

**St. Lawrence College
Position Description Form (PDF)**

Revision Date: June 20, 2024

Campus: Kingston

Incumbent's Name: Vacant

Position Title: Business & Finance Officer, Facility Management Services

Payband: H

Position Number: 00000267

Hours per Week: 35

Supervisor's Name and Title: Beth Sills, Director Facility Management Services

Completed by: Beth Sills

Signatures:

Incumbent: _____

(Indicates the incumbent has read and understood the PDF)

Date: _____

Supervisor: _____

Date: _____

One-over-One: _____

Date: _____

Support Staff PDF

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 of 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 representative 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 Facilities Management Services Business & Finance Officer is responsible for supporting the operational and financial functions of the Facility Management Services Department across the Cornwall, Brockville and Kingston Campuses plus several satellite locations. The incumbent is accountable for producing accurate information related to the functions of Financial Support, Human Resources Support, Business Support and Customer Service as well as any related administrative processes. The Business & Finance Officer is also responsible for supporting initiatives associated with the Ministry, and College Board and Executive Committee. The Business & Finance Officer provides guidance to Departmental staff, as required.

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 the Time Annually*
FINANCIAL SUPPORT:	70 %
<ol style="list-style-type: none"> 1. Supports the annual operating budgeting process and inputs the operating budgets into Budget Maestro as directed by the Director, FMS. 2. Ensures the accuracy of invoices and verifies the correct PO number and accounting string. 3. For Operating and Maintenance invoices, verifies the completion of work with FMS staff and compiles the verified invoices for review and sign-off by the Associate Director Engineering, Operations and Maintenance. 4. Compiles utility invoicing and assigns accounting details for review. 5. Provides support to troubleshoot discrepancies in financial activity for both revenue and expenses as directed by the Director FMS, Associate Directors and Managers. 6. Using PeopleSoft investigates budget discrepancies. 7. Prepares Capital change forms and journal vouchers. 8. Assists the Director, Associate Directors and Managers in the drafting of internal and external reports. 9. Collects data for OCFMA benchmarking, and other reports as needed for review by Director/Associate Directors/Managers. 10. Develops processes and procedures required to ensure accurate reporting by the facility services officers. 	
ADMINISTRATIVE SUPPORT AND CUSTOMOR SERVICE	20 %
<ol style="list-style-type: none"> 1. Receives, compiles and responds to initial external department communications and escalates and prioritizes communication to Director/Associate Directors/Managers of material or matters requiring attention/action. 2. Prepares minutes, PowerPoint presentations and related material for departmental, interdepartmental and committee meetings. 3. Ensures stocking of office supplies and required software licenses. 4. Maintains a good understanding of the Facility Management Services department and responds to inquiries on behalf of the Director/Associate Directors/Managers on a range of issues. 5. Is the first point of contact for the FMS direct phone line and email and triages issues to the appropriate FMS team member during office hours. 6. Assists the Facilities department with customer complaints and informs the Director, Associate Directors and Managers as required. 7. Supports Facilities related communication to the college (i.e. notices of elevator down-time). 8. Responsible for the day-to-day administrative operation of Facility Management Services by: <ol style="list-style-type: none"> A) Supporting FMS in liaising with the Campus coordinators, Consultants, Contractors and Suppliers, B) and assessing and developing office procedures to ensure effective and efficient provision of facility services. 9. Responsible for the compilation and retention of all business records of Facilities Management Services including: leases, contracts and financial transactions, legislative reporting. 10. Ensures regular review of department processing procedures for continuous improvement purposes. 11. Supports the compilation of FMS service delivery for reporting and communication purposes. 	

Support Staff PDF

HUMAN RESOURCES SUPPORT:	5%
<ol style="list-style-type: none"> 1. At the direction of the Director of FMS, develops the Facility Management Services Department's Training Plan, keeps up to date training records and required safety training (i.e. working at heights, confined space etc) for FMS staff. 2. Administers the payroll documentation for the full-time and part-time/casual employees of Facility Management Services. 3. Tracks lieu time. 	
OTHER DUTIES::	5 %
<ol style="list-style-type: none"> 1. Performs other related duties, as assigned 	
TOTAL	100%

* 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.

- | | | |
|--|--|--|
| <input type="checkbox"/> Up to High School or equivalent | <input type="checkbox"/> 1-year certificate or equivalent | <input type="checkbox"/> 2-year diploma or equivalent |
| <input type="checkbox"/> Trade certification or equivalent | <input checked="" type="checkbox"/> 3 year diploma/degree or equivalent | <input type="checkbox"/> 3-year diploma / degree plus professional certification or equivalent |
| <input type="checkbox"/> 4 year degree or equivalent | <input type="checkbox"/> 4-year degree plus professional certification or equivalent | <input type="checkbox"/> Post graduate degree or (e.g. Masters) or equivalent |
| <input type="checkbox"/> Doctoral degree or equivalent | | |

Field(s) of Study:

Business Administration

B. Check the box that best describes the requirement for the 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 requirements that would typically be included in the job posting and would be acquired prior to the commencement of the position. Do not include courses that are needed to maintain a professional designation.

- No Additional requirements
- Additional requirements obtained by course(s) of a total of 100 hours or less
- Additional requirement obtained by course(s) of a total between 101 and 520 hours
- Additional courses obtained by course(s) of more than 520 hours

Empty dashed box for specifying additional requirements.

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 years 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 the 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

Minimum of three (3) years

Practical, progressively responsible work experience performing business functions and tasks. Demonstrated budget analysis experience and ability to multitask, prioritize and plan. Experience with PeopleSoft is strongly desired.

Minimum of five (5) years

Minimum of eight (8) years

3. Analysis and Problem Solving

This section relates to the application of analysis and judgment 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 judgment 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.	Ongoing budget variables, accounting activity discrepancies, effective annual budget preparations, i.e. comparing budget to actuals, incumbent identifies overages and discrepancies in reports and reporting
How is it identified?	Incumbent performs ongoing comprehensive review of internal month end reports and maintains close liaison with Financial Services
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent performs detailed account analysis
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Incumbent works independently to find a solution, i.e. examines line by line to find any discrepancies, manually checks invoices and account distribution, notifies Financial Services of solution and works collaboratively with stakeholders in remedying discrepancy.
What sources are available to assist the incumbent finding solution(s)? (eg. past practice, established standards or guidelines.)	PeopleSoft Financial System, ongoing internal reports, ongoing review of budget and accounts

3. Analysis and Problem Solving

#2 regular & recurring	
Key issue or problem encountered.	Utility billing anomaly.
How is it identified?	Monthly review of utility bills by Associate Director reveals an anomaly.
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent verifies the payment via PeopleSoft ledger reports to determine if there has been an error in allocation.
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Incumbent would ensure that utility payments have been coded to the correct lines. Incumbent would insure that quarter Journal Vouchers have been issued. Incumbent would communicate with Finance regarding any coding irregularities and support moving expenditures to proper accounts.
What sources are available to assist the incumbent finding solution(s)? (eg. past practice, established standards or guidelines.)	Incumbent would utilize standard Peoplesoft reporting, management expertise, standard account practices established within the College.

#3 regular & recurring	
Key issue or problem encountered.	Contract work remuneration past due
How is it identified?	Incumbent receives written, email or telephone notification from contractor
Is further investigation required to define the situation and/or problem? If so, describe.	Incumbent checks PeopleSoft online accounts and TopDesk. Backtracks to date work was completed and checks method of payment used, i.e. Visa or Invoice
Explain the analysis used to determine a solution(s) for the situation and/or problem.	Incumbent checks with staff involved in work contracted, i.e. FMS Staff/Coordinators, Directors. Incumbent researches and consults with significant staff re status/source of work, was it done, is it on hold, why? Follow up with Contractor in a timely manner to resolve Staff/Financial Services
What sources are available to assist the incumbent finding solution(s)? (eg. past practice, established standards or guidelines.)	

4. Planning/Coordinating

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

In the following charts, provide up to three (3) examples of planning and/or coordinating that are regular and recurring to the position, up to two (2) examples that occur occasionally:

	#1 regular and recurring
List the project and the role of the incumbent in this activity.	Gathers information for the budgeting process. Assisting in the coordination of Committee meetings with many participants (i.e. large capital projects, Sustainability Implementation Committee). Planning the timetable for the department mandatory health and safety training (i.e. working from heights; confined space etc.).
What are the organizational and/or project management skills needed to bring together and integrate this activity?	Time management, analytical skills, working knowledge of the Financial system (PeopleSoft), communication skills and the ability to influence staff to produce information in a timely manner. Work across departments to gather information, plan and execute co-departmental events or solve co-departmental issues.
List the types of resources required to complete this task, project or activity.	Microsoft Excel, knowledge of Peoplesoft reporting systems, specific reports to run and monitor, people-skills, budget-management skills, communication skills.
How is/are deadline(s) determined?	Under direction from the Director who is working within SLC Department of Finance requirements.
Who determines if changes to the project or activity are required? Who determines whether these changes have an impact on others? Please provide concrete examples.	Incumbent is well aware of budget timelines, ministry reporting deadlines, and will work closely with the Director, Associate Directors and Managers. Incumbent will work with and allocate data to assist other FMS staff in managing their significant areas of financial responsibility to meet budget deadlines.

4. Planning/Coordinating

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? Who determines whether these changes have an impact on others? Please provide concrete examples.

#2 regular and recurring

Maintains tri-campus energy consumption and cost tracking and works with the Manager of Sustainability to summarize the GHG emissions associated with energy.

Understanding utility invoicing variables, communication skills, scheduling, analytical skills, problem solving skills

Proficiency in Excel to draw ongoing comparisons in consumption. Formula building to summarize cumulative tables to establish ongoing totals. Use of pivot tables and graphic techniques. Familiarity with various online utility portals.

Ongoing requests from Associate. Directors, and external agencies for reporting

Incumbent may make suggestions to improve reporting/tracking processes for the Director's consideration. i.e. if modifying the manner in which data is input will save time/resources on the various reporting requirements.

5. Guiding/ Advising Others

This section describes the **assigned responsibility** of the position to guide or advise others (e.g. other employees, students). Focus the actions taken (rather than the communication skills) that directly assist others in the performance of their work skill development.

Though support staff cannot formally “supervise” others, there may be a requirement to guide others using the incumbent’s job expertise. This is beyond being helpful and providing ad hoc advice. It must be an assigned responsibility and must assist or enable others to be able to complete their own tasks. Check the box(es) that best describe the level of responsibility assigned to the position and provide an example(s) to support the selection, including the positions that the incumbent guides or advises.

Regular & Recurring	Occasional	Level	Example
<input type="checkbox"/>	<input type="checkbox"/>	Minimal requirement to guide/ advise other. The incumbent may be required to explain procedures to other employees or students	
<input type="checkbox"/>	<input type="checkbox"/>	There is a need for the incumbent to demonstrate correct processes/ procedures to others so that they can complete certain tasks	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	The incumbent recommends a course of action or makes decisions so that others can perform their day-to-day activities.	Provides direction to FMS staff when clarification is required regarding the process for Purchase orders. Provides direction to staff on, the reconciliation of purchasing cards and submission of time sheets and salary and status change forms.
<input checked="" type="checkbox"/>	<input type="checkbox"/>	The incumbent is an active participant and has ongoing involvement in the progress of others with whom he/she has the responsibility to demonstrate correct processes/procedures or provide direction.	The incumbent may design and implement a number of processes to be shared by FMS staff. Provides direction to bursary students as required.
<input type="checkbox"/>	<input type="checkbox"/>	The incumbent is responsible for allocating tasks to others and recommending a course of action or making necessary decisions to ensure the tasks are completed.	

6. Independence of Action

Please illustrate the type of independence or autonomy exercised in this 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)
Incumbent is aware of responsibility within each functional area of position. Receives guidelines from the Director for new projects. Contract documents outline some requirements that incumbent reviews and acts accordingly.	

What rules, procedures, past practices or guidelines are available to guide the incumbent?	
Regular and Recurring	Occasional (If none, please strike out this section)
College policies and procedures, departmental guidelines and processes are available for use as required.	

How is work reviewed or verified (e.g. Feedback from others, work processes, supervisor)?	
Regular and Recurring	Occasional (If none, please strike out this section)
Incumbent performs functions of position independent of regular supervision. Meets with Director to exchange data and information.	

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)
Coordinating training for staff.	

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)
Triages student and human resources complaints	

Describe the type of decisions that would be decided by the incumbent.

Regular and Recurring	Occasional (If none, please strike out this section)
The incumbent is expected to use his/her own initiative and creativity in carrying out all the functions involved in the position. The incumbent is responsible for determining the most appropriate source of information, both inside and outside the College, when researching issues.	

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 a 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 fulfill 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?		
An email request, to the Director, to provide a quick update to Senior Management, by the end of the day, on the status of a project/activity.	Determine the resources available to respond. Initiate the response by mobilizing the available resources and collecting known information for Director to respond.	Senior Management	W
Requests for office moves are received In-person, or by email	Ensure that the request has the requisite approvals. Determine the specific requirements and details to complete the move. Initiate work orders to complete the move	Staff, students, contract movers, furniture and equipment suppliers and other College departments such as I.T.	D

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

8. Communication

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

Communication Skill/Method	Example	Audience	Frequency (D,W,M,I)*
Exchanging routine information, extending common courtesy	Finance/ budget reporting processes re PeopleSoft Financial System	Campus Staff, Director	M D
Explanation and interpretation of information or ideas.	PeopleSoft Financial Timelines are crucial in completing work orders. Monitoring financial activity i.e. invoicing, reconciliations is completed in a timely manner. Timelines for meeting dates internally and externally for Directors and Coordinators to ensure availability	Campus Staff Department Executive Committee Administrative Assistants Consultants & Contractors	D
Imparting technical information and advice	Instruct staff on correct use of office equipment, e/g scanner, fax, copier Peoplesoft and TopDesk data entry, Provide review of budgets.	FMS Staff Department staff	W W
Instructing or training			
Obtaining cooperation or consent	Obtains consensus of multiple stakeholders, such as college staff, departmental staff, service providers, suppliers and regulatory agencies to project elements including schedule, scope and cost.	Campus Staff Department staff Regulatory representatives Suppliers Consultants & Contractors	W
Negotiating			

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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, and 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	D			X	X		
Walking	D	X			X		
Standing	D	X			X		
Climbing							
Bending/crouching	D	X			X		
Lifting/carrying	W	X			X		
Pulling/pushing	W	X			X		

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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 and 11 to 44 lbs.)

Heavy (over 20 kg. or 44 lbs.)

Office supplies

Occasionally required to lift and carry office supplies, drawings, specifications and tender documentation.

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 the task and the duration of the task, including breaks (e.g. up to two hrs. 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 (e.g. multi-tasking where each task requires focus or concentration)
- whether the level of concentration can be maintained throughout the task or is broken due to the number of disruptions

Provide up to three (3) examples of activities that require a higher than usual need for focus and concentration.

Activity #1	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Monthly budget reports	M		X	
Can concentration or focus be maintained throughout the duration of the activity? If not, why?				
<input type="checkbox"/> Usually <input checked="" type="checkbox"/> No – due to numerous deadlines caused by diverse responsibilities. Workload has multiple, conflicting and overlapping demands				

Activity #2	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Budget preparation and maintenance	I			X
Can concentration or focus be maintained throughout the duration of the activity? If not, why?				
<input type="checkbox"/> Usually <input checked="" type="checkbox"/> No – due to numerous deadlines caused by diverse responsibilities. Workload has multiple, conflicting and overlapping demands				

Activity #3	Frequency (D,W,M,I)*	Average Duration		
		Short < 30 min	Long up to 2 hrs.	Extended > 2 hrs
Compiling reports	W	x		
Can concentration or focus be maintained throughout the duration of the activity? If not, why?				
<input type="checkbox"/> Usually <input checked="" type="checkbox"/> No – due to numerous deadlines caused by diverse responsibilities. Workload has multiple, conflicting and overlapping demands				

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11. Working Environment

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

Working Conditions	Examples	Frequency (D,W,M,I)*
<input checked="" type="checkbox"/> acceptable working conditions (minimal exposure to the conditions listed below)	Normal office environment	D
<input type="checkbox"/> accessing crawl spaces/confined spaces		
<input type="checkbox"/> dealing with abusive people		
<input type="checkbox"/> dealing with abusive people who pose a threat of physical harm		
<input type="checkbox"/> difficult weather conditions		
<input type="checkbox"/> exposure to very high or low temperatures (e.g. freezers)		
<input type="checkbox"/> handling hazardous substances		
<input type="checkbox"/> smelly, dirty or noisy environment		
<input type="checkbox"/> travel		
<input type="checkbox"/> working in isolated or crowded situations		
<input checked="" type="checkbox"/> other (explain)	Dealing with upset employees, contractors and others during emergencies and is subject to occasional verbal abuse from outside vendors.	I

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