

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, Part-Time Support Staff, Part-Time and Sessional Academic 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 the incumbent for information purposes and as a job description.

POSITION IDENTIFICATION

DATE: 16-Jul-2024

College: St. Lawrence College
Incumbent: Vacant
Position Title: Manager, Budgets & Financial Planning
Payband: Payband 11
Division/Department: Financial Services
Location/Campus: Kingston
Immediate Supervisor (title): Director of Finance

Type of Position:

Administrative
 Sessional Academic
 Part-Time Support
 Part-Time Administrative
 Part-Time Academic
 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 Director, Budgets and Planning, the Manager, Budgets & Financial Planning manages operational activities of the Budgets & Planning team. This position is responsible for ensuring the implementation of standardized and sound financial management practices and ensuring accountability and effective management of the College's financial resources.

The Manager, Budgets & Financial Planning is responsible for developing, implementing and maintaining the College's budgeting and forecasting processes, in collaboration with the Associate Director, Budgets and Planning. The Manager is also responsible for financial analysis and reporting that provides Management with accurate and relevant information for decision making and meets internal and external reporting requirements.

In addition, the incumbent has ownership of the budgeting software and management reporting including the analysis and recommendation of new systems/reports and upgrades. The incumbent provides support, guidance, training and solutions for reporting and budgeting systems.

The Manager, Budgets & Financial Planning will foster a productive and efficient work environment through mentorship and teamwork and take a lead role in developing and implementing innovative and practical approaches to departmental and corporate initiatives.

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.

| <u>KEY DUTIES</u> | <u>% OF TIME</u> |
|---|------------------|
| 1. FINANCIAL PLANNING AND FORECASTING: | (40%) |
| <ul style="list-style-type: none">• Systematically develop and manage processes related to the development of the annual budget and interim forecasts.• Act as a resource and advisor to managers and College staff in the process of budget and forecast preparation, analysis and interpretation of financial results.• Review the budget and forecasts for accuracy and reasonability.• Conduct research and analysis to support financial resource allocation decisions.• Prepare budget and forecast documents.• Assist in the preparation of the College's multi-year forecast. | |
| 2. FINANCIAL PERFORMANCE AND RISK ANALYSIS AND REPORTING: | (30%) |
| <ul style="list-style-type: none">• Research, recommend and implement processes and best practices to assess and assist in managing the College's financial performance.• Manage and complete variance analysis.• Identify and recommend strategies to deal with anomalies and variances; monitor operating and capital expenditures and initiate or recommend corrective actions.• Develop and manage financial models, analysis and reports to support Management decisions.• Identify and communicate risks and opportunities in the budget and forecasts.• Coordinate and file reports in accordance with Ministry Binding Policy Directives and other external requirements.• Interpret Ministry policies and other external requirements to ensure compliance and sound financial management. | |

3. FINANCIAL SYSTEMS (20%)

- Manage and serve as the System Administrator and Subject Matter Expert for the budgeting software, including the analysis and recommendation of new systems and upgrades.
- Contribute to the overall management of the core finance system and play a leadership role in system improvements, implementation and change management.
- Lead training and documentation of business processes, and recommend improvements in processes and systems.

4. ADMINISTRATION (10%)

- Provide leadership and supervision of staff by determining work priorities.
- Maintains a high level of performance through effective recruiting, selecting, developing, motivating, evaluating and training of staff.
- Participate in various committees as assigned.
- Develop and foster positive relationships across the College that facilitates decision support.
- Perform related duties and responsibilities as required in support of requests for information, analysis and special projects.

TOTAL:

100%

1. COMPLEXITY - JUDGEMENT (DECISION MAKING)

Complexity refers to the **variety** and relative **difficulty** of **comprehending** and **critically analysing** 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.

- a) Systematic development, implementation and completion of the budget and forecast processes and timelines, understanding the sequence of events required to ensure a logical and efficient process.
- b) Identify risks and opportunities, anomalies and errors in departments' budgets and provide managers with appropriate suggestions and advice.
- c) Training the broader St. Lawrence College community on best financial practices and processes related to budgeting, forecasting and financial analysis.

The incumbent will determine, through input from users and management, areas for training for managers and staff, and develop a program, which will improve their understanding of the processes, their roles and skills set required to undertake financial management.

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.

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.

| | |
|---|--|
| Non-Post Secondary | |
| <input type="checkbox"/> Partial Secondary School | <input type="checkbox"/> Secondary School Completion |
| Post Secondary | |
| <input type="checkbox"/> 1-Year Certificate | <input checked="" type="checkbox"/> 4-Year Degree |
| <input type="checkbox"/> 2-Year Diploma | <input type="checkbox"/> Masters Degree |
| <input type="checkbox"/> 3-Year Diploma/Degree | <input type="checkbox"/> Post Graduate Degree |
| <input type="checkbox"/> Professional Designation | Specify: |
| <input type="checkbox"/> Other | Specify: |

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

- Degree in Business/Commerce or another field relevant to the duties of the position.

B) 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, operating equipment).

- Advanced knowledge and competence in the use of integrated financial systems.
- Expert in Microsoft Excel.
- Exceptional analytical skills.
- Advanced knowledge and understanding of financial planning, forecasting and analytics techniques.
- Familiarity with Public Sector Accounting Standards.
- Ability to problem solve and resolve issues independently, with limited supervision by senior management.
- Excellent interpersonal and communication skills.
 - Ability to explain accounting procedures to non-financial personnel across the diverse College community.
 - Experience presenting complex financial, statistical and other information in a clear and understandable manner.
 - Ability to work successfully with diverse and sometimes conflicting interests and philosophies.
 - Ability to deal confidently with senior managers, staff members, Ministry representatives, etc.
- Highly client service oriented.

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:

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

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

- Experience developing multi-divisional budgets using advanced financial systems.
- Experience developing financial models, analysis and reporting that effectively supports decision making.
- Experience working effectively cross functionally with people at all organizational levels.

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.

A) 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.

- a) Prepare financial reports for internal and external use, including the College's Management and the Ministry, interpreting reporting requirements.

- b) Advise managers and College staff on the process of budget preparation, analysis and interpretation of financial results. Identify budget risk areas and discuss with managers.
- c) Interpret financial planning and forecasting parameters as dictated by the Ministry's Binding Policy Directives, Operating Procedures, College Funding Formula allocations and funding agreements among other documents. Seek clarification from the Ministry and other parties as necessary.

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

- a) Redesign of budget and forecast statements to be presented to the Board.
- b) Implement budget and forecast process improvements, along with related finance system changes and internal controls.
- c) Determine high impact assumptions for use in the developing budgets and forecasts.

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, effects on staff, students, clients or public.

- a) Misinterpretation of data, trends, etc. could lead to misrepresentation of information presented to Senior Management and/or Board, affecting the quality of decisions made and have a long-term financial or reputational impact.
- b) Errors or omissions in forecasting or modelling could lead to inappropriate resource allocation or other key decisions, unfavourable financial variances, and/or misleading or incorrect/incomplete reports and presentations to Board, Ministry, etc. This could severely impair the College's financial sustainability, reputation, and the quality of programming in the long-term.
- c) Incorrect or erroneous interpretation or application of the Ministry's calculation methodologies, policy and procedures (which are changed or updated on a regular basis) or Funding Formulas could result in grant penalties, and erosion of the College's relationship with Ministry and the Board.

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.

| Contacts | Contacts by Job Title | Nature and Purpose of Contact | Frequency of Contact | |
|---|--|---|----------------------|----------|
| | | | Occasional | Frequent |
| Internal to the College: | | | Occasional | Frequent |
| Internal to the College, e.g. students, staff, senior management, colleagues. | Financial Services | Advise on setup of finance system. Share budget information as required and assist with system errors and variance analysis. | | X |
| | College Management | Provide analysis such as Program Costing to support Management decisions. | | X |
| | College Budget Managers | Advice and support for budgeting; financial analysis, support and training on budgeting and reporting applications, liaison re: results, etc. | | X |
| | Registrar | Obtain targeted and forecasted enrolment and tuition rate information from Registrar. | X | |
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| External to the College: | | | Occasional | Frequent |
| External to the College, e.g. suppliers, advisory committees, staff at other colleges, government, public/private sector. | Various Ministries | Submission of reports, interpretation of policy; response to queries and requests for information | X | |
| | | | | |
| | | | | |
| | | | | |
| Occasional (O) | Contacts are made once in a while over a period of time. | | | |
| Frequent (F) | 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.

(√) Check the applicable box(es) to describe the type of supervisory responsibility required by an incumbent in the 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:
 -

* 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.

- Budget & Financial Analysts
- Budget Managers
- College staff

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 | 1 to 4 |
| Non Full Time Staff (FTE) * | |
| Contract for Service ** | |
| Total: | 1 to 4 |

*** 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 (part-time, 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 for extended periods | | | | X | |
| Computer work station | | | | X | |
| Talking on the telephone | | | 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 |
| Concentration / Attention to Detail | | | | X | | I |
| Preparing reports / analysis/ Complex spreadsheets | | | X | | | I |
| Frequent interruptions and changing priorities and demands | | | X | | | S |

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. |
| 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 |
| Travel by car to other campuses | 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 |
| Not applicable | | | |
| | | | |
| | | | |
| | | | |

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: