Position Description Form (PDF)

College: Sir Sandford Fleming

Incumbent's Name:

Position Title: Customer Service Advisor (Continuing Education & Contract Training)   Payband: E

Position Code/Number: S00498

Scheduled No. of Hours: 35 hours/week

Appointment Type: _____X_____12 months _____ _____less than 12 months

Supervisor's Name and Title: Manager, Client Services

Completed by: Manager, Client Services   PDF Date: October 16, 2024

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 Continuing Education and Contract Training (CECT) Customer Service Advisor is the first point of contact to provide front line customer service to CECT students (including online, Ontario Learn & face to face), as they relate to admission inquiries, processing registrations, fee set-up & collection, accessing courses, providing information on courses, programs and certificate selections, new opportunities and course changes as well as delivering support services that enhance the student experience.

In collaboration with the Continuing Education Managers, schedules courses and classes in Evolve as part of course set up to open registration. Completes grad audits, grade collection, and produces certificates. Provides feedback to management to assist with program development and quality delivery.

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*
Student Customer Service • Provides front-line customer service support to CECT students (including online, face-to-face, & Ontario Learn) and the college community with responsive phone, email and in-person service that reflects the department objectives to provide excellent and timely service. • Provides general program information and assists students making course selection and certificate decisions ensuring students meet admission requirements. • Supports students regarding financial assistance, accessing Fleming College's student supports, registrations (including OntarioLearn), changes or withdrawals, refunds, fee collections for courses and special circumstances, providing referrals to appropriate department staff members, when necessary. • Prepares and provides the necessary student orientation. • For sponsored students: Guide and advises students on course/certificate selection (as with all CE students). Provide course details to have sponsorship set up and invoice created and issued Once sponsorship letter is received from sponsor, Advisor contacts the student, obtains signature on promissory note, registers them into courses and explains process for future semesters if necessary.	65%

Register & track sponsored students. • Creates acceptance letter as needed and assists students throughout the application process. • Offers information and services in a timely manner to orient new students, support course completions and enhance the experience for CECT students. Ensures academic regulations and operational procedures of the Registrar's Office are followed and maintained accurately. • Works collaboratively with Continuing Education Managers to ensure effective communication with students. Maintains resources for distribution such as calendars, financial aid brochures, maps of the region, bus schedules.	
Administrative Support • Schedules courses and classes in Evolve as part of course set up to open registration, • Responsible to complete Grad Audits and produce Certificates of completion. Supports the entry of grades for in-class and online courses. • For Ontario Learn: Reconcile enrolment through web registration to ensure accuracy. Assists Ontario Learn students with course login and access information. Aids in the development and improvement of new and existing programming by providing Continuing Education Managers with information and feedback gathered through customer service and registration functions. Assists with the planning, organizing and delivery of promotional events and updating promotional materials. • Updates and maintains campus and digital channels of communication with current information. • Coordinates activities with bookstore as needed. • Facilitates appropriate student usage of facilities as needed. • For Ontario Learn: Oversees web registration, as needed, to ensure accuracy. Assists Ontario Learn students with course login and access information. • Ontario Learn invoicing (monthly OL Settlement, Embanet, membership, etc.) verifies accuracy, create Purchase Requisition and "Receive" in Evolve, including Academic & Career Entrance (ACE) courses invoicing. • Assists with examination planning and process as needed. • Monitors new external web training registrations and registers, as appropriate	30%
Other related duties as assigned	5%

*   To help you estimate approximate percentages:

½ hour a day is 7%	1 hour a day is 14%	1 hour a week is 3%
½ day a week is 10%	½ day a month is 2%	1 day a month is 4%
1 week a year is 2%		

1. **Education**

A. Check the box that best describes the **minimum** level of **formal** education that is required for the position and specify the field(s) of study. Do not include on-the-job training in this information.
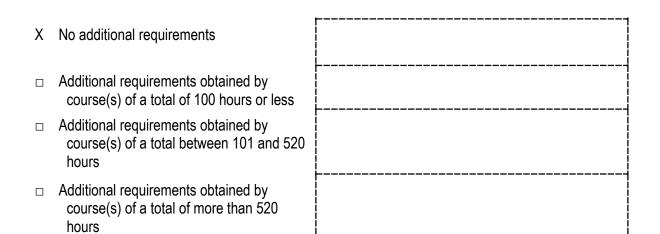
□ Up to High School	□ 1 year certificate	X 2 year diploma
□ Trade certification	□ 3 year diploma / degree	□ 4 year degree or 3 year diploma / degree plus professional certification

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

□ Doctoral degree

Field(s) of Study:

> Business or Office Administration

B. Check the box that best describes the requirement for specific course(s), certification, qualification, formal training or accreditation in addition to and not part of the education level noted above and in the space provided specify the additional requirement(s). Include only the requirement that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

X No additional requirements

□ Additional requirements obtained by course(s) of a total of 100 hours or less

□ Additional requirements obtained by course(s) of a total between 101 and 520 hours

□ Additional requirements obtained by course(s) of a total of more than 520 hours

2. Experience

Experience refers to the minimum time required in prior position(s) to understand how to apply the techniques, methods and practices necessary to perform this job. This experience may be less than experience possessed by the incumbent, as it refers only to the minimum level required on the first day of work.

Check the box that best captures the typical number of year of experience, in addition to the necessary education level, required to perform the responsibilities of the position and, in the space provided, describe the type of experience. Include any experience that is part of a certification process, but only if the work experience or on-the-job training occurs after the conclusion of the educational course or program.

□ Less than one (1) year

□ Minimum of one (1) year

□ Minimum of two (2) years

X Minimum of three (3) years	• Demonstrated experience providing excellent front-line customer service in a deadline driven, professional office environment. • Proven ability to communicate effectively with a variety of clients from varying social, academic, economic and cultural backgrounds. • Strong skills working with word processing, large business systems, data bases and spreadsheets (i.e. Word processing, spreadsheets, Email, etc.) • Experience and demonstrated proficiency in an on-line environment utilizing an Enterprise Resource Planning (ERP) system. Ability to navigate the external web and internal web-based information. • Experience co-coordinating several project components and using oral and written communication skills to liaise tactfully and diplomatically with multiple stakeholders both within the dept. and with other college depts. • General knowledge of post-secondary programs and CECT courses • Experience working independently, prioritizing, organizing and problem-solving within a customer service team-based environment. • Experience dealing with sensitive and confidential information in an appropriate manner and in keeping with College policies related to confidentiality and the Freedom of Information. • Demonstrated accuracy in documentation and verification skills as they relate to records management and various educational documents.
☐ Minimum of five (5) years	
☐ Minimum of eight (8) years	

3. Analysis and Problem Solving

This section relates to the application of analysis and judgement within the scope of the position.

The following charts help to define the level of complexity involved in the analysis or identification of situations, information or problems, the steps taken to develop options, solutions or other actions and the judgement required to do so.

Please provide up to three (3) examples of analysis and problem solving that are regular and recurring and, if present in the position, up to two (2) examples that occur occasionally:

	#1 regular & recurring
Key issue or problem encountered.	Potential student lacks sufficient information/knowledge to make course/certificate selection.
How is it identified?	Potential student asks incumbent for help and advice.

Is further investigation required to define the situation and/or problem? If so, describe.	Yes - Incumbent must ask probing questions to obtain information about career goals and skill / training gaps.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Determine what courses, programs or certificates could meet/address their needs. Requires incumbent to analyze the information they receive from the potential student, provide options for them and help develop a plan to obtain skills and credentials. Due to unique nature of CE, many inquiries are individualized and often potential student may not know the pathways to achieve their desired outcome or may need assistance identifying potential outcome options. Uses past practice but often new or different pathways are needed to meet individual or new needs/requests.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Course descriptions/outlines. Additional information provided by instructors. May have to refer to other resources in and outside the college (e.g. Second Career Advisor, Employment Ontario service provider).

3. **Analysis and Problem Solving**

#2 regular & recurring

Key issue or problem encountered	Course is cancelled and student is upset / disappointed. Objective is to find alternate options to provide solutions to meet the student's needs.
How is it identified?	When calling the student to communicate course cancelation.
Is further investigation required to define the situation and/or problem? If so, describe.	Yes - Must ask probing questions to identify the motivation/reason for the student enrolling in the course.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Find out if there is another course that could meet their needs (e.g. other course in the certificate, on-line alternative, next semester). Analysis includes exploring student's availability, ability and interest in on-line vs. in-class learning, short and long-term goals.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Requires thorough knowledge of the calendar, certificate requirements, pre-requisites, refund policy, skills required for on-line learning. Uses electronic, web-based and paper-based resources including documented guidelines and policies to acquire knowledge. Must consult regularly with colleagues inside and outside the department to acquire knowledge and keep current.

#3 regular & recurring

Key issue or problem encountered	Objective data required to support recommendations made to Admissions regarding determination of which Practical Nursing (PN) Bridging Program applicants are eligible for program entry. Additionally a systematic approach is required to rank qualified applicants when program is oversubscribed. (Applications exceed available spaces).
How is it identified?	Each time a new student applies for the Bridging Program, this analysis must be done
Is further investigation required to define the situation and/or problem? If so, describe.	Yes - In consultation with the School, the incumbent determines the criteria that will be used to conduct analysis and present recommendations to Admissions.
	Incumbent reviews documents included in student application package (i.e. transcript, certifications, etc) to determine if there is a match between student credentials and admissions criteria.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Analysis includes working through a number of logistical details to make recommendations which ensure fair distribution of access (students can present with a range of credentials and spaces/seats are allocated based on each credential getting a percentage of the open seats).
	The incumbent must determine which of three separate streams are most appropriate to match applicant to appropriate student pool. This is based on various criteria (i.e. school previously attended, year of studies, program, etc)
	Based on analysis, the incumbent provides data and recommendations to Admissions who in consultation with the incumbent, determines who will be offered admission.
What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).	Policy, past practice, Continuing Education Managers, Admissions Manager

3. ~~Analysis and Problem Solving~~

~~#1 occasional~~

~~Key issue or problem encountered~~	
~~How is it identified?~~	
~~Is further investigation required to define the situation and/or problem? If so, describe.~~	

~~Explain the analysis used to determine a solution(s) for the situation and/or problem.~~	
~~What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).~~	

<center>**~~#2 occasional~~**</center>

~~Key issue or problem encountered~~	
~~How is it identified?~~	
~~Is further investigation required to define the situation and/or problem? If so, describe.~~	
~~Explain the analysis used to determine a solution(s) for the situation and/or problem.~~	
~~What sources are available to assist the incumbent finding solution(s)? (eg. past practices, established standards or guidelines).~~	

4. Planning/Coordinating

Planning is a proactive activity as the incumbent must develop in advance a method of acting or proceeding, while coordinating can be more reactive in nature.

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:

<center>**#1 regular & recurring**</center>

List the project and the role of the incumbent in this activity.	Incumbent is required to coordinate daily task priorities to ensure that transaction processing is kept up to date. Ex. Web registration, email/phone inquiries, course withdrawals, fee assistance, set-up & collection, course changes, registration assistance

What are the organizational and/or project management skills needed to bring together and integrate this activity?	The incumbent must be cognizant of the deadlines established in the academic schedule so that critical deadline dates are met and tasks must be prioritized accordingly. This is a difficult task due to the front-line service nature of the job and regular customer interaction.
List the types of resources required to complete this task, project or activity.	Student information system, student records, CECT calendar, documented system procedures.
How is/are deadline(s) determined?	The CECT schedule sets out the dates by which the majority of transaction processing is to be completed.
Who determines if changes to the project or activity are required? And who determines whether these changes have an impact on others? Please provide concrete examples.	Incumbent's manager may require changes to the priorities set given current circumstances ie volume of processing, system needs, student impact. The team determines the impact. Delays in transaction processing can have a negative impact on students i.e delay in receiving tuition refunds, missed course drop dates, errors in level progression due to incomplete transfer credit processing.

4. ~~Planning/Coordinating~~

#2 regular & recurring

~~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.~~	

~~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.~~	

#3 regular & recurring

~~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.~~

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.

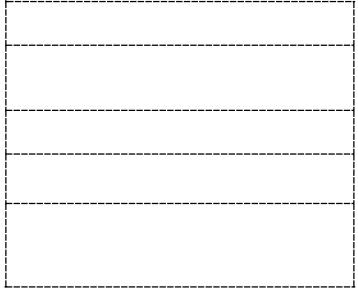| What are the organizational and/or project management skills needed to bring together and integrate this activity?	
List the types of resources required to complete this task, project or activity.	
How is/are deadline(s) determined?	
Who determines if changes to the project or activity are required? 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
X		Minimal requirement to guide/advise others. The incumbent may be required to explain procedures to other employees or students.	Advises students on course availability and which courses may best suit their goal, budget, schedule, learning style (on-line vs. in-class).
X	☐	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete specific tasks.	Explain new and changing procedures to the other CECT team members related to the courses and programming offered
☐	☐	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	

☐	☐	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	
☐	☐	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in 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)
Routine/regular practices do not require instruction and are expected to be completed without guidance.	Instructions are provided at the beginning of a new assignment that the incumbent is not familiar with.

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (if none, please strike out this section)
Budgetary guidelines, past practices and policies and procedures regarding project delivery. Ontario College Guide Academic Regulations and Schedule College Calendar and Website Admissions Policies and Procedures Past/Establish Practices Ministry Guidelines	

How is work reviewed or verified (eg. feedback from others, work processes, Supervisor)?	
Regular and Recurring	Occasional (if none, please strike out this section)

	Generally work is reviewed only periodically by manager. Occasional supervisory input or verification when requested.
	Complaints or unique situations are reviewed with the manager and/or Continuing Education Managers.

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)
Proper processing procedure to properly handle a student transaction ie. Withdrawal dates vs effective dating vs action dates.	Incumbent decides, in consultation with manager the processes for delivering customer service, registration and student support. Final decisions are then made by the manager.

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)
Consideration for approval of actions which fall outside the jurisdiction of established policy or guidelines Eg. Approval of an emergency loan, or bursary that falls outside the normal limits	Recommended changes to process, business process time lines, addition of tasks perceived to be outside of scope – task/workload priorities outside of scope
Irate and/or upset students, parents, faculty or public who will not accept policies and procedures.	Recommendations to changes in policy;
Situations which involve controversial issues where lawyer, parent or community agency are involved.	Staffing or budget issues.
Freedom of Information inquiries from police and private investigators.	

Describe the type of decisions that would be decided by the incumbent.	
Regular and Recurring	Occasional (if none, please strike out this section)

When providing options to students whether it be with respect to course selection, interpretation of college policy/guidelines, etc, incumbent is required to ensure that students/college staff/external community are directed appropriately. Incumbent is accountable for ensuring work is completed accurately and on time in accordance with policies and procedures of college and Ministry requirements. Creativity is required in identifying alternate solutions. Flexibility is given as long as the incumbent remains within the bounds of established standards. agreements, and policies i.e. waiving deadline dates, refund policies etc..	The incumbent may modify past practices to handle new or unfamiliar situations or in order to make customer-sensitive and appropriate decisions relevant to situations or problems. The incumbent collects all relevant data to seek the guidance of the manager or recommend and change/new practice/process.

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?		
Front-line contact for all CECT students. Provide service by asking questions to thoroughly understand the customers' needs. May make recommendations to manager and/or Continuing Education Manager) to design services to meet current and future needs of customers.	Verbally or via email with the aid of course calendars and other support material or referral to other staff.	CECT students (usually part-time students, adult learners) Post-secondary students Fleming staff	D

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

8. Communication

Communication Skill/Method	Example	Audience	Frequency (D, W, M ,I)*
Exchanging routine information, extending common courtesy	Shares information about course offerings, registration processes, course cancellations/changes verbally (in person, phone) and in writing (email). Information comes from calendar, course outlines, and instructors' notes.	Students, RO staff, faculty & other Fleming staff	D
Explanation and interpretation of information or ideas	Provides guidance with respect to CECT courses. Rather than just reading descriptions, incumbent provides additional information, insight. Anticipates frequently asked / common questions and the need for more information and provides it without being directly asked. Handles complaints.	CECT Students	D
Imparting technical information and advice			
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/keyboarding,	D			X	X		
walking,	D	X			X		
standing,	D	X			X		
bending.	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)

Supplies and files

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	Average Duration

	(D, W, M, I)*	Short < 30 mins	Long up to 2 hrs	Extended > 2 hrs
Course registration & assessing documentation from students involves verifying authenticity and flagging irregularities for admissions staff and rContinuing Education Managers	W	X		

Can concentration or focus be maintained throughout the duration of the activity? If not, why?
☐   Usually
X   No–the incumbent does require a greater than normal level of concentration to complete these tasks and there is pressure to do so quickly and efficiently while providing front-line service to walk-in students, faculty, etc.

Activity #2	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?
☐ Usually
☐ 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?
☐ Usually
☐ No

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

11. Working Environment

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

Working Conditions	Examples	Frequency (D, W, M, I)*
X acceptable working conditions (minimal exposure to the conditions listed below)	Office environment	D
☐ accessing crawl spaces/confined spaces		

X dealing with abusive people	The incumbent experiences frustrated students who may use derogatory or threatening speech.	I
□ dealing with abusive people who pose a threat of physical harm		
□ difficult weather conditions		
□ exposure to extreme weather conditions		
□ exposure to very high or low temperatures (e.g. freezers)		
□ handling hazardous substances		
□ smelly, dirty or noisy environment		
X travel	Very occasionally e.g. open house, unscheduled coverage	I (1-2x per semester)
□ working in isolated or crowded situations		
□ other (explain)		

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