

**NON-MANAGEMENT JOB DESCRIPTION
POINT RATING EVALUATION PLAN**

Working Title Senior Budget Analyst		Name [REDACTED]	
Position Number [REDACTED]	Reports to Position No., Class & Level	Division, Branch/Unit Financial Services/K-12 Fiscal Oversight/BFA	Ministry Education and Childcare
Present Class Budget Officer 3		Requested Class	
Dept ID [REDACTED]	Program Code [REDACTED]	Project Code (if applicable) [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 Analyst plays a key role in a comprehensive range of budget management and fiscal analysis services for Education and Childcare. Working within the parameters of relevant Government Acts and Ministry policies and guidelines, the Senior Budget Analyst provides technical, analytical, and consultative services to the Department of Education and Childcare, the Department's senior management (Senior Financial Officer, and Committees) and professional staff in program areas.

This position plans and coordinates processes and initiatives to ensure Department senior management and staff are provided with instructions, guidance, and support required for short and long term budgeting, and current year revenue/expenditure forecasting. The Senior Budget Analyst also analyzes and interprets financial material from the assigned portfolio of programs, divisions, regions, Boards or Agencies (Portfolio), and will compile consolidated three-year budget plans and other financial submissions (e.g., quarterly revenue/expenditure projections) that will be reviewed by various bodies including the Department's senior management, Treasury Board and Finance, Treasury Board Committee, and the Legislature (e.g. Standing Committees).

This position will represent the Ministry and/or Finance unit at a working group level on internal program development initiatives; and on cross-government working groups dealing with budgeting, financial or associated activities and initiatives that may arise from groups such as the Senior Financial Officers Council; and Alberta Treasury Board and Finance. The role of the Senior Budget Analyst also includes anticipating Auditor General concerns and ensuring that appropriate controls are in place.

This position will participate with other Finance staff, and when appropriate Department and staff in changing, developing and implementing policies, procedures, controls and other initiatives that will address recommendations of the Office of the Auditor General.

The Senior Budget Analyst will also participate, and when necessary coordinate fiscal analysis on projects related to new or potential revisions to Ministry programs, policies, practices, strategies and processes.

The Senior Budget Analyst will also focus on the development and enhancement of methods and tools to maximize the effectiveness and efficiency of the budget management and fiscal analysis services provided by the branch, with an emphasis on developing processes to describe, examine, and evaluate solutions to issues facing the Ministry.

The Senior Budget Analyst reports directly to the Manager. The analyst works closely with assigned Portfolio to ensure financial information is consistent with the Ministry's and Government's goals and objectives.

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 all staff in the assigned Portfolio, with the preparation of annual expense and revenue budget and annual three-year budget (in accordance with Government and Ministry policies, processes, and guidelines). These activities are important in putting in place the financial plan of the Ministry, and sets the basis for subsequent monitoring, control, and some reporting of the Ministry's progress in fulfilling its business plan.
 - Communicates and clarifies/advises assigned Portfolio staff on budget target and related instructions, including timelines and guidelines for budget submissions, to facilitate the preparation and submission of annual, future year and supplementary estimate budgets, and supplementary financial information that will eventually appear in the Government Estimates and Ministry Business Plan.
 - Compiles budget submissions from the assigned Portfolio and reviews for accuracy and completeness, conformance with business planning and other guidelines, Ministerial direction, and reviews whether the proposed funding allocations are realistic with the environment assigned business entities operate within (e.g., Programs with little funding discretion do not appear to be seriously underfunded).
 - Provides leadership and coordination for the compilation and consolidation of Children's Services annual budget submission to Alberta Treasury Board and ensures budget materials are in proper presentation format. This includes supplementary forms and schedules required by Treasury Board officials.
 - Develops and maintains processes to inform assigned business entities of in-year and end-of-year changes and adjustments to their budgets and authorized spending levels. (This would include supplementary estimates approved during the year and any other budget changes as approved by Executive Team). Ensures that the financial system and other impacted systems are updated in a timely manner to reflect approved changes and adjustments.
2. Provides leadership to and works with assigned Portfolio and Departmental staff on financial monitoring and reporting activities. These activities are vital to ensure that the Ministry does not exceed its authorized spending limit, and to identify and explain factors that our impact our budget and put the Ministry in a position to identify and potentially request additional funding from Treasury Board Committee.
 - Develops and maintains processes and systems to track assigned Portfolio and Ministry-wide spending to ensure that expenditure targets are not exceeded.
 - Leads and coordinates the preparation, collection, and analysis of financial data for review by Department's senior management team, and the Minister.
 - Compiles and consolidates revenue and expenditure forecasts, and prepares related analysis for submission and review to the Department's senior management team and Alberta Treasury Board and Finance. Works with other finance staff on identifying/verifying cash flow requirements of the Department and the assigned Portfolio.
 - Participates in the preparation of financial and variance analysis, and other information as requested by Ministry officials.
 - Analyzes data and financial submissions from a corporate perspective, identifying risks, benefits, and developing options as appropriate.
 - Coordinates the development and interpretation of financial management reports and briefing materials submitted to senior managers to support informed decision-making.
 - Participates on Departmental and Ministry teams that are involved with the creation of new programs and initiatives that are targeted to be delivered through the business entities.
3. Provides advice, consultation, and input relating to complex financial administration issues to the assigned Portfolio and other stakeholders.
 - Provides guidance, expertise, and recommendations to assigned Portfolio staff, Department management, and program staff on initiatives that will impact the Ministry's budget or financial position. The advice and guidance is extended to ensure that adequate internal or offsetting controls are in place, and related processes and accountabilities are considered. These activities should reduce funding shortfalls from arising by surprise, and reduce the possibility of observations and recommendations for improvement from the Office of the Auditor General.
 - Leads and coordinates special projects within the Finance branch by providing technical and analytical

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support and ensuring provision of relevant and accurate information, analyses, and projections of potential effects of proposed changes to policies, practices, legislation and guidelines.

- Participates in cross-government committees and task forces, ensuring requirements and perspectives of Human Services are represented.
- Coordinates provision of training and support to assigned Portfolio and Department staff from assigned programs relating to automated reporting systems (SAP 1GX Solution for Government of Alberta) and budget processes and systems.
- Participates in the coordination and provision of training to assigned Portfolio and Department staff from assigned programs relating to budget processes and systems.
- Responds to communication requests and action requests as required.

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 Analyst is responsible for working with Department and assigned portfolio of Programs, Divisions Board and Agencies staff on budgetary and financial matters, but the position must also take a comprehensive view of budget and financial matters within the Ministry. The position must maintain this perspective when identifying complex issues, recognizing the impact at both an individual Divisions and at a Ministry/Government wide level, and develop appropriate analyses, solutions and recommendations. Advice and recommendations on financial and budgetary matters are provided to the senior management team of the Department and assigned Portfolio to support their decision making processes.

Depending upon the nature and/or scope of an issue, initiative or project, the Senior Budget Analyst will consult and work with Department staff and external clients.

The Senior Budget Analyst will participate at a working committee or team level on cross-government budget and financial project teams dealing with complex issues and initiatives that affect the Government as a whole, and in particular the Ministry of Human Services.

The Senior Budget Analyst is also expected to participate in working level project groups working on new initiatives and programs that will be developed and/or delivered by the assigned Portfolio. This is to ensure financial, and where applicable, administrative rules and requirements are communicated, understood and integrated into the developed initiatives and resolutions. The Senior Budget Analyst will use initiative and creativity in developing new processes and methods to maximize the effectiveness and efficiency of services provided to a Ministry with a large and complex budget and accompanying financial issues. Creativity is required to lead the development of comprehensive schedules and tables to clarify and support financial information presentations and the development of innovative solutions to budget and financial issues. The Senior Budget Analyst is also expected to contribute to the development of Ministry standards, practices, and procedures relating to budget and fiscal management.

The Senior Budget Analyst will work within the parameters of budgetary and financial policies and guidelines followed by the Government of Alberta and the Ministry.

The Senior Budget Analyst will be responsible for the development, maintenance, communication and understanding of funding allocation models used within the Ministry for allocating funds to the assigned Portfolio.

Work is reviewed for the quality of recommendations and conclusions provided and for the extent that results meet the requirements of senior and executive managers, business areas, Alberta Treasury Board and Finance, and other stakeholders. Work is performed under the general supervision of the Manager, and while some specific direction or instructions are provided, the position is required to demonstrate the ability to work independently, accurately, prioritize work to meet deadlines, and make sound decisions.

The Senior Budget Analyst is expected to discuss matters outside the scope of Budget and Forecasts or involving significant impact on other Ministry functions with the Manager. Changes to or interpretation of policy are discussed with the Manager. Major budget issues, expenditure variances, and changes to financial reporting processes should be discussed with the Manager. The Manager is also available for assistance when dealing with particularly sensitive situations or stakeholders. The Manager also reviews complex analysis packages coordinated by the Senior Budget Analyst prior to their being tabled with the Executive Team to ensure major assumptions are valid and goals and objective of stakeholders are met.

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 Analyst requires in-depth knowledge of:

- Budgeting, financial administration, and financial forecasting and costing theories, techniques, and processes. Preparation of complex financial statements and notes, including consolidated financial statements.
- Reporting and integrated financial information systems.
- Accounting concepts used in the public sector.
- Acts and related material on budgeting and financial administration within the Alberta Government (i.e. *Financial Administration Act, Government Organization Act, Fiscal Planning and Transparency Act, Freedom of Information and Protection of Privacy Act, Treasury Board Minutes and Directives, Manual of Financial Management, contracting/purchasing procedures and directives*)

The Senior Budget Analyst must have excellent:

- Analytical and problem solving skills verbal and written communication skills organizational and time management skills consultation and interpersonal skills.
- Problem solving and conflict management skills.
- Team building and relationship skills.

The Senior Budget Analyst must be able to:

- Effectively present and defend analyses, assumptions, options, and conclusions to senior Departmental and senior management team.
- Provide consultation, guidance, and advice relating to budgets, financial administration and fiscal analysis to clients. Coach and mentor staff within the Financial Planning and Initiatives unit and the assigned Portfolio to facilitate and ensure the transfer and development of budget, fiscal, and organizational knowledge and skills.
- Conduct research and analyze data.
- Interpret legislation, guidelines, and Government technical requirements for Ministry staff and stakeholders. Manage and prioritize demanding responsibilities given tight deadlines.
- Effectively use word processing and spreadsheet software (i.e. Word and Excel).
- Understand and work with large integrated financial systems such as IMAGIS (a PeopleSoft based system), and supplementary reporting tools.
- Work independently as well as contribute effectively in a team environment, including sharing knowledge and experience with other team members.
- Utilize initiative and creativity relating to assigned responsibilities.
- Work with other Budget Analysts within the Financial Planning unit in a professional manner.

Qualifications:

University degree in related field (i.e. Commerce, Finance, or Economics) and at least four years progressively responsible budgeting, accounting and/or financial reporting experience.

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Equivalency: Equivalent combination of education and experience

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

Key contacts include:

- Manager– this is the direct supervisor of the incumbent.
- Director, Budget and Fiscal Analysis– responsible for overall Ministry budget preparation, budget management and forecasting, fiscal reporting and analysis, capital planning and Ministry financial planning.
- Executive Director / Senior Financial Officer Financial Services – communicate financial forecasts and results for operational and strategic decision making. Participate in Division planning sessions and support budget and financial decision making.
- Financial Managers within the assigned Portfolio - provides leadership, advice, coordination and assistance with the preparation of the annual expense and revenue budget, on-going budget forecasts and financial planning. Provides financial advice to working groups/teams involved in program/division initiatives.
- Department Managers and External Stakeholders - participate at a working committee or team level on cross-government budget and financial project teams and on new initiatives and programs.
- Treasury Board and Finance Officials – provide requested financial and budget information and update Treasury Board and Finance databases and financial/budget tables.
- Ministry Executive Team – presents financial and budgeting results and recommendations and supports strategic budget and financial management decisions.

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

None

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](#)).

No change in assigned responsibilities and/or duties.

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