

Public (when completed)

Common Government

New

Ministry

Health

Describe: Basic Job Details

Position

Position ID

Position Name (30 characters)

Manager, Financial Planning

Requested Class

Manager (Zone 2)

Job Focus

Corporate Services

Supervisory Level

01 - Yes Supervisory

Cost Centre

Program Code: (enter if required)

Employee

Organizational Structure

Division, Branch/Unit

Finance & Capital Planning, Financial Planning



Current organizational chart attached?

Supervisor's Position ID

Supervisor's Position Name (30 characters)

Dir,FinPlanning HealthEntities

Supervisor's Current Class

Design: Identify Job Duties and Value

Job Purpose and Organizational Context

Why the job exists:

Reporting to the Director, Financial Planning - Health Entities Unit, the Manager, Financial Planning - Health Entities, is accountable for overseeing Health's budget management and fiscal analysis provided by This position ensures consistency between all financial documents produced to ensure that the needs of the Ministry are understandable and easy to comprehend by the Executive Team, the Minister, and Treasury Board Committee. This position requires an in-depth understanding of accounting and finance functions, including forecast modeling, budget management, and comprehensive knowledge of programs and operations offered by the Ministry. The incumbent provides leadership, coaching, proactive guidance, and reviews complex financial information and budget/forecast submissions.

Responsibilities

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

1. Budgeting and Fiscal Planning
 - Provide leadership and direction to develop and prepare information required to support the Ministry's three-year fiscal plan within the parameters and direction set by Treasury Board Committee, the Minister, and Executive Team (ET).
 - Ensure that briefing materials are available for the Minister, Deputy Minister, and the Assistant Deputy Minister of Finance and Capital Planning to support budget announcements, Committee of Supply deliberations, and other financial planning inquiries.

- Ensure entities have the appropriate financial information, including budget allocations and decisions, forecast changes, and other relevant financial data.
- The outcome is a published three-year financial plan as part of the Ministry Business Plan and an annual budget, which is measured against actual results that are published in the Ministry's Annual Report.
- Executive material is prepared to provide accurate and timely information to respond to urgent inquiries.

2. Forecasting

- Monitor and analyze forecast submissions against actual expenditures on a regular basis to identify potential issues and funding requirements.
- Ensure all issues that may impact the ability to balance the Ministry's budget are pro actively identified, with options and recommendations to address.
- Potential impacts on other divisions or Ministries must be included.
- Strategic options and recommendations are developed for consideration to address a surplus or a deficit position.

3. Timely Information and Analysis for Decision Makers

- Decision Makers (ET, Minister) are provided with timely and accurate analysis, and recommendations on which to base fiscal decisions in the development of the Ministry's budget.
- Ensure financial information provided to the Minister, ET, the Executive Director of Financial Planning Branch, and Director of Financial Planning - Health Entities Unit, is comprehensive, accurate, and timely. - This includes briefings for Treasury Board Committee and Committee of Supply.

4. Communication

- Internal and external communication provides timely, concise and accurate information.
- Provide input into various communication material, including briefings, news releases, formal email responses and budget/forecast documents along with published reports, such as the business plan and annual report.

5. Leadership

- Oversees the consistent provision of high-quality financial services to the divisions by supervising and coaching the budget analysts who provide budgeting, forecasting and financial planning services. Establish a working environment that is motivating and conducive to learning, creativity, and supportive of individual career paths by:
 - Ensuring performance agreements are in place for all staff;
 - Providing regular feedback and coaching to staff;
 - Building and maintaining staff morale;
 - Develop others by ensuring growth opportunities are provided to all staff including projects, cover-off, and training and development.
 - Support staff dealing with complex issues to ensure the best outcome for the department as well as growth for staff.

6. Consolidation

- Experience in the accounting consolidation entries between department and entities within the Government of Alberta.
- Monitoring and reviewing budget analysts entries into the government FATS system, ensuring updated entries are correct between the department and entities.
- Supervise the maintenance of working papers and reporting on consolidation.

Problem Solving

Typical problems solved:

Provide support and advice to the Director, Financial Planning - Health Entities Unit on annual funding requirements where requests for new funding exceed budget targets approved by Treasury Board Committee. This position will lead a quality review of all budget/forecast submissions and provide feedback. The outcome ensures appropriate allocation of approved funds that fits with the Ministry's goals,

strategies, and priorities.

Provide analytical services on new or enhanced initiatives, programs, or policies. The analysis must identify short-, medium-, and long-term financial implications to this Ministry as well as other Ministries. Accuracy is paramount, as decisions by Treasury Board Committee are based on the information the Ministry has provided. The analysis must be able to withstand the scrutiny of ET, the Minister, and officials from Treasury Board and Finance.

An example would be the changes to the benefit provisions as part of the Drugs and Supplemental Health Benefit Program. Some changes may have an impact on other Ministries, such as Community and Social Services.

Types of guidance available for problem solving:

The Manager, Financial Planning-Health Entities, must take a comprehensive view of budget and financial matters within the Ministry by identifying complex issues, recognizing their impact, and developing recommendations and solutions. The position also anticipates future issues, and knows how they impact the department, taking a broad, long-term view on assessing and providing options and implications of recommendations. The Manager, Financial Planning-Health Entities, works with internal and external clients and members of the team to complete responsibilities. In addition, this position must be aware of upcoming requirements and manage within existing resources. Work is reviewed in terms of achievement of outcomes and quality of leadership provided to the Health Entities Financial Planning team. Work is performed under the general direction of the Director of Financial Planning-Health Entities Unit.

Direct or indirect impacts of decisions:

Work is reviewed for the quality of innovative solutions, recommendations, and conclusions provided, and for the extent that results meet the requirement of senior and executive managers, program areas, Treasury Board Committee, and other stakeholders. The accuracy, timeliness, and completeness of the information provided to ET and Treasury Board Committee by this position and the positions it supervises is also important. The information generated is used in decision making by ET, the Minister, and Treasury Board Committee.

Key Relationships

Major stakeholders and purpose of interactions:

Director, Financial Planning-Health Entities Unit is the primary supervisor. Obtain general direction, guidance, and receive specific assignments and performance evaluation.

Executive Director, Financial Planning Branch - Support effective and timely strategic decisions through provision of information, analysis, and recommendations.

Financial Planning-Health Entities team members - Provide supervision, direction, and mentoring.

Budget Analysts, Expenditure Officers, and the Units of Financial Planning Branch - consult and collaborate on financial planning matters with stakeholders and co-workers to achieve Ministry goals.

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:

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

The Manager, Financial Planning - Health Entities requires knowledge of:

- Budgeting, financial administration, and financial forecasting and costing theories, techniques, and processes, including the preparation of complex financial reports.
- Experience in coordinating projects or programs, including consultation and working in teams.
- Comprehensive knowledge of management principles, especially related to human resources, financial planning, information technology, and communications.
- Relevant Acts and manuals relating to budgeting and financial administration, i.e., Financial Administration Act, Government Accounting and Organization Acts, Grants Regulations, Treasury Board Minutes and Directives, Sustainable Fiscal Planning and Reporting Act.

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 	Understands the big picture and the impacts of financial decisions and how that connects to budget decisions and the three-year fiscal plan.
Creative Problem Solving	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<p>Engages the community and resources at hand to 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 	Breaks down problems, undertakes appropriate research and investigation and draws on experiences to solve problems. For example, suggesting changes to budget and forecasting to be more efficient and effective.
Develop Self and Others	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Plans according to career goals and regular development:	Shares information, knowledge and experiences. Provides

		<ul style="list-style-type: none"> • Aligns personal goals with career goals • Leverages strengths; attempts stretch goals • Provides feedback and openly discusses team performance • Values team diversity, and supports personal development 	regular feedback and coaching to direction reports. Ensures performance agreements are in place for staff.
Agility	○ ○ ● ○ ○	<p>Identifies and manages required change and the associated risks:</p> <ul style="list-style-type: none"> • Identifies alternative approaches and supports others to do the same • Proactively explains impact of changes • Anticipates and mitigates emotions of others • Anticipates obstacles and stays focused on goals • Makes decisions and takes action in uncertain situations and creates a backup plan 	Willingness and ability to effectively work in and adapt to change. Able to modify approach to situations, encourage new ideas and solutions. Quickly adapt to changing priorities and provide innovative solutions.
Develop Networks	○ ○ ● ○ ○	<p>Leverages relationships to build input and perspective:</p> <ul style="list-style-type: none"> • Looks broadly to engage stakeholders • Open to perspectives towards long-term goals • Actively seeks input into change initiatives • Maintains stakeholder relationships 	Fosters positive and effective relationships with a range of stakeholders and staff internal to the Ministry and across the Government of Alberta. Able to connect and build trust, and to diplomatically manage relationships to bring differing perspectives together.

Benchmarks

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