

Working Title Director, Tax Policy		Name	
Position Number	Reports to Position No., Class & Level	Division, Branch/Unit	Ministry Treasury Board and Finance
Present Classification		Requested Classification	Levels to Deputy Minister (Not including incumbent level)
Dept ID	Program Code	Project Code (if applicable)	

POSITION SUMMARY: Briefly describe the main purpose of the position, and why it exists for the most part (See PP [Slides 28-32](#)).

Reporting to the Executive Director, Tax Policy, the Senior Manager position provides specialist support for branch and divisional priorities, in areas such legal/legislation and complex tax issues. The Senior Manager position requires a high level of knowledge and experience regarding both the Alberta and federal tax systems and legislation.

The Senior Manager provides expert advice and makes recommendations to senior management, the Deputy Minister and Minister of Treasury Board and Finance on matters relating to Alberta's tax policy. These recommendations are required as input into Treasury Board and Cabinet decisions. Accurate advice and sound recommendations are critical given that the policy decisions could affect Albertans, Alberta businesses, the government's fiscal position and Alberta's tax competitiveness.

Work is both proactive and reactive. The Senior Manager must monitor developments related to taxation and other public policy issues and conduct original research in order to anticipate and respond quickly to inquiries from senior management, elected officials, the media, industry and the general public. The Senior Manager also works with a variety of government departments to develop policy and to ensure that Alberta's policies are correctly expressed in legislation and administrative practice.

SPECIFIC ACCOUNTABILITIES: List the most important end results or outcomes (not duties) of the position and how they are achieved. Each end result shows what the position is accountable for, within what framework and what the added value is. Normally a position has 4-6 core end results. For each end result approximately 4-6 major activities should be described (See PP [Slides 20-27](#)).

1. Provides specialist support to the Tax Policy branch and Economics and Fiscal Policy division

- Acts as the subject matter expert, leads major projects and provides support for branch and divisional priorities, in areas such as legislation/legal matters or other complex tax issues.
- Is the main point of contact for the branch with relevant federal and provincial ministries (e.g., Canada Revenue Agency, Tax and Revenue Administration, Legislative Counsel Office).
- Supervising, mentoring and training of more junior staff involves educating/advising/assisting on assignments or tax questions as needed.

2. Decision-makers (Senior Management, Minister, Treasury Board and Cabinet) are provided accurate information, analysis, and recommendations on which to base tax related fiscal decisions and develop the fiscal plan.

- Researches and analyzes tax issues relevant to Alberta and communicates the results to senior decision makers.
- As required, attends Treasury Board and reports, clarifies and advises on highly confidential tax policy decisions (e.g. some tax initiatives may impact financial markets, where information leaks could be subject to criminal investigations).

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- As required, attends Minister/Deputy Minister Meetings, providing further information, clarification and advice on taxation issues.
- As required, attends Legislative Review Committee to summarize legislative proposals for Committee members.
- Monitor public policy developments in Alberta and other jurisdictions.
- Identifies and communicates implications of proposed tax measures to senior decision-makers.

3. Communications specific to taxation, both internal and external to government, are timely, accurate and contain the intended message. This includes official government communications, as well as letters and direct contact with professionals, special interest groups, and individuals from the public.

- Provides input in the drafting of Treasury Board and Finance press releases on taxation issues.
- Provide input to Treasury Board and Finance communications indicating the Alberta government's position on taxation issues raised in the media.
- Prepares written responses for the Minister to other Ministers, tax professionals, special interest groups, and Albertans.
- Communicates Alberta policies and changes directly to federal and other provincial government officials, tax professionals, stakeholder groups, and Albertans. These communications are often in response to specific questions and are technical in nature, requiring expertise in underlying federal and provincial legislation. These communications must often be guarded or censored in order to protect the confidentiality of potential tax changes.

4. Represent Department on interdepartmental or intergovernmental working groups or committees

- Participates in policy development through interdepartmental working groups and ADM-level steering committees on a wide variety of programs.
- Provides information to other departments on federal and provincial tax systems and current provincial tax policy.
- Keeps senior decision-makers informed of relevant developments and proposed tax measures and coordinates with internal decision-making processes when required.
- Attends meetings between senior federal, provincial and territorial officials and presents policy positions on behalf of the Government of Alberta.
- Maintains contacts with officials in federal and provincial governments.

KNOWLEDGE/EXPERIENCE: Include a list of the most important knowledge factors, including knowledge about practical procedures, specialized techniques etc. not only diplomas and degrees. Detail specific training if there is an occupational certification/registration requirement for the position. Specify the type of experience required for the position (See PP [Slides 33-37](#)).

- An accounting designation, a Bachelor of Law, or Graduate degree in Economics, Public Administration, Business, Finance, or related discipline.
- Specialized knowledge of federal and provincial tax legislation.
- Experience in applied and theoretical taxation policy.
- An ability to meet deadlines in a highly diverse and complex environment and across multiple subject matters.
- Strong interpersonal, communications and negotiation skills.

The following are preferred:

- Completion of the CICA/CPA in-depth tax course.
- Knowledge of tax administration.
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LEADERSHIP AND BUSINESS KNOW-HOW: Specify the level of coordination, organization and leadership required to produce the results expected of the position. Provide recent examples (See PP [Slides 38-40](#)).

KNOWLEDGE/EXPERIENCE: Include a list of the most important knowledge factors, including knowledge about practical procedures, specialized techniques etc. not only diplomas and degrees. Detail specific training if there is an occupational certification/registration requirement for the position. Specify the type of experience required for the position (See PP [Slides 33-37](#)).

Position is a subject matter expert in the field of taxation and is called upon to analyze tax developments and policy options and provide advice and guidance to staff within the unit, the department and other ministries.

Leadership skills of foresight, planning, and coordinating, together with strong interpersonal skills in communications (verbal, non-verbal and written), negotiation and conflict resolution are required to take a project from inception to a finished result within the required timeframe.

This position provides mentoring, training and assistance as required and may supervise other staff members. This includes work by staff members to support modeling capacity, legislation or policy development, and supervision of specific projects for the Executive Director.

Leadership is exercised by

- Developing and maintaining partnerships and working relationships with a wide variety of senior level internal and external stakeholders; consulting with them to develop and recommend changes at a strategic level, and identify and share with them emerging issues and trends.
- Reviewing and evaluating the extent of fairness and competitiveness of tax policy and potential risk across the tax programs.
- Independently initiating research relating to tax, policy or program risk issues.
- Providing direction and mentorship to tax policy staff and review work assignments and projects
- Overseeing the performance of direct reports
- Making recommendations and providing advice on implications of tax policy when representing the Ministry on various provincial/federal / international committees.

PROBLEM SOLVING: Describe difficult or challenging situations the position is typically expected to solve and the assistance available (See PP [Slides 41-43](#)).

The incumbent is responsible for finding solutions to tax policy problems that are within Alberta's powers to implement.

This requires in-depth and informal reviews of the tax system as changes are initiated in the tax environment. Impact, cost and incidence analysis are completed with respect to the effect tax initiatives have on the economy, taxpayers and government revenues. The position may also be required to develop legislation for problems unique to Alberta. In these situations, the incumbent must ensure that the legislation accomplishes the government goal while limiting unintended consequences.

The problems faced are unique and there are no established procedures for resolving the issues. Each issue must be approached differently and resolved with very little support. The incumbent may reference past tax practices and policy, precedents in other jurisdictions, academic literature and statistical modeling techniques. This type of problem solving requires a high degree of independent thinking, creativity, deep knowledge of the subject area and broad experience.

The position's outputs potentially affect the government's general revenue stream and Alberta taxpayers. The impact is mostly external to the department, but policy development affects internal functioning within Treasury Board and Finance as well as other departments.

Attention to detail is essential as is the ability to foresee possible stakeholder responses, including possible tax planning impacts as mistakes can embarrass the government, require legislative amendment to fix, and result in lost tax revenue.

RELATIONSHIPS/CONTACTS: Identify internal and/or external clients, partners and stakeholders with whom your position has the most influence and indicate the frequency, purpose and nature of the contact (i.e. how they are affected by recommendations, decision-making and action(s) taken) (See PP [Slides 44-46](#)).

Clients	Frequency	Nature and Purpose of Contact
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<p>Internal</p> <ul style="list-style-type: none"> • Tax and Revenue Administration • Economics and Fiscal Policy/Budget Development and Reporting • Communications • ADM, Economics and Fiscal Policy • Deputy, TBF • Minister, TBF 	<ul style="list-style-type: none"> • Occasional • Occasional • Frequent • Frequent • As required • As required 	<ul style="list-style-type: none"> • Discussion of policy, legislative or administrative issues • Budget implications of tax policy options/proposals • Help frame messaging around tax issues - making technical issues clear and simple to understand • Discussion of policy, legislative or administrative issues • Discussion of policy, legislative or administrative issues • Discussion of policy, legislative or administrative issues
<p>External</p> <ul style="list-style-type: none"> • Treasury Board • Cabinet Policy Committee • External Ministry Clients • Stakeholder Groups, Tax Professionals, Public 	<ul style="list-style-type: none"> • As required • As required • As required • As required 	<ul style="list-style-type: none"> • Advice / Recommendations / Information • Advice / Recommendations / Information • Provide Advice, recommendations, comments, technical information • Provide Advice, recommendations, comments, technical information and answer questions, facilitate problem resolution.

IMPACT AND MAGNITUDE OF JOB (SCOPE): Identify how the position directly affects results, and the extent to which stakeholders are affected by the outputs. Provide recent examples (See PP [Slides 47-49](#)).

Taxes affect all Albertans, generating \$18 billion in annual provincial revenue. Advice and recommendations provided by this position have a significant impact on Alberta taxpayers and the government's fiscal position. Because tax knowledge and experience is limited within the Alberta Public Service, the expertise of the position is an important tool in the government's ability to evaluate the implications of tax initiatives. Mistakes could lead to bad policy and could negatively impact taxpayer and/or government revenues and the government's reputation.

CHANGES SINCE LAST REVIEW: What significant changes have occurred in your job, from the last review (See PP [Slides 50-51](#)).

This position provides specialized support to the branch and division. This specific skills and expertise are highly technical and specialized and difficult to attract to government. As a result, it is fundamental to develop the skills and expertise within. The change and increased responsibilities being added support succession planning in the division and will help ensure that Tax Policy continues to have the capacity to support the government. If the government had to obtain this support elsewhere, it would be costly and less responsive.

COMPARABLE POSITIONS: List comparable GoA benchmarks (See PP [Slide 52](#)).

ORGANIZATION CHART: A current organization chart that includes supervisor, peers and staff MUST be attached. Include whether employee is permanent, wage, temporary or contract and indicate position numbers (See PP [Slide 53](#)).

Signatures

The signatures below indicate that the manager (incumbent) and division director/ADM have read, discussed and agreed that the information accurately reflects the work assigned (See PP [Slide 54](#)).

Manager

_____	_____	_____
Name	Signature	Date

**Division
Director/ADM**

_____	_____	_____
Name	Signature	Date

This information is being collected under the authority of Section 10 of the Public Service Act and will be used to allocate positions within a classification plan and to manage the Alberta government human resources program. If you have any questions about the collection of this information, contact the Classification Manager, 6th Floor, Peace Hills Trust Tower, 10011 - 109 Street, Edmonton, Alberta, T5J 3S8, phone 408-8445 or contact your Ministry Human Resource Office.