

Job Fact Sheet Questionnaire

**JFS QUESTIONNAIRE
COLLEGES OF APPLIED ARTS AND TECHNOLOGY OF ONTARIO
JOB FACT SHEET (JFS) QUESTIONNAIRE FOR
NON-BARGAINING UNIT POSITIONS**

This job fact sheet (JFS) questionnaire is intended to gather information about a position for job evaluation purposes. It does not measure the incumbent's performance.

Please read each section carefully before completing the JFS questionnaire.

If this JFS questionnaire is to cover more than one incumbent performing the same job, attach a list of employee names and signatures along with the corresponding position numbers.

IDENTIFICATION

College	Fanshawe College
Position Title and Department:	Functional Lead, Finance
Name:	
Immediate Supervisor:	Finance ERP Lead / Manager

Reason for Submission: Enter an X to select the reason for submission

<input checked="" type="checkbox"/>	New Position	<input type="checkbox"/>	Revised Position
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Type of Position: Enter an X to select the 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

Effective date of JFS Questionnaire: _____

I have read and understood the Job Fact Sheet:

Incumbent's Signature: _____

Date: _____

Recommended by:

Immediate Supervisor: _____

Date: _____

I Concur:

Human Resources: _____

Date: _____

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A. Position Summary

Summarize the overall purpose of the position within the College. The summary should be a concise description (rarely more than two or three sentences) of the total position and should include only the most significant aspects of why the position exists in terms of its goals, objectives and purpose in the College.

The Functional Lead contributes to a multi-year project to implement a new Finance system for Fanshawe College. This project is part of the larger, strategic Enterprise Resource Planning (ERP) project in which digital solutions for HR, Finance and Student systems will enable the College's future directions. The project contributes to the College's digital and data strategies.

The project vision is to deliver a flexible Finance Technology solution that enables an integrated, and user friendly experience while enhancing Finance processes delivery through innovation, self-service and reliable data.

The Functional Lead is part of the Finance ERP Implementation Team consisting of people from the College and the technology vendor including Functional Analysts and Functional Leads, the Finance Project Manager, IT Leads and Analysts, ERP Project Manager and the Vendor System Implementer within the Governance structure of the ERP.

Reporting to the Finance Project Manager, the Functional Lead has deep experience in their functional area and leads activities including consultations with stakeholders, subject matter experts, and technical experts to make decisions about system configuration, security, workflows, data management and analytics, reporting and system integrations. The incumbent participates in creating policy and risk protocols for the overall Finance operations enabled by the new technology and in activities related to user adoption.

The Functional Lead oversees the work of a Functional Analyst performing data migration, data conversion, process design, system configuration, report design, documentation, user acceptance testing, and go-live and post go-live troubleshooting support and activities.

The below lists all the preliminary finance process areas that will be covered within the scope of the ERP Project.

- Procure to Pay
- Order to Cash
- Close, Consolidate and Report
- Fixed Asset Management and Capital Projects
- Grants and Endowments processes including Reporting.
- Planning, Budgeting & Forecasting
- Travel and Business Expenses

The College is committed to the safety and well-being of all staff, students and visitors. In order to achieve this objective, employees are required to be active in health and safety and incident prevention by adhering to procedures and safe work practices as required by the corporate health and safety management system, and in accordance with relevant Health and Safety legislation and regulations.

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B. Key Duties

Describe the key duties of the position. Use examples if they assist in describing the position. Estimate the percentage of time spent on each duty (to the nearest 5%). Add an extra page if necessary.

Duties	% of Time
<p>Pre-implementation</p> <ul style="list-style-type: none"> • Provide knowledge of the functional area as delivered currently inside and outside the technology solution • Through an analysis of current state needs, confirm future operational goals for the functional area. Make decisions or recommendations to the Finance Project Manager as appropriate on process changes to improve data accuracy, user experience and increase efficiency. • Preliminary process design and evaluating impacts of process changes • Complete implementation skills training (i.e., Cloud solution training) • Provide input to key project deliverables (e.g., project workplan) • Contribute to establishing the work process and relationships of the full project team including others in Human Resources, Information Technology Services, Project Governance members, and stakeholders across the college. 	20
<p>System design</p> <ul style="list-style-type: none"> • Identify needs, dependencies and constraints for functional area in consultation with subject matter experts, stakeholders, and experts from the technology vendor (System Implementer). • Act as the single point of contact to identify and collect information from experts in specialized areas to ensure timely and accurate information. • In consultation with subject matter experts and with the identified future business and financial requirements, make decisions on future state functionalities. • Identify future system requirements and map processes. • Identify change impacts for end users and other stakeholders. • Understand the cross functional Finance technology capabilities and provide input into other areas for alignment across the technology. 	25
<p>System Configuration</p> <ul style="list-style-type: none"> • Ensure future business process and financial requirements are appropriately reflected in system configuration (end to end processes) and aligned with the future service delivery model • Sign off on future business / financial processes and configuration values • Ensure alignment of functional decisions with business requirements by evaluating effectiveness of new processes, adapting to changes in design and discussing significant process changes with other Functional Leads. • Manage communication between internal subject matter experts to get a comprehensive understanding of decisions' impacts on the overall solution • Provide feedback as prototypes and test scenarios are developed • Resolve escalated risks, issues and decisions related to business / financial process design, system configuration and configuration • Escalate risks with a significant cost or time impact to the Finance Change Lead 	20

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Duties	% of Time
<p>Data Conversion and Reporting</p> <ul style="list-style-type: none"> • Coordinate with subject matter experts, and project team to make decisions related to data migration and conversion from current Finance systems • Support data mapping and validation for mock conversions and test scenarios. Contribute to reporting requirements and ensure business requirements are understood by the technical team • Manage data conversion validity through iterations (data transformation, loading and reconciliation) 	10
<p>System documentation and training</p> <ul style="list-style-type: none"> • Contribute content for training materials for end-user training • Review and sign off on data configuration and business process documentation • Sign off on documentation for training and change activities 	5
<p>Testing</p> <ul style="list-style-type: none"> • Collaborate with IT Leads and Functional Analyst in SS/HR/Finance to design testing scenarios and scripts • Confirm if system is working as per the functional and business requirements • Provide input to system configuration adjustments and other changes based on testing • Provide final-sign off on adjustments and system changes made based on testing 	10
<p>Go-live and post go-live support</p> <ul style="list-style-type: none"> • Contribute to the cutover plan and manage cutover tasks for go-live • Answer end user system related questions, resolve issues and support end user transition and adoption • Contribute to strategies for end-user adoption • Report on any system capabilities not working as expected and resolve with IT leads and Functional Analyst in HR/SS/Finance. • Solicit feedback on user experience and satisfaction with system functioning • Identify opportunities for process and system improvements and recommend necessary adjustments • Establish routines for system upgrades and sustainment utilizing vendor resources and expertise 	10

C. Education And Formal Training

- (a) Identify the minimum level of education, formal training or equivalent required for the position at the point of hire. Do not indicate the incumbent's specific education/formal training, since it may be more or less than the minimum educational qualifications necessary for the job.

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Note that for each level, other educational requirements apply where they require equivalent hours and level of study and examination. If this is the case please describe the equivalency requirements in the Comments box.

Enter an X to select the minimum education required:

	Elementary School or equivalency
	Partial Secondary School or equivalency
	Secondary School or equivalency
	Post Secondary: 1 year certificate
	Post Secondary: 2 year diploma
x	Post Secondary: 3 year diploma/degree
	Post Secondary: 4 year degree
	Post Secondary: Master's degree
	Post Secondary: Doctoral degree
	Professional Designation
	Other

Comments:

- (b) Specify/describe any program specialty, certification or professional designation necessary to fulfill the requirements of the position.

Finance or Supply Chain Management with equivalent professional designation, or active enrollment in, such as CPA or SCMP.

- (c) Specify/describe any special skills or training necessary to fulfill the requirements of the position (e.g. computer software, client service skills, conflict resolution, operating equipment).

The role requires experience working in a project environment with multiple priorities and strict time constraints. Strong team work, consultation, analytical, problem-solving and decision skills. Prior experience using cloud-based HR technology is preferred.

D. Experience

Identify the minimum practical work related experience required at the point of hire into this position in addition to the education/formal training identified in Section C. Do not include the incumbent's specific experience/qualifications since it may be more or less than the minimum necessary for the job.

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Enter an X to select the experience required up to and including:

	No experience
	1 month
	3 months
	6 months
	9 months
	1 year
	18 months
	2 years
	3 years
	4 years
x	5 years
	7 years
	9 years
	11 years
	13 years
	15 years
	17 years

Comments:

Demonstrates practical experience with financial reports and analysis.
Progressive experience working in a computerized accounting system.
Excellent understanding of business processes financial and procedures.
Strong analytical, problem-solving, communication, consultation and decision skills are required along with advanced MS Word, PowerPoint, Excel and Visio skills.
Ability to work with multiple priorities and strict time constraints.
Preferred prior experience in a project environment.

E. Initiative - Independence Of Action

Every job has expectations concerning decision making in the performance of duties. Decision making responsibilities vary according to the level of complexity of the material or information upon which decisions are being made, the judgment that is required in making decisions and the limitations which are placed on an incumbent's authority to act before obtaining direction or approval from a supervisor.

- (a) Briefly describe three decisions/job duties which the incumbent performs without having to obtain direction or approval from the supervisor.

1	Responsible for development, testing, communication with the vendor and final sign off for functional area process design and process mapping.
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2	Responsible for development, testing, communication with the vendor and final sign off for functional area system configuration
3	Responsible for development, testing, communication with the vendor and final sign off for testing scenarios and scripts

(b) Briefly describe three decisions/job duties for which the incumbent is required to obtain direction or approval from a supervisor.

1	Alterations of functional area project timelines that impact other functional areas and overall project timelines
2	Decisions about data conversion that require change to established principles and guidelines for data conversion across all functional areas
3	Delays in issues being reconciled that are brought to the ERP project leaders or Governance team

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

Technology vendor training, websites and documentation, documented future business requirements, documented future process design, College policy, collective agreements, Terms and Conditions for Administrative Staff, employment legislation.

F. Potential Impact Of Decisions

Give examples of the types of errors in judgment that the incumbent could make in performing the duties of the position, when exercising due care. 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, effect on staff, students, clients or public.

Error	Probable Effect
Failing to perform a full investigation of system functionality prior to sign off of system configuration	Financial losses due to additional costs of system reconfiguration and retesting, retraining staff. Possibility of significant data accuracy loss and delays in overall ERP project timeline
Failing to identify a critical aspect of business requirements	Financial losses due to rework and extending project deadlines. Reputational loss with senior leaders and College Board.

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G. Contacts And Working Relationships

Indicate whom the incumbent is required to interact with in the performance of his or her duties. Use job titles. Describe the nature, purpose and frequency of the contact, e.g. exchanging information, teaching, conflict resolution, team consultation, counseling.

Frequency: Occasional (O) Means once in a while over a period of time
 Frequent (F) Means repeated contact over a period of time

Internal Contact: Students, staff, senior management, colleagues
 External Contact: Suppliers, advisory committees, staff at other Colleges, government, general public

Contacts Internal (I) External (E)	Nature and Purpose of Contact	Frequency (O) (F)
Internal: Finance Subject Matter Experts	Consultation on business requirements, process design, data sources and data needs, conflict resolution – decision making on process decisions where subject matter experts may have opposing opinions	F
Internal: Finance ERP Project Lead	Report of functional area progress relative to project timelines, risks of missing deadlines, unforeseen issues and how they will be mitigated, escalated conflict resolution	F
Internal: Functional Analysts	Validation process maps and integration points with other functional areas, data sources, requirements from IT Leads	F
External: System Implementer	Articulating business requirements and investigating system functionality. Conflict resolution on system/process discrepancies.	F

H. Supervision/Functional Guidance

Definitions for the purpose of this JFS:

- Division: a grouping of Departments, typically lead a VP or EVP, or a Faculty comprising several Schools.
- Department: within a Division, fully responsible for management and delivery of a major function (e.g. Finance) or School within a Faculty. Typically lead by a Director or Senior Director.

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- Program Area: within a Department, manages/supervises a focused part of the Department's activities (e.g. financial planning). Typically lead by a Manager or Senior Manager. Depending on organizational structure, may also be a small Department.

Supervision/Functional Guidance Category	Specify Staff (Title and group names)
Manages the staff and operations of the entire College.	
Manages the staff and operations of a Division.	
Manages the staff and operations of a major Department.	
Acts as a consultant to College management	
Manages/supervises the staff and operations of a Program Area/Department.	
Supervises a work group. Assigns work to be done, methods to be used, and is responsible for all work performed by the group.	
Provides technical and/or functional guidance to staff and/or students	Oversees the work of a Functional Analyst. Defines work to be completed, responsible for the completion of the work. Demonstrating the technology in formal presentations, written configuration and training documentation
Instructs students and supervises various learning environments	
No supervisory responsibility	

I. Span Of Control

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

Full-Time Equivalency conversion factors for part-time staff are as follows:

- 1 sessional academic position working for a full academic year (10 months) equals 1 full time position. Based upon the assumption that sessional employees are temporary full time.
- 2 partial load academic positions working for a full academic year (10 months) equal 1 full time position.
- 3 part-time academic positions working for a full academic year (10 months) equal 1 full-time position. Based upon 3 part-time teaching assignments of 6 hours each for a total of 18 teaching hours per week.
- 2 part-time support staff positions working for a full year equal 1 full-time position. Based upon 2 part-time positions of up to 24 hours/week each and totaling 35 to 40 hours per week.

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- Part-time or contract administrators working for a minimum of 37.5 hours per week for a full year equals 1 full-time position.

FT Supervised	At the date of the JFS:
PT Supervised	
Total FTE	none

Contract for Services:

When considering a position's responsibility for "contracts for service", review the nature of the contractual arrangement 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 a "prorated credit for supervising staff" in contractual relationships where the position is required to handle the initial step(s) when staffing issues arise.

Contract for Services	Degree of Supervisory Responsibility
N/A	

J. Physical And Sensory Demands

Identify the types of physical and/or sensory demands that are required of the position. Indicate the frequency of the physical demands as well as the frequency and duration of the sensory demands.

Frequency:

- Occasional Occurs once in a while, sporadically.
- Moderate Occurs once in a while, over a period of time. May occur several times in one day, not every day.
- Considerable Occurs several times daily, usually every day, but for less than half of a work day.
- Extended Occurs on a regular basis throughout the work day, several times daily for one half to three-quarters of the work day.
- Continuous Occurs on a regular, ongoing basis during the work day for more than three-quarters of the work day.

These are periods of activity that should not be interrupted.

Physical Effort:

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.

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Activity	Physical Effort	Frequency (O) (M) (C) (E) (Cont)
Computer use, scanning computer screens, mouse manipulation		E
Standing, Walking		M
Light lifting		O

Sensory Demand:

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

Indicate the duration: Short (S) About one hour or less
 Immediate (I) More than one hour less than two hours
 Long (L) More than two hours

Activity/Sensory Demand	Duration (S) (I) (L)
Operating a computer, reading information, learning the system	L
Meeting with project team and stakeholders	L
Reviewing, analyzing and testing system data and processes	L

K. Working Conditions

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

Frequency:

Occasional Once in a while, sporadic. May occur several times daily, but not every day.
 Frequent Several times daily, almost every day.
 Continuous On a regular, ongoing basis for almost all of the work day, every day.

Environment:

- (a) 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. dirt, chemical substances, grease, extreme temperature, odors, noise, travel, verbal abuse, body fluid, etc. Indicate the activity as well as the frequency of exposure to undesirable working conditions.

Activity /Example	Frequency (O) (F) (C)	Environmental Condition
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Activity /Example	Frequency (O) (F) (C)	Environmental Condition
Regular office or remote environment Conflict resolution with vendor or internal staff	C	

Hazards:

(b) 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.

Activity /Example	Frequency (O) (F) (C)	Environmental Hazard

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