

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

Effective: 4-Dec-2025

College: St. Lawrence College
Incumbent: Vacant
Position Title: Director, Financial Planning & Analysis
Payband: 13
Division/Department: Finance
Location/Campus: Kingston (Hybrid)
Immediate Supervisor (title): Vice-President Finance, Procurement, Risk, and CFO

Type of Position:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Administrative | <input type="checkbox"/> Part-Time Administrative |
| <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 Vice-President Finance, Procurement, Risk, and CFO, the Director of Financial Planning and Analysis leads the day-to-day operations of the Budgets & Planning department and participates in all budget functions of the College. This position is responsible for the development, implementation and maintenance of the College's budgeting and forecast planning processes. As a member of the management team, the Director participates in medium- and long-term strategic planning for the College. The Director is responsible for program costing, financial models/analysis and reports to provide senior management with accurate and relevant information for decision making and reporting purposes.

In addition, the incumbent has ownership of the budgeting software (currently Budget Maestro) and Peoplesoft Nvision 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 incumbent has responsibility for interpretation and compliance with Ministry policy in certain areas.

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.

KEY DUTIES

% OF TIME

1. STRATEGIC PLANNING and INITIATIVES

(20%)

- Develops the College's short-term and long-term financial targets
- Designs the structure of the College budget, ensuring alignment with
- strategic goals
- Provides capital allocation decision support to the Senior Leadership Team (SLC)
- Works with the Capital Planning Committee and its processes including the development and implementation of business case templates, capital envelop, and asset allocation
- Finance representative on the Strategic Enrolment Management Subcommittee (enrolment planning, program development and viability)
- Provides financial assumptions and business planning recommendations to
- the Senior Leadership Team (SLT) and College Leadership Team (CLT)
- Engages College leaders throughout the course of the calendar year to assess progress towards achievement of forecast/budget. Identify barriers to achievement, help identify appropriate solutions and introduce new considerations given new and emerging College needs
- Compiles and analyzes data and conducts the research required for the preparation, analysis, interpretation, and evaluation of new projects/initiatives, identifying the institutional, financial, and other implications and making recommendations for action as required.
- Leads the preparation of business cases and proposals for financial sustainability initiatives working with Senior Leadership Team members and leaders from across the College
- In collaboration with the Director, Strategy and Planning, facilitates the intake process for possible new capital projects from senior leaders, management teams, and professional service firms

2. ANNUAL FINANCIAL PLANNING AND FORECASTING:

(30%)

- Leads the systematic development and management of the annual budget, mid-year forecast and 3rd quarter review processes.

- Determines and recommends to the Vice-President Finance, Procurement, Risk, and CFO the revenue and expenditure parameters of the annual budget and three-year pro-forma projections for the approval of the Senior Leadership Team (SLT).
- Responsible for the planning, organizing and managing the preparation of all financial components of the College's annual budget, budget preparations instructions, and budget templates.
- Facilitate position planning by liaising with the Belonging, People, and Culture to ensure alignment and consistency with the College's Strategic Workforce Planning plan.
- Responsible for the development of financial models and analytical reports to identify and communicate risks and opportunities for the College, supporting decision making and enabling continuous business process improvements
- Assesses risks and assists budget managers with developing line-item and cost centre budgets for salary and non-salary costs.
- Conducts departmental budget reviews with Budget Managers and oversees the ongoing financial results of operations and capital projects, and to review variance reports. Using this information the Director will direct updates to the quarterly revenue and expenditure projections by providing direction to the Financial Planning and Analysis Team.
- Provide support College committees such as the Budget Advisory Committee, the Finance, Resource and Audit Committee, the Strategic Enrolment Management Subcommittee, and other ad-hoc committees that require the expertise of the incumbent.
- Prepares budget and forecast documents for Board of Governor's approval and Ministry submission. Closely monitor Board of Governors, Senior Leadership Team, Budget Advisory Committee, and Ministry updates to ensure that financial impacting items are incorporated into financial plans, budgets, models and forecasts.
- Acts as a resource and advisor to budget managers and College staff in the process of budget preparation, analysis and interpretation of financial results.
- Researches, develops and analyzes management information in support of resource allocation decisions.
- Prepares program costing and financial analysis for potential new programs, projects or initiatives and various scenarios

3. FINANCIAL PERFORMANCE AND RISK ANALYSIS AND REPORTING:

(20%)

- Recommends and implements strategies, practices, policies, and processes for budget management in consultation with the Vice-President Finance, Procurement, Risk, and CFO.
- Researches and recommends financial performance measurement processes and practices.
- Responsible for the coordination and filing of reports in accordance with Ministry Binding Policy Directives: Annual Budget and mid-year forecast CFIS format; Student Assistance Set Aside, and others and act as the College contact for Ministry feedback and requests for further information.
- Responsible for the enhancement and implementation of the program costing model and completion of annual program costing.
- Develops and administers an effective budget-stewarding strategy to enhance financial awareness throughout the College.
- Oversight of development of specialized training sessions and manuals for various user groups.
- Develops, prepares and evaluates internal and external financial trends and provides insightful, high value analysis to leadership to inform budget planning and management (analytics).
- Liaises with other Colleges or external agencies to research data and best practices as required

4. FINANCIAL SYSTEMS

(15%)

- Ownership of the budgeting software EPM (previously Budget Maestro) and Peoplesoft Nvision reporting including the analysis and recommendation of new systems/reports and upgrades.
- Provides support, guidance, training and solutions for reporting and budgeting systems.
- Develops and implements forecasting systems to accurately predict financial results.
- Develops and continually refines appropriate modeling techniques to facilitate medium- and long-term financial forecasting.
- Takes leadership role in system and process improvement, implementation and change management.
- Manages the strategy of the organization and configuration of departments and programs within Peoplesoft.
- Initiates system enhancements and innovations for budgeting and costing techniques.

5. ADMINISTRATION

(10%)

- Provides leadership and supervision to staff by determining work priorities and providing strategic and tactical advice, guidance and coaching.
- Maintains a high level of performance through effective recruiting, selecting, developing, motivating, evaluating and training of staff.
- Assesses staff training and development needs and ensure that employees receive training required to improve and sustain successful performance.
- Manages performance by establishing performance standards, review and evaluate performance and conduct formal performance reviews on an ongoing basis.
- Develops and fosters positive relations with customers, departmental peers and direct reports.
- Performs related duties and responsibilities as required in support of 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 that meet the users and college's needs, understanding the sequence of events required to ensure a logical and efficient process.
- b) Determine suitable recommendations for planning and administering an effective budget-stewarding strategy to enhance financial awareness throughout the College.
- c) Advise and recommend to the Director on appropriate procedures, systems and organization for the provision of information to internal and external partners.

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

☐ 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: CPA

☐ Other

Specify:

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

Minimum 4-year university degree with a Chartered Professional Accountant (CPA) designation. An equivalent combination of education and experience may be considered.

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).

- Comprehensive knowledge and understanding of Public Sector Accounting Standards.
- Advanced working knowledge/competence in the use of integrated financial systems.
- Exceptional analytical skills combined with intuition and creativity.
- Ability to resolve issues independently, with limited supervision by senior management.
- Demonstrated understanding of financial analytics, planning and forecasting techniques, as well as business processes.
- Excellent interpersonal and communication skills. Ability to explain accounting procedures with non-financial personnel (Deans, Directors Budget Managers) across the diverse College community.
- Ability to deal confidently with senior managers, staff members, Ministry representatives, etc.
- Expert with advanced functions in Excel.
- Highly client service oriented.
- Demonstrated ability to present complex financial, statistical and other information in a clear and understandable manner.
- Demonstrated proficiency in contemporary budgeting, forecasting and modelling, as well as an advanced proficiency in preparing, management reports and business plans.

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"/> 0 - no experience | <input type="checkbox"/> 3 years |
| <input type="checkbox"/> 1 month | <input type="checkbox"/> 5 years |
| <input type="checkbox"/> 3 months | <input type="checkbox"/> 7 years |
| <input type="checkbox"/> 6 months | <input checked="" 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.

- Minimum 9 years' experience developing, maintaining and controlling multi-divisional budget and financial systems.
- Demonstrated experience working successfully with people at all organizational levels, and with diverse and sometimes conflicting interests and philosophies.
- Proven prior supervisory experience to demonstrate strong leadership and team development skills.

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) Determine appropriate support, guidance and advice while supporting departments and faculties with budget administration.
- b) Advise budget managers and College staff in the process of budget preparation, analysis and interpretation of financial results. Identify budget risk areas and discuss with budget managers.
- c) Analyze and recommend appropriate levels of funding for new initiatives being proposed; determine strategic and tactical approach in the development and implementation of initiatives.

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) Design and content of the Annual Budget report and statements to be presented to the Board.
- b) Implementing new budgeting policies.
- c) Implementation of recommended revenue and expenditure parameters of the annual budget and 5-year budget projections.

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 metrics and measures, affecting quality of decisions made, of information presented to Senior Management and/or Board, and in the longer term financial or reputational peril.
- 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. In the longer-term severe impairment of the College's sustainability, reputation, and quality of programming could result.
- c) Incorrect or erroneous interpretation or application of current Ministry calculation methodologies, policy and procedures (which are changed or updated on a regular basis) or Funding Formulas could result in grant penalties, eroded relationship with Ministry and with Board, damage to community and student trust and respect.

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:				
Internal to the college, e.g. students, staff, senior management, colleagues.	Financial Services	Advise on setup of new accounts, programs. Share budget info as required and assist with variance analysis.		X
	Academic Division	Provide program costing and analysis for new programs and annual performance of existing programs	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	Coordinate obtaining budget and forecast EAP and tuition rate information from Registrar.	X	
	Strategic Corporate Planning	Liaise on development and monitoring of Strategic Initiative budgets	X	
External to the College:				
External to the college, e.g. suppliers, advisory committees, staff at other colleges, government, public/private sector.	Ministry of Colleges and Universities (MCU)	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.

- Manager, Budgets & Planning
- Budget Officers
- 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	2
Non-Full Time Staff (FTE) *	0.5
Contract for Service **	
Total:	2.5

*** 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 workstation				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: