <input type="checkbox"/> No				

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

11. Working Environment

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

Working Conditions	Examples	Frequency (D, W, M, I)*
<input checked="" type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below)	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		
<input checked="" type="checkbox"/> travel	To other campuses (e.g. Frost)	I
<input type="checkbox"/> working in isolated or crowded situations		
<input type="checkbox"/> other (explain)		

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