

Working Title <b>Senior Budget Officer</b>		Name	[REDACTED]
Position Number	Reports to Position No., Class & Level	Division, Branch/Unit	Ministry
[REDACTED]	[REDACTED]	<b>Financial Services Division Financial Services Branch Financial Planning</b>	Public Security and Emergency Services
Present Class Budget Officer 3		Requested Class	

[REDACTED]

**PURPOSE:** Give a brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization (see Non-Management Job Description Writing Guide [Pages 7-8](#)).

The Senior Budget Officer plays a key role in a comprehensive range of budget management and fiscal analysis. The position provides professional, technical, analytical, and consultative services on financial matters to Ministry staff, senior management, and external clients.

The Senior Budget Officer will provide leadership and support to the Financial Planning unit to fulfill Ministry accountability responsibilities under the *Financial Administration Act*, the *Government Organization Act*, and the *Results Based Budgeting Act* by:

- Developing processes to prepare the Ministry's annual budget submission to Treasury Board and finalization of the Ministry's Main Estimates, including the Minister's briefing package and Minister's key budget messages required for the Committee of Supply debate.
- Providing analysis and interpretation of program area budget and forecast submissions and recommendations for the ADM of Corporate Services and Executive Team.
- Working with program areas and staff in other Ministries to improve partnerships and ensure accurate updates and financial reports are prepared regarding Ministry projects, cross-ministry initiatives, and other correspondence as required by the Minister and Deputy Minister.
- Support the coordination and implementation of Results Based Budgeting and ensuring the Ministry is in compliance with the legislation and Treasury Board processes, instructions, and decisions.

Reporting to the Manager, Financial Planning, this position performs all work within the parameters of relevant legislation, policies, guidelines, business practices, and Generally Accepted Accounting Principles (GAAP). The position also facilitates and fosters an effective, efficient financial team environment and will report to the Director of Financial Planning on associated duties.

This position also assists with the analysis of financial results in the GOA's Annual and Quarterly Fiscal Update publications and the Ministry Main Estimates and Annual Report, including financial variance analysis and recommendations.

The Senior Budget Officer is relied on to provide professional advice, guidance, and consultation relating to budgets, forecasts, financial and accounting policies, regulations, and procedures to support senior management decision-making and facilitate achievement of Ministry business plan goals. This position also contributes to continual improvement by:

- Analyzing issues;
- Streamlining activities;
- Developing procedures and presentations to enhance financial management reporting and budgeting to the Senior Financial Officer and Executive Team;
- Explaining instructions, guidelines and processes to Ministry representatives; and
- Preparing training initiatives for department staff regarding budget and forecast processes, procedures and policies.

**RESPONSIBILITIES AND ACTIVITIES:** The purpose of the job can be broken down in different responsibilities and end results. Each end result shows what the job is accountable for, within what framework and what the added value is. Normally a job has 4-8 core end results. For each end result, approximately 3-6 activities should be described (see Writing Guide [Pages 9-10](#)).

1. Provides leadership and coordination to staff in the development of annual three-year Budgets, ensuring compliance with relevant legislation, regulations, Treasury Board directives and policies and accountability frameworks, including duties associated with Results Based Budgeting process.

**Activities:**

- Prepares financial information and variance analyses for Ministry Executive Committee, including identification of major cost pressures, funding options and overall opportunities and risks facing the Ministry. Support the preparation of Budget submission to Treasury Board based on Executive Committee decisions.
  - Compiles and consolidates Ministry's annual expense and revenue budgets and three-year fiscal targets, including briefing materials and presentations for use by the Minister and Deputy Minister at Cabinet, Standing Policy Committee, Treasury Board, and Committee of Supply.
  - Communicate, clarify, and advise staff on budget targets issued by Treasury Board and coordinate preparation of revenue, program expense and capital investment budgets and cash flow reports.
  - Prepare Ministerial correspondence to Treasury Board and Finance when submitting Budget and Quarterly Update information and funding requests and supporting the Communications branch in ensuring accurate presentation of budget and forecast briefings for legislative sessions and committees.
  - Compile information for Results Based Budget submissions to Treasury Board, reviewing to ensure completeness, conformance to guidelines, incorporation of Ministerial direction, and appropriateness of programs and funding.
  - Prepare short and long-term fiscal analysis and briefing materials on major issues and budget scenarios to reflect budget adjustments and develop recommendations for review and approval of senior management.
  - Support development of the three-year business plan to ensure it incorporates the strategic direction of approved budget targets.
  - Compiles and oversees the preparation of financial briefing materials and reports for the Minister, Deputy, Executive Team and other senior Government officials on a regular and ad hoc basis (e.g. , Committee of Supply, Public Accounts, MLA reporting).
2. Provide support and leadership on financial monitoring and in-year reporting activities. Preparing correspondence to Treasury Board on Budget submissions and Quarterly Fiscal Updates, in accordance with Government and Ministry policies, processes, and guidelines, to manage within authorized spending target limits or identifies funding requirements and rationale for potential Supplementary Estimate approvals from Treasury Board.

**Activities:**

- Develop and maintain processes and systems to track budgets, funding, and Salary, Wage and Benefit allocations as well as spending authorities for the Ministry to ensure spending targets are not exceeded and Treasury Board is appropriately advised, or Supplementary Estimates request prepared per scheduled quarterly fiscal update submissions to Treasury Board and Finance.
- Communicates Treasury Board instructions to divisions on the Quarterly Fiscal Plan update requirements and revisions, including timelines for submissions and to facilitate ability of Budget Analysts to provide guidance and consultation to clients for program and administration funding requirements.
- Reviews forecast submissions compiled by Budget Analysts for accuracy and completeness, conformance with guidelines, and justification of requests.
- Provides direction to Analysts responding to diverse and competing budget submissions from business areas.
- Develops and reviews recommendations to managers in response to competing budget alternatives.
- Prepare and review Quarterly Actuals report submitted to Treasury Board.

3. Provide complex consultation and analyses, including identification of Ministry-wide implications for management information reporting to ensure senior Ministry decision-makers and managers have access to accurate, timely, and relevant planning and financial information.

**Activities:**

- Liaises with Ministry representatives to ensure appropriate understanding and application of planning and financial reporting processes and procedures, including impacts of results based budgeting processes.
- Analyzes financial information for major program initiatives and projects from a corporate perspective, identifying risks, developing appropriate options, and providing input into development of business cases to ensure Ministry financial interests are incorporated into analytical and decision-making process.

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- Maintains understanding of client business requirements through formal and informal exchange of information and provides guidance, expertise, and recommendations for clients to make financial and budgetary decisions.
  - Coordinates education and awareness training to Ministry business areas, including communication of Financial Planning unit and client roles and assessment of client satisfaction.
  - Responds to requests from senior management for ad hoc and routine financial information, including coordinating efforts of team members and colleagues to develop comprehensive responses.
  - Identifies instances where financial reporting procedures or applications are not consistent with Government and Ministry policies and participates in re-defining procedures; identifies requirements associated with new reporting standards, including those specified by the Public Sector Accounting Handbook (PSAB).
  - Researches impact and issues associated with revised financial reporting processes and develops recommendations for consideration of senior management representatives.
  - Recommends financial reporting enhancements and best practises for senior management consideration to support process improvements and increased financial accountability throughout the Ministry.
4. Financial, planning and monitoring processes, procedures, and transactions are reviewed and continually enhanced to ensure strong internal controls exist to support high levels of Ministry accountability and complex planning and decision-making requirements of business area clients and senior decision-makers.

**Activities:**

- Assesses current processes in collaboration with business areas and develops and implements program and service enhancements to address client requirements and support continuous improvement.
  - Coordinates establishment of controls within the Ministry to reflect GOA fiscal framework requirements.
  - Oversees provision of training to business areas to ensure expenditure officer responsibilities for budget preparation, monitoring, and reporting are properly carried out.
  - Researches, identifies, and recommends best practices and changes to internal operations and legislation or policies to streamline processes, minimize risk, and improve financial impacts on the Ministry and Government.
  - Identifies emerging issues, initiatives, and priorities with potential to impact operations; develops and implements processes and operational policies and procedures to meet business requirements.
5. Supports the Director in achieving the mandate and goals of their units and the Branch.

**Activities:**

- Responds to action requests and other enquiries and provides senior management with decision support by preparing correspondence, briefing notes, and financial reports.
- Researches, compiles, and develops information and summaries for complex initiatives and issues.
- Collaborates with Branch, Ministry, and Government representatives to promote coordination and integration of functions and activities.
- Participates in unit and Branch business planning activities and ensures Branch staff members are informed of issues impacting work area.

6. Cross-ministry committees and initiatives are provided with active participation to ensure the Ministry's interests and perspectives are represented.

**Activities:**

- Provides leadership and actively participates on internal and in cross-ministry committees and working groups, including those conducted by the SFO Best Practices Committee or related to Government-wide priority projects, representing Ministry interests and perspectives and ensuring linkages to Ministry business plan, including Results Based Budgeting.
- Provides input to development of Government budget preparation processes and supports development and monitoring of financial processes and policies relating to business practises.
- Provides briefings to Executive Team in relation to status of cross-ministry initiatives and priority projects.

**SCOPE:** List specific information that illustrates the challenges, problem solving and creativity requirements and decision making capacity of the position. Also identify the internal or external areas the job impacts (see Writing Guide [Pages 11-12](#)).

The Senior Budget Officer provides complex financial, analytical, and consultative expertise in preparing budget requests or reports for the Ministry Executive Committee and for the Minister to submit to Treasury Board. The position supports the Ministry's accountability framework, requiring an in-depth understanding of accountability requirements to develop budgets and financial statements. The Ministry's business and financial functions require a comprehensive understanding of Ministry core programs, initiatives, and financial systems to ensure the accurate reporting and updating of financial information in Ministry submissions, publications and reports.

The Senior Budget Officer will participate at a working committee or team level with both internal Ministry clients and external staff in other Ministries or agencies. The position:

- Interacts with representatives of Alberta Finance, Treasury Board and Enterprise, the Office of the Auditor General, and other ministries to discuss, explain, or justify the impact of activities or changes and analyze complex financial policies, collaborate on projects, negotiate solutions, and implement recommendations.
- Provides analysis, consultative and strategic advice and guidance to senior decision-makers in relation to budget planning and decisions, financial reporting and forecasting, internal controls and clarifying financial accountability requirements for staff.

The position works within the parameters of established policies and guidelines, with the Director providing only general direction and advice as to how work is performed. The Senior Budget Officer functions with considerable independence, making decisions as to appropriate approaches, presentation of financial impacts of proposed changes to business areas, and prioritization of responsibilities to meet commitments and deadlines. This position models initiative and creativity while contributing to the development of new financial policies that support continual improvement of financial accountability and control within the Ministry.

Work is reviewed in terms of achievement of outcomes; quality of leadership provided to staff members, clients, and stakeholders; continual improvement of day-to-day operations and program delivery, and extent to which results meet requirements of Branch, Ministry, and Government representatives and stakeholders. All financial information and related analysis provided by this position must be accurate, timely, reliable, and comprehensive.

The Director is available for guidance when dealing with particularly sensitive issues or clients. Complex and high profile financial analysis and reports are reviewed prior to submission to the Senior Financial Officer or Executive Team to ensure major assumptions are valid and consistent with Ministry goals. This position is relied on to maintain a comprehensive view of budget and financial matters within the Ministry to identify complex issues, recognize their impact, and develop recommendations and solutions to minimize risk and financial implications to the Ministry and Government. Decisions or recommendations on issues relating to policy interpretation are discussed with the supervisor, as are issues of a politically sensitive nature and sensitive situations involving clients or stakeholders.

**KNOWLEDGE, SKILLS & ABILITIES:** Include information on required diplomas and degrees along with identifying the most important knowledge factors, including knowledge about practical procedures, administrative, technical or professional techniques, technical, scientific or program related processes, etc. Detail specific training if there is an occupational certification/registration requirement for the position. Specify the type of experience required for the position (see Writing Guide [Pages 12-14](#)).

The Senior Budget Officer requires comprehensive knowledge of:

- Budgeting, financial administration, and financial forecasting and costing theories, techniques, and processes, particularly as they pertain to large and complex financial systems and analysis.
- Legislation, regulation and legislative process requirements for the Government and Ministry three year Business Plans, Fiscal Plan Updates, Results Based Budgets, Main Estimates, Supplementary Estimates, Annual Reports and Financial Statements.
- Ministry, Division, and Branch business priorities, programs, strategies, operational requirements, and future directions.
- Clients and stakeholders affected by the Ministry business plans and operations, including relevant organizations, committees, advisory groups, and representatives.
- The political environment within which the Ministry operates and decision-making processes of the Legislative Assembly, Cabinet, Caucus, Treasury Board and Government committees.
- relevant Government and Ministry legislation, regulations, and guidelines (i.e. *Results Based Budgeting Act; Financial Administration Act; Government Accountability Act; Government Organization Act; Freedom of Information and*

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*Protection of Privacy Act*; Treasury Board Minutes and Directives; Budgeting, Financial Planning, and Accounting Manuals).

- Financial information systems and business productivity software (i.e. Word, Excel, PowerPoint; 1GX financial systems; Electronic Payment System – EPS; Concur; and ETMS).

The Senior Budget Officer must have well developed and demonstrated:

- Analytical, conceptual, and research skills, including ability to analyze financial control issues and information obtained from multiple sources to develop solutions and recommendations for decision-makers.
- Verbal and written communication skills and presentation skills to communicate financial and accounting issues and information in a non-technical and concise manner to senior Ministry decision-makers and other representatives, as well as influence decisions and actions.
- Consultation, interpersonal skills, and facilitation skills to build and maintain collaborative working relationships with colleagues, clients, stakeholders, and central agencies.
- Negotiation and conflict resolution skills.
- Problem-solving and decision-making skills.
- Organizational and time management skills.
- Project planning and management skills.
- Leadership, and commitment to client service, confidentiality, tact, and diplomacy.
- Results-orientation, including commitment to meeting Government and Ministry business plan goals.

The Senior Budget Officer must be able to:

- Effectively present and defend analyses, assumptions, options, and conclusions to senior Ministry representatives.
- Provide consultation, guidance, and advice relating to complex financial reporting and accountability issues, budget and financial administration, to clients, including anticipating and planning for business area requirements.
- Coach and mentor staff members, ensuring transfer and development of budget, organizational, and financial and accountability knowledge and skills.
- Interpret legislation, guidelines, and Government and Ministry financial requirements.
- Maintain a strategic and Ministry-wide focus while delivering results at the operational level.
- Identify and monitor politically sensitive issues and develop appropriate responses and recommendations.
- Organize and prioritize demanding and complex activities and manage multiple priorities within a dynamic environment of competing and tight deadlines.
- Work independently as well as lead effectively in a team environment, balancing project priorities with ongoing responsibilities.
- Demonstrate initiative, flexibility, and creativity relating to assigned responsibilities.

#### Education and Experience

- Progressively responsible experience, including experience with complex financial reporting, internal controls, team leadership, and designing and interpreting financial policies and processes.
- Professional accounting designation (CA, CMA, CGA) and/or related degree or diploma supplemented by considerable experience in budgeting, financial reporting and variance analysis.

**CONTACTS:** Identify the main contacts the position communicates with and the purpose of the communication (See Writing Guide [Pages 14-15](#)).

The Senior Budget Officer has regular and ongoing contact with:

- Ministry representatives (senior and executive managers, Expenditure Officers, managers, etc.) to provide and exchange complex financial management information; analyze complex financial policies and issues; coordinate development of budgets; assess requirements relating to budget and financial management supports and information; resolve issues relating to financial reporting and accountability; provide consultation, recommendations, advice and coaching; and lead and participate in project teams and working groups;

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- Manager, Director, and Senior Financial Officer (as required) to interpret policy; report on achievement of performance objectives; and provide status reports on emerging or ongoing issues;
- Representatives of Treasury Board and Finance, the Officer of the Auditor General, the Office of the Chief Internal Auditor, and other departments (e.g. Service Alberta; Transparency, Transformation and Accountability)) to provide and exchange information; provide input to projects and initiatives; coordinate activities; resolve issues and concerns; and implement audit recommendations;
- Representatives of the offices of the Minister and Deputy Minister to provide information and resolve issues.
- The Executive Team to prepare and present information and recommendations relating to financial reporting and budget policies, status, issues, and processes as required; and
- Ministry stakeholders to exchange information; represent Ministry interests; and coordinate activities.

**SUPERVISION EXERCISED:** List position numbers, class titles, and working titles of positions directly supervised (see Writing Guide [Page 15](#))

N/A

**CHANGES SINCE LAST CLASSIFICATION REVIEW:** Identify significant changes that have impacted the responsibilities assigned to your position since the last review (see Writing Guide [Pages 15-16](#)).

The structure of the unit and the requirements of the position have changed since the position was filled previously. It is recommended that the position be a Budget Officer 3 position comparable to the other Senior Budget Analysts in the unit.

**ORGANIZATION CHART:** An organization chart that includes supervisor, peers and staff MUST be attached (see Writing Guide [Page 17](#)).

*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 Job Evaluation Unit, 6<sup>th</sup> Floor, Peace Hills Trust Tower, 10011 - 109 Street, Edmonton, Alberta, T5J 3S8, phone 780/408-8400 or contact your Ministry Human Resource Office.*

### Signatures

The signatures below indicate that the incumbent, manager and division director/ADM have read, discussed and agreed that the information accurately reflects the work assigned (see Writing Guide [Page 16](#))

