



**CAAT Job Evaluation System for Non-Bargaining Unit Employees
Ontario Colleges of Applied Arts and Technology**

The Job Fact Sheet Questionnaire (JFS) is used to gather information for job evaluation purposes for the Colleges' Administrative Staff positions. Please read each section carefully before completing.

The Education and Experience sections are to be completed by the College according to the College's recruitment standards.

Upon completion by an incumbent, the JFS is reviewed and, when necessary, adjusted by the position's Manager and the Senior Manager responsible for the position. Any changes to the JFS are to be reviewed with the incumbent prior to evaluation.

The JFS is then submitted to the appropriate College official for job evaluation purposes. The JFS is not finalized until it has gone through the job evaluation process and the results have been confirmed by the College. A copy of the finalized JFS will be provided to the incumbent for information purposes and as a job description.

POSITION IDENTIFICATION

Position Title: Manager, Student Financial Services
Position Number: A00202
Pay Band: 10
Incumbent:
Location/Campus: Peterborough 80%, Lindsay 20%
Division/Department: Office of the Registrar
Immediate Supervisor (title): Associate Registrar
Date of JFS: July 24, 2023
Last Evaluated: May 26, 2023

Type of Position: (please place an "X" in the appropriate square)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Administration | <input type="checkbox"/> Part-Time/Contract Administration |
| <input type="checkbox"/> Sessional Academic | <input type="checkbox"/> Part-Time Academic |
| <input type="checkbox"/> Part-Time Support | <input type="checkbox"/> Other |

I have read and understood the contents of the Job Fact Sheet (if completed by an incumbent):

Incumbent: _____

Date: _____

Recommended by:

Position's Manager: _____

Date: _____

Approved by:

Senior Manager: _____

Date: _____

POSITION SUMMARY

Provide a concise description of the position by identifying its most significant responsibilities and/or accountabilities.

Reporting to the Associate Registrar, Records, Student Accounts & Financial Aid, the Manager is responsible for managing the efficient planning, development and delivery of a broad range of financial assistance, student employment funding and services that support student recruitment, retention and success by ensuring resources are available and appropriately administered to students to reduce financial barriers to attaining educational goals and comply with government policy / directives.

KEY DUTIES

Provide a description of the position’s key duties. Estimate the percentage of time spent on each duty (to the nearest 5%). Add an extra page if necessary.

		% of Time
	<p>Student Financials Programs and Services:</p> <ul style="list-style-type: none"> • Ensures consistent application of college policies relating to fees. Evaluates and oversees improvements to ensure efficient student payments including the coordinator and distribution of technical and informational content necessary to support all student financial activities; communication to students on student financial functions/services; assessment, collection and deposit of tuition and related fees. • Manages the planning, development, delivery of all financial assistance programs and services across all campus locations (i.e. OSAP, Work Study, Tuition Set Aside (TSA), Bursaries, Entrance Awards, Emergency Funding etc.) and special bursary programs (i.e. Disability, First Gen, Aboriginal and Student Access Guarantee). • Monitors the effectiveness of programs and services to ensure they meet the needs of students and comply with all MCU / government policies and directives. Where appropriate, provides input and recommendations to Ministry and college policy or procedural changes. • Acts as the main point of contact and liaison with MCU which includes but is not limited to student financial aid appeals, audit, OSAP directives, request for information and inquiries. • Evaluates financial assistance needs, develops and submits budget proposals to MTCU for funding for the administration of government programs (i.e. Work Study, Special Bursary, Child Care Bursary, Disability etc.) • Provides consistent and fair oversight of financial assistance appeals and exceptions for both government programs as well as funding through College bursaries. Investigates, reviews major, complex appeals on a case by case basis, approving or rejecting appeals within assigned authority and determines appeals to be forwarded to the Ministry. • Provides guidance in cases involving students with unique and/or complex financial and/or family situations regarding financial needs. • Oversees all student financial communications to relevant stakeholders regarding financial assistance policies, procedures and services. • Periodically conducts internal process / service audits and student file reviews to ensure compliance. • Ensures staff have the appropriate training and system access in accordance with government protocols. 	<p>45%</p>

	<ul style="list-style-type: none"> Ensures the appropriate coordination, alignment and integration of information, service and resources with other service areas and campuses. 	
2	Student Financials Projects and System: <ul style="list-style-type: none"> Oversees management, development and maintenance of internal financial systems, student information systems, processes and procedures, including integration with MCU OSAP systems. Oversees management, development and maintenance of internal systems, processes and procedures to ensure integration with other key system areas including finance and advancement. Acts as the lead for portfolio related system projects and enhancements. Monitors the effectiveness of systems and where needed, manages and/or participates as subject matter expert on project teams to support the development and enhancement of systems and processes to seamlessly flow over \$50 million annually to students. Oversees OSAP and student financials modernization initiatives to ensure compliance to provincial directives and service standards. 	15%
3	Reporting and Audit: <ul style="list-style-type: none"> Serves as the primary point of contact in the Office of the Registrar for annual financial audit processes and required ministry reporting. Responsible for overseeing OSAP, TSA, Bursary and other government program audit processes and required ministry reporting. 	15%
4	Student Financial Services Human / Fiscal Administration <ul style="list-style-type: none"> Works to foster and develop a strong team environment with high levels of employee engagement. Responsible for all aspects of staffing which includes determining and allocating work priorities/assignments, monitoring staffing levels, recruitment, selection, performance management and evaluation, discipline, etc. Participates in the development/recommendation of operational budgets which includes but is not limited to monitoring and maintaining budget activity to ensure appropriate and optimal use of human/fiscal/physical resources and budget control within assigned area. Ensures all functional activities align with and adhere to College policies, procedures, applicable government legislation and collective agreements. Responsible for Health and Safety compliance in for work areas in collaboration with the College Safety Officer to ensure relevant policy and procedures are developed and kept current; and that staff (including student workers) are trained according to the corporate Health and Safety policy, Ontario Legislative framework, and the OPSEU Collective Agreements. 	20%
5	Other: <ul style="list-style-type: none"> Performs other duties as assigned. 	5%
	TOTAL	100%

1. COMPLEXITY - JUDGEMENT (DECISION MAKING)

Complexity refers to the **variety** and relative **difficulty** of **comprehending** and **critically analyzing** the material, information, situations and/or processes upon which decisions are based.

Judgement refers to the **process** of identifying and reviewing the available options involved in decision making and then choosing the most appropriate option. Judgement involves the application of the knowledge and experience expected of an individual performing the position.

Provide up to **three examples** of the most important and difficult decisions that an incumbent is typically required to make.

1. Determines the appropriate allocation and disbursement of financial assistance ensuring fairness, integrity and consistency in all processes and subsequent appeals. Any errors are subject to audit and negative financial consequences for the College.
2. The incumbent is responsible for taking the lead in responding to new or changing Ministry / Legislative requirements, including compliance. The incumbent is responsible for the analysis of new or changing policies and determining the impact on existing processes, services or system enhancements required to implement and operationalize.
3. The incumbent is responsible for taking the lead in responding to new or changing fee payment and refund, initiatives and requirements as they pertain to Financial Aid including projects that will increase service to students.

2. EDUCATION (to be completed by the College)

Education refers to the **minimum level** of formal education and/or the type of training or its equivalent that is required of an incumbent at the **point of hire** for the position. This may or may not match an incumbent's actual education or training.

Non-Post Secondary

Partial Secondary School

Secondary School Completion

Post Secondary

1-Year Certificate

4-Year Degree

2-Year Diploma

Masters Degree

3-Year Diploma/Degree

Post Graduate Degree

Professional Designation

Specify:

Other

Specify:

The College is to identify the minimum level of education and/or type of training or its equivalent that is required for the position based upon the College's recruitment standards.

Specify and describe any program speciality, certification or professional designation necessary to fulfil the requirements of the position.

Accounting, Business Administration, Financial Management, Banking, Public Administration or related field of study; CPA designation preferred

Specify and describe any special skills or type of training necessary to fulfil the requirements of the position (e.g., computer software, client service skills, conflict resolution, and operating equipment).

- Innovates and inspires creativity, leads change, creates a culture of accountability and performance, builds and sustains critical relationships internally and externally.
- Deep appreciation for and understanding of diversity and inclusion.
- Highly motivated and able to function in high volume, stressful environments.
- Exceptional interpersonal and customer service skills including responsiveness and the ability to work effectively with customers and staff in complex and volatile situations.
- Strong understanding of information technology, business information intelligence tools and web-based services.
- Strong analytical, organizational and critical decision-making skills.
- Strong knowledge of financial practices and procedures within a highly regulated environment.
- Demonstrated planning, project management, organization and time management skills
- Sound judgment, problem solving and conflict resolution skills.
- Excellent verbal and written communication to communicate and interact with a diverse client base.
- Strong persuasion, influencing and collaboration skills.

3. EXPERIENCE (to be completed by the College)

Experience refers to the amount of **related, progressive** work experience required to obtain the essential techniques, skills and abilities necessary to fulfil the requirements of the job at the **point of hire** into the position. This may or may not match the incumbent's actual amount of experience.

The College is to identify the minimum amount and type of experience appropriate for the position based upon the College's recruitment requirements.

Experience required at the point of hire. Up to and including:

(Please place an "X" in the appropriate box)

- | | |
|--|---|
| <input type="checkbox"/> 0 - no experience | <input type="checkbox"/> 3 years |
| <input type="checkbox"/> 1 month | <input checked="" type="checkbox"/> 5 years |
| <input type="checkbox"/> 3 months | <input type="checkbox"/> 7 years |
| <input type="checkbox"/> 6 months | <input type="checkbox"/> 9 years |
| <input type="checkbox"/> 1 year | <input type="checkbox"/> 12 years |
| <input type="checkbox"/> 18 months | <input type="checkbox"/> 15 years |
| <input type="checkbox"/> 2 years | <input type="checkbox"/> 17 years |

Specify and describe any specialized type of work experience necessary to fulfil the requirements of the position.

- 5 years of leadership experience managing the planning and delivery of related government financials and/or student financials programs / service including assessing client need, providing counsel, applying, interpreting and adhering to government policy / directives, Ministry related reporting and audit processes. Preference will be given to candidates with experience in a similar role (i.e. post-secondary education environment, financial aid program/service management with multiple location service delivery)
- Strong management experience, conflict resolution skills and demonstrated ability to manage in a multi-union environment.
- Requires the ability to comprehend and analyze complex issues and situations, and to make timely and effective decisions, including financial analysis and budgetary experience.
- Project management experience at a leadership level involving coordination
- Ability to analyse trends and patterns in changing business/client needs and demands; develop / adapt creative solutions to address unique / challenging / complex situations
- Experience in monitoring, developing, evaluating and improving business processes and procedures
- Sound decision making, planning, analytical and organizational skills
- Excellent interpersonal, communication and conflict resolution skills
- Ability to maintain confidentiality, diplomacy and ability to counsel students in complex, stressful situations
- Systems orientation (Student Information system (an asset))
- Knowledge of FIPPA as it relates to providing information / service delivery through multiple channels
- Works well under pressure; adaptable, flexible and responsive to fast paced, changing environment

4. INITIATIVE - INDEPENDENCE OF ACTION

Initiative - Independence of action refers to the **amount of responsibility** inherent in a position and the **degree of freedom** that an incumbent has to **initiate** or **take action** to complete the requirements of the position. An incumbent is required to foresee activities and decisions to be made, then take the appropriate action(s) to ensure successful outcomes. This factor recognizes the established levels of authority which may restrict the incumbent's ability to initiate or take action,

e.g., obtaining direction or approval from a supervisor, reliance on established procedures/methods of operation or professional practices/standards, and/or built-in-controls dictated by computer/management systems.

Briefly describe up to three typical job duties/types of decisions that the incumbent is required to perform using their initiative without first having to obtain direction or approval from a supervisor.

1. Decisions regarding financial assistance appeals and/or exceptions to policy for both government assistance as well as funding through College bursaries within assigned authority.
2. Develops strategies to effectively communicate / promote all internal and external financial awards to students and the broader college.
3. As part of the RO leadership team, responsible for developing short term and long term human resource plans in areas of responsibility that are key to successfully supporting delivery of financial assistance to students and meeting strategic and operational priorities.

Briefly describe up to three typical job duties/types of decisions that the incumbent is required to perform which require the direction or approval from a supervisor.

1. Significant changes to established policy, procedures and services that impact the delivery of student financial services.
2. Major budgetary decisions that have not been pre-determined (i.e. investment in new and/or enhanced system modules / features) outside authority level.
3. Serious staff disciplinary issues/action, which may lead to termination or potential litigation.

Give specific examples of guidelines, procedures, manuals (formal or informal), computer systems/programs that are used in performing job duties and in making decisions, e.g., Government regulations, professional or trade standards, College policies or procedures, department or program procedures, computerized/manual programs/systems and any other defined methods or procedures.

- College / Department Policies and Procedures
- Fleming College Strategic Mandate, Operational Plans, Enrolment Plan
- Government Policies, Guidelines, Directives (i.e. MTCU, Revenue Canada)
- System Manuals
- Support Staff Collective Agreement
- Protection of Privacy and Freedom of Information Act
- Human Rights, AODA Standards, Health & Safety
- Professional Associations / Publications

5. POTENTIAL IMPACT OF DECISIONS

Potential Impact of Decisions recognizes the **potential consequences** that **errors in judgement** made by an incumbent, despite due care, could have on the College. Usually, the higher the level of accountability inherent in a position, the greater the potential consequences there are on the College from errors in judgement.

Give up to three examples of the typical types of errors in judgement that an incumbent could make in performing the requirements of the position. Do not describe errors which could occur as a result of poor performance, or ones that are rare or extreme. Indicate the probable effects of those errors on the College, e.g., loss of reputation of program/College, waste of resources, financial losses, injury, property damage, affects on staff, students, clients or public.

1. Failure to properly train and oversee staff to provide prompt, accurate processing of OSAP applications/appeals, incorrectly interpreting and applying OSAP policies and/or any noncompliance could negatively impact the College's ability to offer OSAP funds to students which would have a major impact on enrolment given the significant number of students who rely on OSAP financial assistance.

Failure to properly train and oversee staff to provide prompt, accurate processing of tuition payments, incorrectly interpreting and applying Ministry tuition fee policies and/or any noncompliance could negatively impact the College's reputation and relationship with MCU.

2. Failure to ensure Financial Aid staff can properly assess unmet financial needs of student could result in student's withdrawal from College, loss of funding for the College, and damage to the College's reputation.

6. CONTACTS AND WORKING RELATIONSHIPS

Contacts and Working Relationships refers to the **types, importance and intended outcomes** of the contacts and working relationships required by an incumbent to perform the responsibilities of a position. It also measures the skill level required to be effective in dealing with contacts and being involved in working relationships. This factor does **not** focus on the level of the contact, but on the **nature** of the contact.

Indicate by job title, with whom an incumbent is required to interact to perform the duties and responsibilities of the positions. Describe the nature, purpose and frequency of the interaction, e.g., exchanging information, teaching, conflict resolution, team consultation, counselling.

Internal Contacts	Contacts by Job Title	Nature and Purpose of Contact	Frequency of Contact	
			Occasional	Frequent
Internal to the College, e.g., students, staff, management, colleagues.	Registrar & Associate Registrars	Direction, consultation, input / clarification, policy interpretation, information exchange, approval for significant changes to policy / procedures / budget		X
	R.O Managers	Update, inform, consultation, service / process integration and enhancement, escalated student issue		X
	Academic Area	Consultation on criteria for new awards, liaison for award winners		X
	Advancement	Information exchange, collaboration on new / changing policies and processes for financial awards, documentation for reporting purposes		X

	IT	Consultation and participation in projects, technical support, queries, system upgrades, changes, implementations, troubleshooting		X
	HR	Staff and payroll inquiries, issues, consultation, collective agreement interpretation	X	
	Staff (Direct Reports)	Functional and technical leadership, guidance and direction, setting expectations, monitoring performance, providing information, support, training on processes, systems and procedures, manage and resolve conflicts, respond to unique, complex and/or escalated student issues		X
	Staff (Other)	Consultation, update and inform	X	
External Contacts		Nature and Purpose of Contact	Frequency of Contact	
			Occasional	Frequent
External to the College, e.g., business and industry representatives, advisory committee at other Colleges, government officials and the general public	Current and/or Prospective Students / Parents	Provide information, guidance, application or interpretation of policy / procedures, resolve unique, complex and/or escalated issues/inquiries.		X
	MCU	Reporting, funding, exchange and clarification of information, policies and procedures, student information, issues, consultation, compliance.	X	
	National Student Loan Centre	Student financial issues, information exchange, OSAP loan distribution information		X
	System/Technology Vendors	Information, Consultation	X	
	Other Colleges	Information exchange, committee participation for joint projects/initiatives, policy interpretations	X	
	General Public	General Inquiries		X

Occasional (O)
Frequent (F)

Contacts are made once in a while over a period of time.
Contacts are made repeatedly and often over a period of time.

7a. CHARACTER OF SUPERVISION/FUNCTIONAL GUIDANCE

Character of Supervision identifies the **degree and type** of supervisory responsibility in a position or the nature of functional/program supervision, technical direction or advice involved in staff relationships.

Place an "X" in the applicable box(es) to describe the type of supervisory responsibility required by an incumbent in this position.

- Not responsible for supervising or providing guidance to anyone.
- Provides technical and/or functional guidance to staff and/or students.
- Instructs students and supervises various learning environments.
- Assigns and checks work of others doing similar work.
- Supervises a work group. Assigns work to be done, methods to be used, and is responsible for the work performed by the group.
- Manages the staff and operations of a program area/department.*
- Manages the staff and operations of a division/major department.*
- Manages the staff and operations of several divisions/major departments.*
- Acts as a consultant to College management.
- Other e.g., counselling, coaching. Please specify: Coaching staff in times of conflict resolution providing advice to students in complex financial aid cases.

* Includes management responsibilities for hiring, assignment of duties and work to be performed , performance management, and recommending the termination of staff.

Specify staff (by title) or groups who are supervised/given functional guidance by an incumbent.

- Financial Aid Officers (3)
- Financial Aid Assistant (1)
- Student Accounts Specialists (4)

7b. SPAN OF CONTROL

Span of Control is complementary to **Character of Supervision/Functional Guidance**. Span of Control refers to the **total number of staff** for which the position has supervisory responsibility, (i.e., subordinates, plus all staff reporting to these subordinates).

Enter the total number of full time and full time equivalent staff reporting through to the position. Also identify the number of staff for whom the position has indirect responsibility (contract for service), if applicable.

Type of Staff	Number of Staff
Full-Time Staff	8
Non Full Time Staff (FTE) *	-
Contract for Service **	
Total:	8

*** Full Time Equivalency (FTE) conversions for non full time staff are as follows:**

Academic Staff

Identify the total average annual teaching hours taught by all non full time teachers (parttime, partial load and sessional) for which the position is accountable and divide by 648 hours for post secondary teachers and 760 hours for non-post secondary teachers.

Support Staff

Identify the total average annual hours worked by part-time support staff for which the position is accountable and divide by 1820 hours.

Administrative Staff

Identify the total average annual hours worked by non full time administrative staff for which the position is accountable and divide by 1820 hours.

** Contract for Services

When considering contracts for services, review the nature of the contractual arrangements to determine the degree of supervisory responsibility the position has for contract employees. This could range from no credit for supervising staff@ when the contracting company takes full responsibility for all staffing issues to prorated credit for supervising staff@ when the position is required to handle the initial step(s) when contract staffing issues arise.

8. PHYSICAL AND SENSORY DEMANDS

Physical/Sensory Demands considers the **degree** and **severity** of exertion associated with the position. The factor considers the intensity and severity of the physical effort rather than the strength or energy needed to perform the task. It also considers the sensory attention required by the job as well as the frequency of that effort and the length of time spent on tasks that cause sensory fatigue.

Identify the types of physical and/or sensory demands that are required by an incumbent. Indicate the frequency of the physical demands as well as the frequency and duration of the sensory demands. Use the frequency and duration definitions following the tables to assist with the descriptions.

PHYSICAL DEMANDS

Describe the types of activities and provide examples that demonstrate the physical effort that is required in the position on a regular basis, i.e., sitting, standing, walking, climbing, lifting and/or carrying light, medium or heavy objects, pushing, pulling, working in an awkward position or maintaining one position for a long period of time.

Types of Activities that Demonstrate Physical Effort Required	Frequency (note definitions below)				
	Occasional	Moderate	Considerable	Extended	Continuous
Sitting			X		
Types of Activities that Demonstrate Physical Effort Required	Frequency (note definitions below)				
	Occasional	Moderate	Considerable	Extended	Continuous
Standing		X			
Walking		X			
Lifting / carrying objects	X				

SENSORY DEMANDS

Describe the types of activities and provide examples that demonstrate the sensory effort that is required in the position on a concentrated basis, i.e., reading information/data without interruption, inputting data, report writing, operating a computer or calculator, fine electrical or mechanical work, taking minutes of meetings, counselling, tasting, smelling etc.

Types of Activities that Demonstrate Sensory Effort Required	Frequency (note definitions below)					Duration
	Occasional	Moderate	Considerable	Extended	Continuous	Short Intermediate or Long

Assisting / guiding staff and/or students					x	I
Reviewing / analysing information and data					x	I
Writing reports / proposals / communications / procedures				x		I
Computer operations / systems				X		S
Project planning, consultation and implementation			X			I
Handling / resolving unique, complex and/or escalated student inquiries, issues, complaints		X				I

FREQUENCY:

Occasional:	Occurs once in a while, sporadically.
Moderate:	Occurs on a regular, ongoing basis for up to a quarter of the work period.
Considerable:	Occurs on a regular, ongoing basis for up to a half of the work period.
Extended:	Occurs on a regular, ongoing basis for up to three-quarters of the work period.
Occasional:	Occurs once in a while, sporadically.
Continuous:	Occurs on a regular, ongoing basis throughout the entire work period except for regulated breaks.

DURATION:

Short:	Up to one hour at a time without the opportunity to change to another task or take a break.
Intermediate:	More than one hour and up to two hours at a time without the opportunity to change to another task or take a break.
Long:	More than two hours at a time without the opportunity to change to another task or take a break.

9. WORKING CONDITIONS

Working Conditions considers the frequency and type of exposure to undesirable, disagreeable environmental conditions or hazards, under which the work is performed.

Describe any unpleasant environmental conditions and work hazards that the incumbent is exposed to during the performance of the job.

Environment

Describe the types of activities and provide examples that demonstrate exposure to unpleasant environmental conditions in the day-to-day activities that are required in the job on a regular basis, e.g., exposure to dirt, chemical substances, grease, extreme temperatures, odours, noise, travel, verbal abuse, body fluid, etc. Indicate the activity as well as the frequency of exposure to undesirable working conditions.

Types of Activities That Involve Job Related Unpleasant Environmental Conditions	Frequency (note definitions below)		
	Occasional	Frequent	Continuous
Normal indoor working conditions			X
High volume, high stress (particularly at start of semester)			x
Handling intense, distraught, angry students (or their parents) (i.e. ineligibility, denied financial assistance etc.)		x	
Requirement for <i>Evening and weekend work</i> -- open house, start up, and system upgrades etc.	X		
Often exposed to sensitive, personal information in which the incumbent needs to respond professionally and appropriately)			X
Travel (approximately once per week intercampus)	X		

Hazards

Describe the types of activities and provide examples that demonstrate the hazards in the day-to-day activities that are required in the job on a regular basis, e.g. chemical substance, electrical shocks, acids, noise, exposure to infectious disease, violence, body fluids, etc. Indicate the activity as well as the frequency of exposure to hazards.

Types of Activities That Involve Job Related Hazards	Frequency (note definitions below)		
	Occasional	Frequent	Continuous

Frequency:

Occasional	Occurs once in a while, sporadically.
Frequent	Occurs regularly throughout the work period.
Continuous	Occurs regularly, on an ongoing basis, throughout most of the work period.

Additional Notes Pertaining to this Position: