

## Update

Ministry

**Describe: Basic Job Details****Position**

Position ID

Position Name (200 character maximum)

Current Class

Job Focus

Supervisory Level

Agency (ministry) code

Cost Centre

Program Code: (enter if required)

**Employee**

Employee Name (or Vacant)

**Organizational Structure**

Division, Branch/Unit

 Current organizational chart attached?

Supervisor's Position ID

Supervisor's Position Name (30 characters)

Supervisor's Current Class

**Design: Identify Job Duties and Value****Changes Since Last Reviewed**

Date yyyy-mm-dd

Responsibilities Added:

The position's responsibilities have been updated to align with the actual duties carried out by the role and to ensure that the job descriptions for both Program Services 4 roles in the unit are the same, as each position carries out identical duties supporting a specific portfolio of government ministries.

Responsibilities Removed:

All responsibilities related to Treasury Board and Finance departmental corporate planning have been removed.

## Job Purpose and Organizational Context

Why the job exists:

The Planning and Reporting Advisor is a key member of the Treasury Board Secretariat's Centre of Excellence for Planning and Reporting. The position supports ministries in developing and publishing business plans and annual reports, implementing the GoA Enterprise Risk Management Framework, and contributing to the development of the GoA Strategic Plan and Annual Report in accordance with the *Financial Administration Act*, the *Sustainable Fiscal Planning Act*, and the *Legislative Assembly Act*. The Planning and Reporting Advisor supports government decision-making through an integrated approach to evaluation and performance measurement at the intersection of finance and policy/program development.

The Treasury Board Secretariat's Centre of Excellence for Planning and Reporting provides advice and guidance to all Government of Alberta ministries on a suite of topics including strategic planning and reporting, operational planning and reporting, evaluation, enterprise risk management, and continuous improvement. This position supports the GoA-wide planning and reporting community through contributions to developing frameworks, policies, procedures, processes, guidelines and standards on these topics. Much of the work performed by the Planning and Reporting Advisor is extremely confidential and involves highly sensitive information on the proposed strategic priorities, policies and budgets of assigned ministries and the government.

## Responsibilities

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

1. Contributes to developing and implementing government standards for ministry business plans and annual reports.
  - a. Supports the development and revision of the Ministry Business Plan and Annual Report standards.
  - b. Develops and delivers training resources to support the dissemination of the standards across the business planning community.
  - c. Maintains knowledge of current and emerging best practices in government planning and reporting and contributes to continuous improvement.
  - d. Provides support, feedback and training to TBF colleagues and to Business Planning Working Group ministry contacts about business planning, results analysis and performance reporting and associated communications and timelines.
  
2. Supports development and publication of the Government of Alberta Strategic Plan and Annual Report.
  - a. Analyzes and synthesizes information from a broad range of sources, including but not limited to ministry mandate letters and confidential Treasury Board materials, to support the drafting of the Strategic Plan.
  - b. Coordinates ministry-level review of the draft Strategic Plan. Proactively mitigates ministry colleague concerns with accurate and prompt communication.
  - c. Integrates complex ministry input to ensure broad ministry perspectives are incorporated in central planning documents.
  - d. Coordinates updates and develops briefing materials, memos, presentations, etc. to support the development and approval of the GoA Strategic Plan and Annual Report.
  
3. Develops and provides strategic advice and support across a wide range of materials to support the Government of Alberta planning and reporting community.

- a. Regularly contributes to updating of the Government of Alberta Enterprise Risk Management Framework, including maintaining awareness of best practices in risk management and developing training materials related to ERM.
  - b. Contributes to the development of resources to support operational planning across the Government of Alberta, including toolkits, training materials, and best practice guides.
  - c. Develops and delivers training modules related to the team's mandate, including Management Competency Development training related to business planning and other topics.
  - d. Supports ministry colleagues and TBF colleagues to build their capacity to use planning and reporting work products to inform improvement strategies, carry out effective program and process evaluation and implement effective compliance and assurance processes.
4. Contributes to the integration of evaluation, policy, and financial teams across government.
- a. Develops resources related to performance measurement and evaluation, including *Measuring Performance: A Reference Guide*.
  - b. Proactively works with counterparts in Budget Development and Capital Planning branches to ensure that confidential Treasury Board materials align with ministry corporate planning materials and that a strong evaluation and measurement lens is applied.
  - c. Maintains awareness of Office of the Auditor General recommendations related to planning and reporting and uses strategic foresight to lead continuous improvement in the team's processes in light of those recommendations.
5. Supports an integrated approach to working within the Treasury Board Secretariat.
- a. Supports and maintains the division's operational planning system, SPORT, including inputs and edits to the system as well as supporting division colleagues through training sessions and system onboarding.
  - b. Runs regular reports from SPORT to support leadership discussion of division priorities.
  - c. Provides backup support to the Senior ADM's office on Treasury Board coordination when required, handling sensitive and confidential information to influence strategic decision-making.
  - d. Supports onboarding and orientation activities of new team members internal to the unit and division, including identifying needs and drafting or updating resources to support internal training.

## Problem Solving

Typical problems solved:

This position coordinates work and information across multiple ongoing complex projects within tight, overlapping, and shifting timelines. The incumbent must balance and determine competing priorities and complex communications and obtain and clarify content provided by ministries to ensure relevant and accurate planning and reporting.

This position has access to politically sensitive, confidential materials, and requires a combination of knowledge, experience, flexibility and situational context awareness to interpret actions in complex situations and carrying out priorities and solutions accordingly.

Types of guidance available for problem solving:

Legislation guiding this position's work includes the *Financial Administration Act*, the *Sustainable Fiscal Planning and Reporting Act*, and the *Legislative Assembly Act*.

This position's work is also shaped by the Ministry Business Plan Standards, Ministry Annual Report Standards, Government of Alberta Enterprise Risk Management Framework, and the *Measuring Performance* guide.

Work is performed within set policies and procedures, but the position works with a large degree of independence providing support and advice to a range of portfolio ministries. The manager and director of the unit are available to provide guidance, but the position is expected to provide consistent, timely advice as a recognized expert in planning and reporting.

Direct or indirect impacts of decisions:

1. The incumbent's understanding of government and ministry priorities, approaches, and internal/ external processes directly impacts the quality of assistance the incumbent can provide to ministry colleagues.
2. If the incumbent provides incorrect or low-quality advice, there is the potential for wide-ranging negative impacts across the GoA planning and reporting community.
3. The incumbent's ability to manage and apply wide-ranging, detailed knowledge and meet deadlines has a direct impact on the department's ability to meet legislated timelines for publishing accountability documents.
4. Given the position's location within the Treasury Board Secretariat, the incumbent has access to confidential information that has impacts on executive-level decision-making. The incumbent requires strong political acumen to effectively support stakeholders across every ministry and within central government decision-making bodies.
5. The position influences processes and quality of products across all government ministries. Without effective communication, time management, and project management skills, ministry partners could fail to provide deliverables of sufficient quality to support legislatively required public accountability, including but not limited to business plans and annual reports.
6. Alberta receives consistently high ratings on its budget documents, including providing clear and consistent messaging through the suite of documents including business plans. This position influences the ability of all government ministries to maintain this exceptional standard of public reporting.

## Key Relationships

Major stakeholders and purpose of interactions:

Branch

Manager, Strategic Planning and Policy (daily contact)

Receive general and specific direction, guidance and recommendations on operations, priorities, communications, deliverables and all aspects of daily work, project and special project work.

Report on progress

Provide analysis and recommendations on daily, operational, project, special project, and strategic work

Receive and incorporate feedback

Support administrative and process functions

Address urgent issues

Provide updates

Exchange information

Director, Corporate Planning and Performance Measurement (daily contact)

Receive general direction and guidance  
Report on progress  
Receive and incorporate feedback  
Support administrative and process functions  
Address urgent issues  
Provide updates

Treasury Board and Finance - Ministry

Team members; Branch members of Treasury Board Secretariat; Divisional contacts; Financial and Administrative Services; Office of the Controller; other TBF staff (weekly to monthly, as required)

Executive Leadership

Treasury Board (TB members review business plan and annual report standards, *Measuring Up*), Deputy Minister's Office, Minister's Office, Premier's Office (seek approval on various deliverables and products as required, multiple times per year)

Other Ministries

Communications and Public Engagement  
Portfolio ministries: Planning and reporting staff and contractors in other ministries (daily, monthly, quarterly, as required)

**Required Education, Experience and Technical Competencies**

Education Level	Focus/Major	2nd Major/Minor if applicable	Designation
Bachelor's Degree (4 year)	Public Administration	Arts	

If other, specify:

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

**Knowledge:**

Advanced working knowledge of the GoA's business planning and reporting cycle and processes, the GoA ERM Framework, Measuring Performance, quantitative and qualitative evaluation principles, and OAG program evaluation and performance reporting priorities and approaches.

Awareness of government strategic priorities, mandate, programs, decision-making processes, timelines and financial accountability environment and relationship integrations with planning and reporting.

Knowledge of relevant government legislation and regulations (e.g. *Financial Administration Act*, the *Sustainable Fiscal Planning and Reporting Act* and the *Legislative Assembly Act*).

Strong understanding of executive decision-making information needs, approaches and timelines.

Knowledge of the political environment within which the ministry, division and team operates and the decision-making processes of the ministry's Assistant Deputy Ministers, Executive Team, Executive Council, Deputy Ministers Council, Legislative Assembly and Treasury Board and Finance.

**Skills:**

Excellent interpersonal and communication skills including written, verbal, non-verbal, listening, receptiveness to coaching and incorporating feedback, strong public speaking and presentation skills of government business and financial subject matter, diplomacy, confidentiality, assertiveness, professionalism and the ability to synthesize technical, legal, and complicated content to communicate in plain language appropriate for the intended audiences.

Strong analytical, evaluative and critical thinking skills to determine the quality and integrity of information received and provided.

Well-developed project planning and coordination skills, and skilled execution using collaborative networks to plan contributions and complete concurrent complex projects and project components and milestones.

Collaborative teamwork, including communication, time management, problem-solving, consensus-building and follow through with commitments and responsibilities independently by working with team members.

Strong ability to learn new critical thinking, engage in continuous improvement steps, learn and transfer to team members knowledge, information, share duties, and convey technical, relational and software skills to support a well-functioning unit I under pressure of concurrent project demands.

Demonstrate ongoing capacity for continual assessment of ministry needs and preferences, and agile adjustment of use of available resources, communications and best practices to meet deliverables.

Proven ability to establish positive working relationships with a broad variety of clients and stakeholders and demonstrated success in managing complex issues within short timelines.

Self directed with the ability to work independently and collaboratively with others to achieve timely and quality outputs.

Skills in policy research methods, quantitative and qualitative evaluation, change management, and ability to analyze qualitative and quantitative data for quality assurance, continuous improvement and performance measurement.

Independent ability to apply legislation and regulations, policies, standards, processes, plans, and strategic initiatives of the department to daily work.

**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"> <li>• Takes holistic long-term view of challenges and opportunities</li> <li>• Anticipates outcomes and potential impacts, seeks stakeholder perspectives</li> <li>• Works towards actions and plans aligned with APS values</li> <li>• Works with others to identify areas for collaboration</li> </ul>	<p>This position requires a holistic view of the challenges and opportunities faced by government and by individual ministries. This requires ongoing evaluation, political acumen, and clear communication across ministries to ensure alignment with GoA priorities.</p>
Agility	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<p>Identifies and manages required change and the associated risks:</p> <ul style="list-style-type: none"> <li>• Identifies alternative approaches and supports others to do the same</li> <li>• Proactively explains impact of changes</li> <li>• Anticipates and</li> </ul>	<p>The incumbent must be resourceful, adapting to unforeseen circumstances (e.g., shifting timelines or last-minute changes in direction), conducting comprehensive and accurate analysis and advice for ministry</p>

		<p>mitigates emotions of others</p> <ul style="list-style-type: none"> <li>• Anticipates obstacles and stays focused on goals</li> <li>• Makes decisions and takes action in uncertain situations and creates a backup plan</li> </ul>	<p>partners under tight timelines and proposing options for senior official consideration based on thorough analysis.</p> <p>Providing guidance and training to Corporate Planning staff across government on business planning, reporting and Enterprise Risk Management, with a positive, professional attitude toward the work and stakeholders. The incumbent must have the ability to propose creative and efficient solutions to processes, as needed, which requires a solid understanding of change management principles.</p>
<p>Drive for Results</p>	<p><input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/></p>	<p>Takes and delegates responsibility for outcomes:</p> <ul style="list-style-type: none"> <li>• Uses variety of resources to monitor own performance standards</li> <li>• Acknowledges even indirect responsibility</li> <li>• Commits to what is good for Albertans even if not immediately accepted</li> <li>• Reaches goals consistent with APS direction</li> </ul>	<p>The incumbent must demonstrate motivation and accountability to manage and complete projects efficiently and on time (such as the GoA Strategic Plan and Annual Report), with a focus on continuous improvement, linking financial information to non-financial results.</p> <p>The incumbent must provide training across government on good Results Analysis reporting principles, in line with expectations of the Office of the Auditor General and must have the skills and tact to communicate opportunities for improvement to ministries. The incumbent supports and enables the other CP team members to recognize opportunities and interdependencies</p>

			and align ministry priorities with government commitments, and ensure goals and objectives are collectively achieved.
Develop Networks	○ ○ ● ○ ○	<p>Leverages relationships to build input and perspective:</p> <ul style="list-style-type: none"> <li>• Looks broadly to engage stakeholders</li> <li>• Open to perspectives towards long-term goals</li> <li>• Actively seeks input into change initiatives</li> <li>• Maintains stakeholder relationships</li> </ul>	<p>As the Center of Excellence for the GoA on planning and performance reporting, the incumbent must develop and maintain collaborative working relationships with contacts within the ministry and across all departments. CP is responsible for developing the GoA Strategic Plan and the Performance Results section of the GoA Annual Report.</p> <p>This requires the incumbent to establish relationships within the ministry and across government to quickly confirm and/or obtain information to ensure accurate and timely planning and reporting documents. The incumbent often makes decisions about who needs to be engaged, in what capacity, and at which point throughout the planning and reporting cycles. The incumbent must have strong communication (written and verbal), negotiation, collaboration, and project management skills to ensure legislatively required documents are produced accurately and on time.</p>

**Benchmarks**

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