1. POSITION IDENTIFICATION

<table>
<thead>
<tr>
<th>FOR USE BY HUMAN RESOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classification &amp; Grade Approved:</td>
</tr>
<tr>
<td>Effective Date:</td>
</tr>
<tr>
<td>Approved by:</td>
</tr>
<tr>
<td>Next Review:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department Name:</th>
<th>Beedie School of Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number(s):</td>
<td>00122005</td>
</tr>
<tr>
<td>Current Position Classification:</td>
<td>Clerk, grade 7</td>
</tr>
<tr>
<td>Department Position Title:</td>
<td>Program Assistant</td>
</tr>
<tr>
<td>Evaluating Supervisor’s Title:</td>
<td>Director, Undergraduate Programs</td>
</tr>
<tr>
<td>Date Completed:</td>
<td>August 23, 2017</td>
</tr>
</tbody>
</table>

Part 1 is being completed by: [ ] Employee | [x] Evaluating Supervisor

2. POSITION SUMMARY

A summary of the major functions of the position in three or four sentences.

Provides technical, administrative, and secretarial support to the Director and Coordinator in the Beedie School of Business, Undergraduate Programs. Provides technical assistance for specific processes that are necessary for data analysis and reporting, carried out by the Director and Coordinator, such as data collection, validation and categorization. Provides administrative support, including maintaining the petty cash fund; maintaining websites; and processing purchase orders and payments for invoices related to the purchase of marketing materials, equipment and supplies. Provides secretarial assistance, such as proof reading; drafting correspondence; editing reports; and formatting tables and graphs according to departmental standards.

3. MAJOR FUNCTIONS

List the duties and responsibilities of the position in order of frequency (i.e., (D) Daily; (W) Weekly; (M) Monthly; (S) Semester)

1. Assists with the collection, processing and verification of data on a variety of issues for internal uses and for dissemination to external agencies by compiling and collating data from numerous sources; determining if data is statistically significant (e.g., by par valuing sub-groups of responses); conducting simple information system and database queries; conducting internet searches and liaising with external and internal personnel as required. Writes sections of applicable reports where analysis was completed by the incumbent. (D)

2. Assists in preparing paper-based and web-based reports and other promotional or presentation materials by drafting, categorizing, summarizing, editing and formatting texts, by creating and formatting tables, graphs or images, and by publishing on Beedie School of Business (Beedie) website(s). Arranges for design and printing, as required. (D)
3. Checks layout and formatting of departmental documents and provides assistance to ensure documents have the same look and feel. (D)

4. Proof reads reports and other documents by reading carefully and looking for typographical errors, grammatical coherency and factual accuracy to ensure that information is communicated concisely, clearly and accurately. (D)

5. Performs calculations and basic data analysis according to specific directions. Examples include using various sources such as IRP reports, SIMS, FileMaker databases, Teaching, Research and Collaboration System (TRACS), etc., to extract a subset of data and format this into easy-to-understand tables using Word, Excel or other software applications (i.e., Tableau). (D)

6. Arranges and coordinates daily meetings for the Director and/or Coordinator, as well as other meetings and events by coordinating meetings, compiling participant lists, recording replies to invitations, booking rooms, locating and compiling supporting materials and information, and making food catering, travel and accommodation arrangements as required. (D)

7. Performs shared reception duties for the department by screening and referring all in-person and telephone inquiries to appropriate staff and answering routing inquiries with respect to the Beedie’s undergraduate program activities. Directs visitors and answers inquiries; when necessary, redirects inquiries to appropriate sources. (D)

8. Acts as a resource for the undergraduate programs by: providing information regarding University and departmental guidelines; coordinating various processes to support Faculty teaching (i.e., as related to course outlines, scheduling and/or evaluations, and Teaching Assistant selection and evaluations); responding to general inquiries regarding undergraduate course offerings, course schedules, deadlines, etc.; assisting undergraduate students obtain access to printing and access cards, information on course status, etc. (D)

9. Types letters, reports, and general and confidential correspondence and maintains accurate database and spreadsheet records by: using word processing and standard office applications; proofreading and editing material; and ensuring that format, layout and data entry procedures are followed consistent with publication guidelines and office procedures. (D)

10. Provides secretarial and administrative support by coordinating undergraduate meetings and special events and arranging appointments; drafting and circulating agendas and materials; booking rooms and organizing meeting resources; recording, transcribing and distributing minutes of meetings; initiating follow-up arising from meetings; and coordinating, processing and disseminating Committee decisions to appropriate parties to support the activities of the Undergraduate Program. (W)

11. Assists the Director and/or Coordinator with preparing materials (i.e., brochures) and presentations for events using word processing and desktop publishing applications (i.e., Word, InDesign) and presentation and image-editing software (i.e., PowerPoint, Photoshop). Collaborates with Student Services and Beedie’s marketing and communications team to ensure materials fit with SFU’s and Beedie’s branding style.

12. Disseminates correspondences, reports and promotional materials by mail, web, electronic mail, internally and externally and by hand, as required. (W)

13. Designs and maintains databases and spreadsheets by entering and updating data using database applications to allow an easy retrieval of the data. (M)

14. Creates and updates tables, charts, reports, preparing news items, factoids or summaries for posting. (M)

15. Maintains the filing and record keeping systems. Creates and adapts systems for easy retrieval. Classifies and codes correspondence; establishes new files and cross checks for accuracy. Archives files and maintains accurate archive records as required. Maintains electronic files and databases. Coordinates and submits database (e.g., TRACS) feature update requests (i.e., submission via Jira). (M)
16. Conducts research of internal and external practices and policies of institutions, associations or government entities (e.g., Ministry of Advanced Education) as defined by the Director and/or Coordinator related to specific issues by identifying and contacting resource persons by telephone, email, researching published/journal articles online, and conducting literature reviews. Prepares a summary of information gathered. (M)

17. As required, assists the Director and/or Coordinator to monitor the undergraduate programs operating budget by checking requisitions, expense statements, deposits and budget transfers against debits and credits on monthly statements to ensure that transactions have been accurately recorded. Prepares purchase orders, cheque requisitions, journal vouchers, work orders. Processes invoices for payments and liaises with staff in Beedie Administration Services and SFU Financial Services on any matters requiring clarification. (M)

18. Maintains an inventory of paper and other general office and equipment and supplies, and initiates orders to replenish by monitoring stock levels. Makes special orders on request and checks invoices to ensure that requisitioned stock is received. (M)

19. Prepares statistical summaries and reports related to all undergraduate programs, courses, and activities, using database and spreadsheet applications (i.e., FileMaker, Excel) and SIMS by retrieving data; compiling information, and preparing/generating reports. Prepares the Instructional Activity Report using spreadsheet applications (i.e., Excel). (S)

20. Assists with the creation and delivery of surveys using online platforms (e.g., FluidSurveys, SFU Websurvey). Collects and compiles data from surveys and formats data using spreadsheet, database, and word processing applications (i.e., Excel, FileMaker Pro, Word) to manipulate, analyze, and summarize data. (S)

21. Assists with the creation and production of promotional materials for the undergraduate program by designing and/or upgrading the layout of program flyers, newsletters and promotional materials using desktop publishing applications (e.g., Adobe Creative Suite), and liaising with SFU Document Solutions to arrange for printing and duplication of materials to ensure accurate and timely marketing of the program to internal and external clientele. (S)

22. Develops and modifies databases and spreadsheets, including layouts and forms, for various information related to undergraduate programs, courses and activities using spreadsheet, database, and word processing applications (i.e., Excel, FileMaker Pro, Word) to manipulate, analyze, and summarize data. (S)

4. MINOR FUNCTIONS

List duties and responsibilities that occur annually and periodically throughout the year.

1. Prepares files for storage or university archives by extracting dated material from current files, storing in file boxes, labelling, dating and arranging for removal to the storage or archival location.

2. Maintains the petty cash fund by processing receipts, recording transactions, issuing cash reimbursements, preparing summary reports, and replenishing the petty cash fund.

3. Processes travel and other expense claims for the Director by collecting receipts, itemizing and calculating expenses and submitting for re-imbursement in the required format.

4. Performs other related duties and responsibilities consistent with the position title and classification, upon request.
5. LEVEL OF INDEPENDENCE
Check one box that best describes the level of independence that can be exercised within the position by a fully trained employee.

- □ a) Work is provided with specific instructions describing how and when it should be completed.
- □ b) Work is provided with general instructions. The employee makes choices about how the work will be completed within deadlines.
- □ c) Work is self-directed by the employee. The employee determines what work needs to be completed and when it should be completed to meet deadlines.
- □ d) Work is assigned on a project-by-project basis in the form of broad objectives. The employee evaluates what work needs to be completed within general time frames. Provide examples of project work:

6. TRAINING EXERCISED
If the position provides training, check each description that applies.

- □ a) Not required to provide training to other individuals.
- □ b) Explains how work is performed in his/her own position to individuals in other positions performing the same or similar work (includes training replacement employees).
- □ c) Provides one-on-one specialized training to other individuals. Considered a specialist in a particular area or field of study. Positions at this level may be designated as the resident department expert.
- □ d) Provides one-on-one training to individuals in other positions. Must have a good understanding of the work of the other positions. Positions at this level may be designated as group leaders or work leaders.
- □ e) Conducts training seminars for groups. Training seminars are normally scheduled and follow a prescribed format. May also develop or assist in the development of training seminars.

7. DIRECTION EXERCISED
Check each description that applies.

- □ a) Not required to provide direction to other individuals.
- □ b) Assigns and/or checks work of other individuals.
- □ c) Schedules, assigns, and checks work of other individuals.
- □ d) In addition to C, establishes work priorities for a unit.
- □ e) In addition to C and D, guides project teams.
8. INTERNAL AND EXTERNAL CONTACTS
List internal and external contacts (i.e., specific positions within own department, other departments, students, faculty, on/off campus vendors, etc.), the duration of each contact (i.e. less than 1 hour at a time, 1-2 hours at a time, more than 2 hours at a time), and the frequency of each contact (i.e. occasional, frequent, or continuous).

<table>
<thead>
<tr>
<th>Type of Contact</th>
<th>Duration</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Faculty, staff and students</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>External vendors</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
<tr>
<td>Other departmental staff and team members</td>
<td>&lt;1 hour</td>
<td>occasional</td>
</tr>
</tbody>
</table>

9. IMPACT OF ERRORS
Common Errors: Provide a few examples of the most common errors which normally occur in the performance of the work.
- Neglecting to order supplies in a timely manner
- Failing to catch typing and grammatical errors in drafts

Uncommon Errors: Provide a few examples of most uncommon errors which infrequently occur in the performance of the work.
- University or office policies and procedures not followed correctly

10. EFFORT
Describe concentrated periods of auditory (hearing/listening); visual (seeing); perceptual (understanding/comprehending); and physical dexterity (finger/hand movements, eye/hand coordination, lifting, carrying, pushing, pulling, reaching etc.). For each example of effort, indicate the concentrated duration (less than 1 hour at a time, 1-2 hours at a time, more than 2 hours at a time) and frequency (occasional, frequent, continuous).

<table>
<thead>
<tr>
<th>Type of Effort</th>
<th>Duration</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visual</td>
<td>1 - 2 hours</td>
<td>frequent</td>
</tr>
<tr>
<td>Perceptual</td>
<td>&lt; 1 hour</td>
<td>frequent</td>
</tr>
<tr>
<td>Manual Dexterity (keyboarding)</td>
<td>1 – 2 hours</td>
<td>frequent</td>
</tr>
<tr>
<td>Lifting, carrying (office supplies)</td>
<td>&lt; 1 hour</td>
<td>occasional</td>
</tr>
</tbody>
</table>

11. WORKING CONDITIONS
a) Describe the place(s) where work is performed such as office environment, laboratory, outside work site, etc. Also identify the number of hours (of the total hours worked per week) spent in the place(s).

<table>
<thead>
<tr>
<th>Location</th>
<th>Hours spent as a total of hours worked per week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office environment</td>
<td>35/35</td>
</tr>
</tbody>
</table>
### 11. WORKING CONDITIONS

b) Describe any uncomfortable and/or distracting conditions in the workplace(s) which an incumbent is exposed to on a regular basis and the frequency of the exposure. (e.g. interruptions, distracting noise, unpleasant odours, dust, drafts, inks, dyes, cleaning agents, toner for printers, temperature extremes, heavy dust conditions, wetness, fumes, vibrations, etc.)

<table>
<thead>
<tr>
<th>Uncomfortable Conditions</th>
<th>Frequency of Exposure (Occasional, Frequent, or Continuous)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interruptions</td>
<td>frequent</td>
</tr>
</tbody>
</table>

c) Describe any potential health or safety hazards etc. and the frequency of exposure of each hazard. (e.g. dealing with complaints and/or verbal/physical abuse; noise levels that interfere with normal speech/hearing; toxic gases or materials; dangerous chemicals, combustibles, radioactive material; repetitive arm, finger, wrist movements or other activities that may result in a physical injury; high speed, pressurized equipment; high voltage; heights above five feet; bio-hazardous wastes, body fluids, etc.)

<table>
<thead>
<tr>
<th>Potential Health or Safety Hazards</th>
<th>Frequency of Exposure (Occasional, Frequent, or Continuous)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repetitive arm, finger, wrist movements</td>
<td>frequent</td>
</tr>
</tbody>
</table>

### 12. CONTINUING EDUCATION

Check each description that applies.

- [ ] a) Does not require any continuing education.
- [x] b) Requires learning new university/department related procedures and/or methods.
- [x] c) Requires learning new procedures and/or methods acquired through reading non-university/department publications.
- [ ] d) In addition to B and C, requires registration in formal seminars, training sessions, workshops, conferences, etc.
- [ ] e) In addition to B, C, and D, requires registration in post-secondary courses (one semester/equivalent).

### 13. QUALIFICATIONS

Minimum required to satisfactorily perform the work.

Formal education qualifications: identify the highest level of formal schooling required.

High school graduation and one year of post-secondary education or formal program equivalent with courses or workplace training in statistics, word processing, spreadsheet, database applications and office procedures.

In addition to formal education, identify the certification or program of study required.

None
13. QUALIFICATIONS
Minimum required to satisfactorily perform the work.

In addition to the above qualifications, the number of years of minimum experience are:

2 Years

Check one:

☒ An equivalent combination of formal education, certificate/program of study and experience is acceptable.
☐ An equivalent combination of education, certificate/program of study and experience is not acceptable because: (please explain)

Occupational Skills: Identify skills specifically required to perform the work of the position.

- Excellent knowledge of English grammar, spelling, punctuation, filing and office routines.
- Good knowledge of standard office procedures and protocols.
- Excellent client service and interpersonal skills.
- Excellent attention to detail.
- Good analytical reasoning, problem-solving and organizational skills.
- Good communication (verbal and written) skills.
- Ability to use word processing, presentation, and database applications (e.g., Word, PowerPoint, FileMaker) and data visualization tools (e.g., Tableau) at an intermediate level.
- Ability to use spreadsheet applications (e.g., Microsoft Excel) at an advanced level (e.g., using "if" statements, v-lookup, creating pivot tables).
- Ability to use statistical software applications (e.g., SAS) at an intermediate level.
- Ability to use enterprise-level information systems (e.g., PeopleSoft, SAP or equivalent) at an intermediate level.
- Ability to compile and collate data from a variety of sources, and determine if data is statistically significant.
- Ability to perform arithmetic and percentage calculations with a high degree of accuracy.
- Ability to maintain records with a high degree of accuracy.
- Ability to handle confidential material and information with discretion.
- Ability to exercise mature judgment and initiative.
- Ability to track and monitor budgets.

Occupational Requirement(s): Identify non-skill requirements to perform the work such as ability to work shifts and/or be on-call; ability to travel periodically outside the lower mainland; have a valid driver's license; ability to lift, move or carry equipment or materials over 10 kg; etc.

- Ability to work occasional overtime to meet deadlines.
- Ability to lift, move, or carry supplies and file boxes weighing up to 12 kg.
- Ability to arrange suitable transportation for travel to work at other SFU campuses (e.g., Burnaby, Surrey).