

Update

Ministry

Treasury Board and Finance

Describe: Basic Job Details

Position

Position ID

[Redacted]

Position Name (30 characters)

Group Lead, Accounts

Current Class

Finance 4

Job Focus

Operations/Program

Supervisory Level

01 - Yes Supervisory

Cost Centre

Program Code: (enter if required)

[Redacted]

Employee

Employee Name (or Vacant)

[Redacted]

Organizational Structure

Division, Branch/Unit

TRA, SCS, Tax and Revenue Reporting

Current organizational chart attached?

Supervisor's Position ID

[Redacted]

Supervisor's Position Name (30 characters)

SM, Tax and Revenue Reporting

Supervisor's Current Class

[Redacted]

Design: Identify Job Duties and Value

Changes Since Last Reviewed

Date yyyy-mm-dd

2022-08-26

Responsibilities Added:

No changes since last review

Responsibilities Removed:

No changes since last review

Job Purpose and Organizational Context

Why the job exists:

Working in a team environment with the Senior Manager this position performs a leadership role in facilitating the daily administration and operations of the tax and revenue reporting group. The Group Lead facilitates communication of group activities, performance measurement, and process recommendations within the group and to management, and assists in maintaining the capability of the

group and measuring the capacity to meet targets. This position supervises tax administration processes in accordance with legislation, policies and procedures resulting in fair and equitable treatment for clients. The Group Lead plays a key role in staff development and performance management activities to ensure a high caliber of service is delivered to clients and that the group is able to respond to changing needs.

Responsibilities

Job outcomes (4-6 core results), and for each outcome, 4-6 corresponding activities:

1. Coordinates the preparation of quarterly and annual financial statements including required analysis, reports and schedules specializing in tax and revenue accounting standards to ensure effective and accurate divisional reporting.

- Establishes and manages timely, consistent, and accurate reporting of financial information to meet operations requirements.
- Coordinates audit activities and ensures completed within prescribed time-lines.
- Provides advice, leadership, and draft responses on complex issues on behalf of senior management.
- Examines analysis and interprets complex financial data and makes recommendations for improvements to enhance the dependability of financial reporting.
- Designs systems and processes required to support financial reporting requirements.

2. Leads, develops, and supervises staff

- Assists in the planning, operations, reporting and control of the processes assigned to the group.
- Supervises group staff (approve vacations, manage overtime, etc.)
- Provides first level of problem resolution for the group.
- Identifies career plans and assists in creating and achieving learning and development plans for direct reports.
- Assists in profiling positions and working to enhance on-going skill development of staff to meet branch requirements.
- Coaches and mentors staff including facilitating and providing training/ development (both technical and non-technical) to group members.
- Encourages and demonstrates teamwork principles within the group.
- Participates in new employee orientation, commencement and departure.
- Provides input on accomplishments to group's business plans.
- As required, liaise communications with other group leads and managers across TRA to maintain consistency in dealings with staff.

3. Designs systems and processes required to support specialized tax and revenue financial reporting requirements.

- Oversees daily administration of all accounting related to tax and revenue programs and processes in accordance with relevant federal and provincial legislation and TRA policies and procedures.
- Assists group in setting, monitoring and achieving production targets; assists the group with respect to calculating performance measures as required by the ministry.
- Ensure preparation of monthly, weekly, quarterly reports to management
- Ensures that year-end work plan allows the unit to meet TBF and TRA targets.
- Participates in resource planning and allocation within the group and may participate in the hiring process.
- Participate in system development (raising tickets, defining requirements, testing, etc.) as required.
- Approves system access requests, as required.
- Manages process risk in accordance with identified program risks and ensures functional consistency across processing groups.
- Participates in gathering information to response to Action Requests.

4. Performance management

- Work with group members to establish individual and group targets which carry over to individual performance contracts and evaluations.
- Completes performance agreements for direct reports including conducting regular reviews.
- Reviews all performance agreements and learning plans for delegated staff.
- Work with group to establish performance targets and statistical reporting.

5. Client service and innovation

- Acts as first level escalation point for problems with external clients and stakeholders.
- Recommends changes to processing systems to meet taxpayer demands, improve service, keep compliance costs low, and to implement legislative changes.
- Advises staff on existing policies, procedures, legislation and regulations and their related amendments.
- Ensures functional consistency across process groups.

Problem Solving

Typical problems solved:

The Group Lead is responsible for providing expert professional advice and guidance in a diverse and complex business environment. It is most often guided by various provincial legislation, GOA financial policies and procedures, Public Sector Accounting Standards, Tax and Revenue Administrative policies and procedures in determining financial solution and appropriate course of action for the division. The Group Lead is often required to review and improve internal financial procedures and guidelines to allow improvements in the overall division.

The position guides staff in processing activities who work with some of the following diverse legislation and programs:

- Alberta Corporate Income Tax Act
- Alberta Fuel Tax Act
- Alberta Tobacco Tax Act
- Financial Administration Act
- Unclaimed Property and Vested Property Act

There is complexity in the process required to extract data from different sources and databases ensuring accuracy and timeliness of the information.

Must show flexibility between operational needs and legislative requirements while still adhering to Public Sector Accounting Standards.

Uses sound judgment in determining how to apply legislation and provides processing advice to group members. Leads group on an ongoing and project basis as appropriate. May be assigned to projects within the group or in collaboration with other areas of TRA as required. The Group Lead must work within the authority delegated to the positions by Deputy Minister authority in accordance with the Government Organization Act. The Group Lead may exercise expenditure officer authority with respect to program refunds and transfers, as authorized under the Financial Administration Act and Delegation of Authority document.

Types of guidance available for problem solving:

The Group Lead will have latitude to work within a broadly defined environment with defined objectives and principles. The positions will identify, define and analyze alternative courses of action using multiple sources of legislation, Public Sector Accounting Standards, and their own subject matter expertise.

Direct or indirect impacts of decisions:

Decisions made by the Group Lead will impact the scope, approach, complexity and feasibility of tax and revenue reporting and other initiatives executed by the team. Stakeholders affected will vary depending on the project/initiative.

Key Relationships

Major stakeholders and purpose of interactions:

This position will interact daily with the processing group to lead staff through its processing function and achieve its performance and production targets. The Group Lead will interact regularly with staff to monitor and manage performance, establish and carry out learning and development plans.

The Group Lead will provide regular updates to the Senior Manager on strategies around production, and learning and development activities.

The Group Lead will interact weekly/monthly on system development projects, updates to forms and in the maintenance of IT systems.

The Group Lead will work with tax services monthly on technical interpretations, objection and appeals files, and updates to publications and with Audit Branch as need to coordinate audit reassessments, raise audit leads, and to provide information to audit files across all programs.

The Group Lead will have contact with taxpayers and claimants to obtain information and to resolve issues referred by staff.

The Group Lead will have contact with Service Alberta and Red Tape Reduction, other areas of TBF, and other GOA departments with respect to the financial activities performed by the unit.

The Group Lead will have contact with the Auditor General as they review the departments' financial statements, and during the course of the annual audit of TRA processes and transactions.

Required Education, Experience and Technical Competencies

Education Level	Focus/Major	2nd Major/Minor if applicable	Designation
Bachelor's Degree (4 year)	Business		CPA/CA/CMA/CGA

If other, specify:

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Job-specific experience, technical competencies, certification and/or training:

A professional accounting designation (CPA or legacy designation CA, CMA, CGA) is required supplemented and supplemented through related progressively responsible experience. Strong communication (written and verbal) and analytical skills are essential. Project and team management skills are required along with a good verbal knowledge of the applicable provincial and federal legislation/regulations and GOA policies for tax administration. Knowledge of processing systems and rules and an ability to interpret and apply legislation is required.

Also important are interpersonal, organizational, and problem solving skills, customer/client focus, computer skills, and knowledge of system development for large complex databases.

Behavioral Competencies

Pick 4-5 representative behavioral competencies and their level.

Competency	Level					Level Definition	Examples of how this level best represents the job
	A	B	C	D	E		
Systems Thinking	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<p>Takes a long-term view towards organization's objectives and how to achieve them:</p> <ul style="list-style-type: none"> • Takes holistic long-term view of challenges and opportunities • Anticipates outcomes and potential impacts, seeks stakeholder perspectives • Works towards actions and plans aligned with APS values • Works with others to identify areas for collaboration 	<p>1) When proposing system changes the Group Lead considers impacts on multiple programs and potential for unintended consequences</p> <p>2) Group Lead considers efficiencies when assigning work to staff and combining related duties</p>
Creative Problem Solving	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Engages the community and resources at hand to	1) Analyzes different approaches to fix a

		<p>address issues:</p> <ul style="list-style-type: none"> • Engages perspective to seek root causes • Finds ways to improve complex systems • Employs resources from other areas to solve problems • Engages others and encourages debate and idea generation to solve problems while addressing risks 	<p>problem and considers pros and cons prior to making a recommendation</p> <p>2) Leverages other system resources and applications to increase solution resilience and efficiency</p>
Build Collaborative Environments	○ ○ ● ○ ○	<p>Collaborates across functional areas and proactively addresses conflict:</p> <ul style="list-style-type: none"> • Encourages broad thinking on projects, and works to eliminate barriers to progress • Facilitates communication and collaboration • Anticipates and reduces conflict at the outset • Credits others and gets talent recognized • Promotes collaboration and commitment 	<p>1) Seeks input from other team members and staff with proficiency in a variety of areas to ensure wholesome resolution of challenges</p> <p>2) Fosters discussion among staff and other team members to ensure their perspectives are heard and incorporated in ultimate solution as appropriate</p>
Agility	○ ○ ○ ● ○	<p>Proactively incorporates change into processes:</p> <ul style="list-style-type: none"> • Creates opportunities for improvement • Is aware of and adapts to changing priorities • Remains objective under pressure and supports others to manage their emotions • Proactively explains impact of change on roles, and integrates change in existing work • Readily adapts plans and practices 	<p>1) Looks for opportunities while performing work to find efficiencies and propose related system and duty design changes</p> <p>2) Coaches and provides support to team members and staff to adapt to changes in their duties and effectively implement changes</p>
Drive for Results	○ ○ ● ○ ○	<p>Takes and delegates responsibility for outcomes:</p> <ul style="list-style-type: none"> • Uses variety of resources to monitor own performance standards • Acknowledges even indirect responsibility • Commits to what is 	<p>1) Calendar self-management and ability to track progress and deliver on multiple deliverables by deadlines</p> <p>2) Pivots between duties throughout the day to respond to emergent and</p>

		good for Albertans even if not immediately accepted • Reaches goals consistent with APS direction	dynamically changing situations
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Benchmarks

List 1-2 potential comparable Government of Alberta: [Benchmark](#)

024FX06 - Senior Commodity Tax Officer
024FN15 - Senior Financial Analyst

Assign

The signatures below indicate that all parties have read and agree that the job description accurately reflects the work assigned and required in the organization.

