

# LOKKEN

## ROLE EXPECTATIONS DESCRIPTION (RED)

| Position Details                  |                  | Employment Status: |                                     |
|-----------------------------------|------------------|--------------------|-------------------------------------|
| <b>Job Title:</b>                 | General Manager  | Full-time          | <input checked="" type="checkbox"/> |
| <b>Name:</b>                      |                  | Part-time          | <input type="checkbox"/>            |
| <b>Date Written:</b>              | January 10, 2000 | Temporary          | <input type="checkbox"/>            |
| <b>Date Updated:</b>              | July 24, 2007    | Contract           | <input type="checkbox"/>            |
| <b>Regular Hours Worked/Week:</b> | 37.5             | Intern/Trainee     | <input type="checkbox"/>            |
|                                   |                  | Allocation         | <input type="checkbox"/>            |

### Overall Purpose and Objective of the Role:

The General Manager (GM) represents Lokken and is responsible, as part of the management team, and in concert with the company values, to plan and oversee the management of the area including human resources, business development, operations and finance.

The GM is also responsible for ensuring that customer service expectations are met. Our customers include our learners, staff, funders, other agencies, employers, and the rest of the company.

The GM ensures that: annual plans are developed and implemented; variances from the annual plan targets are reconciled and adjustments are implemented at least monthly; and administration of corporate business meets company standards.

### Major Responsibilities of the Role:

- 1. Corporate Values** - As leader of the management team, and in accordance with company values, principles and standards, to plan and manage services that contribute to the health and growth of the organization by maximizing the opportunity for learners to make a successful transition to employment.
- 2. Human Resources Management** - To prepare and implement an **annual corporate human resource plan** to be used to manage and develop staff to ensure stability and that the company has the human resources required to meet its goals. All Human Resources administration will be done in compliance with company standards as set out in the *Staff Orientation Handbook* and the *Personnel Practices Handbook*.
- 3. Business Development** – To develop and implement a **corporate business development plan** that meets the revenue and market positioning needs of the company. Prepare an annual marketing plan as per *Standard Operating Procedures*. The GM is responsible for developing and maintaining effective relationships with funders, industry groups and other service providers to ensure corporate awareness as the basis for planning, market analysis, marketing, advertising and recruitment. The GM maximizes the potential for the company to meet its revenue targets.
- 4. Operations Management** - To prepare an **annual corporate operating plan** which considers service, human resources and business development requirements and is used as a guide for corporate management and forward planning. The plan will also be used to audit and manage

service delivery to ensure compliance with contract terms and successful achievement of program standards and contracted outcomes. All administration will be done in compliance with company standards as set out in the *Standard Operating Procedures* manuals and as may be required under the terms and conditions of specific contracts.

5. **Financial Management** – To prepare and implement a **corporate financial plan** and budget which in consideration of human resources, business development and operational requirements establishes and respects realistic achievable corporate financial goals. The plan will also be used as a tool to monitor ongoing financial performance and identify changes to be implemented to ensure fiscal stability and the achievement of fiscal targets. To ensure that all financial transactions are completed in accordance with *Standard Operating Procedures*.

**Minimum Position Entry Requirements:**

1. Postgraduate education in Business Administration (MBA), Business Management (MBM), or equivalent.
2. Demonstrated experience and competence in business administration / management.
3. Computer literacy in MS Office, AccPac, Simply Accounting or other accounting software
4. Demonstrated communication, planning and leadership skills.

| <b>ROLE DUTY DESCRIPTION</b>  | <b>RATE</b> | <b>% OF TIME</b> | <b>PERFORMANCE STANDARD</b>   |
|---|-------------|------------------|---|
| <b>1. Corporate Values</b>  | 1           | N/A              | <b>1. Corporate Values</b>  |
| <i>1.1. Adhere to all company principles in the Commitment to People, Maximum Feasible Quality, Integrity, and Personal Financial Responsibility values</i>     |             |                  | <i>1.1. Demonstrate Commitment to People, Maximum Feasible Quality, Integrity, and Personal Financial Responsibility.</i> |
| <b>2. Communications</b>  | 1           | N/A              | <b>2. Communications</b>  |
| <i>2.1. Communicate as a leader of the management team.</i>   |             |                  | <i>2.1. Demonstrate effective management team communications.</i>   |
| <i>2.1.1. Prepare and share a weekly work plan/schedule with corporate stakeholders.</i>  |             |                  | <i>2.1.1. Work plans are available online.</i>  |
| <i>2.1.2. Comply with all company communication standards to ensure that the information flow is adequate to ensure timely corporate stakeholder awareness.</i> |             |                  | <i>2.1.2. Stakeholders are always aware of significant corporate developments. There are no surprises.</i>                |
| <i>2.1.3. Ensure that the management team remains informed of corporate developments that may be useful across operational areas.</i>                           |             |                  | <i>2.1.3. Attend and lead Area manager meetings. Ensure all resources, proposals and ideas are shared.</i>                |
| <i>2.1.4. Ensure completion of projects assigned members of the management team.</i>  |             |                  | <i>2.1.4. Attend and lead management team meetings.</i>   |
|   |             |                  | <i>2.1.4.1. All tasks that may be, from time to time, assigned to the management committee are completed on time.</i>     |
| <i>2.1.5. Lead in the annual planning process.</i>  |             |                  | <i>2.1.5. Annual planning process completed according to corporate standards.</i>   |

| <b>ROLE DUTY DESCRIPTION</b>  | <b>RATE</b> | <b>% OF TIME</b> | <b>PERFORMANCE STANDARD</b>   |
|---|-------------|------------------|---|
| 2.1.6. Develop an annual Corporate Plan.  |             |                  | 2.1.6. Demonstrate development of annual plan.  |
| 2.1.7. Lead in the annual planning session in June.   |             |                  | 2.1.7. Prepare for and lead the June Strategic Planning session.  |
|   |             |                  | 2.1.7.1. Annual plan developed and delivered to the Chief Executive Officer (CEO):<br><b>Draft:</b> October 31<br><b>Final:</b> November 30   |
| <b>3. Human Resources:</b>  | 1           | 35               | <b>3. Human Resources:</b>  |
| 3.1. Ensure effective human resource management including:  |             |                  | 3.1. Demonstrate effective Human Resource (HR) management by realizing planned Business Development (BD), Operations (OP) and Financial Plan (FIN) targets.                               |
| 3.1.1. Prepare and submit an annual Human Resource Development Plan.  |             |                  | 3.1.1. The annual Human Resources Development Plan is developed and delivered to the CEO:<br><b>Draft:</b> October 31<br><b>Final:</b> November 30  |
| 3.1.2. Manage human resources to meet corporate commitments.  |             |                  | 3.1.2. The company recruits, orients, trains and supports sufficient human resource to meet BD, OP and FIN targets and standards.   |
| 3.1.3. Manage human resource administration to meet company standards.  |             |                  | 3.1.3. All HR documentation is completed accurately, on time and completely according to company standards. All HR administration issues are resolved within 30 days of being identified. |
| 3.1.4. Supervise and support area managers to ensure that morale remains high and staff meet service targets and comply with company standards.                             |             |                  | 3.1.4. Participate in regularly scheduled area meetings to ensure area HR performance.  |
|   |             |                  | 3.1.4.1. Supervise timely completion of staff performance reviews.  |
|   |             |                  | 3.1.4.2. Corporate human resource management meets company standards as well as BD, OP and FIN service targets and standards.   |
| 3.1.5. Manage human resource performance to ensure that concerns are documented and communicated early and performance improvement plans are implemented to resolve issues. |             |                  | 3.1.5 HR performance management meets corporate standards.  |
| <b>4. Business Development:</b>   | 1           | 20               | <b>4. Business Development:</b>   |
| 4.1. Confirm initial area feasibility analysis and record in the corporate Business Development Plan.   |             |                  | 4.1. Corporate Business Development Plan is comprehensive and complete.   |

| <b>ROLE DUTY DESCRIPTION</b>  | <b>RATE</b> | <b>% OF TIME</b> | <b>PERFORMANCE STANDARD</b>   |
|---|-------------|------------------|---|
| 4.1.1. Confirm customer short and medium term needs and wants before they are advertised.   |             |                  | 4.1.1. The company is aware of developments in time to participate, with the relevant funder, in planning for how to meet them.                   |
|   |             |                  | 4.1.1.1. Confirm an understanding of relevant RFP's before they are written/released  |
| 4.1.2. Prepare and submit an annual corporate Business Development Plan.  |             |                  | 4.1.2. Corporate Business Development Plan is developed and delivered to the CEO:<br><b>Draft:</b> October 31<br><b>Final:</b> November 30        |
| 4.1.3. Implement the Business Development Plan to achieve annual corporate revenue targets.   |             |                  | 4.1.3. Revenue targets are met.   |
| <b>5. Operations:</b>   | 1           | 25               | <b>5. Operations:</b>   |
| 5.1. Using Lokken's Learner Management System (LMS) ensure that all service obligations are met within contract guidelines and company standards including: |             |                  | 5.1. Operational Management meets contract guidelines and company standards.  |
| 5.1.1. Prepare and submit an annual Corporate Operations Plan.  |             |                  | 5.1.1. The Corporate Operations Plan is delivered to the CEO:<br><b>Draft:</b> October 31<br><b>Final:</b> November 30                            |
| 5.1.2. Audit service delivery to ensure all services meet contractual obligations and Adult Education standards.  |             |                  | 5.1.2. All program services delivered and follow up results meet contracted and planned targets.  |
| 5.1.3. Ensure stakeholders are satisfied with service delivery.   |             |                  | 5.1.3. Service evaluations show positive responses that are consistent with stakeholders' expectations.   |
| 5.1.4. Ensure that all administration meets company standards as per SOP.   |             |                  | 5.1.4. All reports, documents, etc are accurate, on time and complete. All administrative issues are resolved within 60 days of being identified. |
| <b>6. Finance:</b>  | 1           | 20               | <b>6. Finance:</b>  |
| 6.1. Ensure are financial administration meets company standards including:   |             |                  | 6.1. Demonstrate sound financial management in accordance with company standards.   |
| 6.1.1. Prepare and submit a corporate Financial Plan.   |             |                  | 6.1.1. Financial Plan presented to the CEO:<br><b>Draft:</b> October 31<br><b>Final:</b> November 30  |
| 6.1.2. Prepare and submit monthly updates to the annual plan.   |             |                  | 6.1.2. Monthly plan updates are received in the required format by the 10th day of the first month of each quarter.                               |
| 6.1.3. Manage the corporate financial plan to achieve annual targets.   |             |                  | 6.1.3. The company meets annual financial goals.  |

| ROLE DUTY DESCRIPTION  | RATE | % OF TIME | PERFORMANCE STANDARD  |
|--|------|-----------|---|
|  |      |           | 6.1.3.1. Monthly financial reports are reviewed and all material variances for the period are investigated and adjusted.                          |
|  |      |           | 6.1.3.2. Expenses are approved in consideration of budget.  |
|  |      |           | 6.1.3.3. Capitol expenditures are incurred as planned.  |
| 6.1.4. Manage corporate financial administration to meet company standards as per SOP. |      |           | 6.1.4. All administrative issues are resolved within 60 days of being identified including forms, reports, deadlines and communication standards. |
| Total % of Time  |      | 100       |   |

| Performance Review Schedule:   |   |
|--|---|
| <b>Initial:</b>  | (Three months)                              |
| <b>Probation:</b>  | (Six Months)                                |
| <b>Ongoing:</b>  | Each September Commencing in September 2010 |
| <b>Professional Development Plan:</b>  | To be developed in September 2010.          |
| <p>I hereby acknowledge that I have read and understand the performance expectations as outlined above and hereby certify that I will abide by these expectations.</p> |   |
| Date   | Employee                                    |

| Professional Development Plan |                        |                                 |      |
|-------------------------------|------------------------|---------------------------------|------|
| Development Objective:        | Strategy / Action Plan | Status                          | Date |
|                               |                        | Double Click to indicate status |      |
|                               |                        | Double Click to indicate status |      |
|                               |                        | Double Click to indicate status |      |
|                               |                        | Double Click to indicate status |      |