

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:

- Expanded accountability for financial planning, forecasting, and reporting related to entities.
- Increased responsibility for the integration and consolidation of financial information between Department and entities.
- Enhanced coordination with internal and external stakeholders to align financial positions, assumptions, and reporting requirements.

Responsibilities Removed:

- Direct ownership of the Ministry's full three-year fiscal planning process, with the role now focused on coordination, integration, and quality review of inputs.
- Sole responsibility for corporate financial planning outputs, with greater emphasis on shared accountability across financial planning functions.

Job Purpose and Organizational Context

Why the job exists:

Reporting to the Director, Financial Planning & Operations, the Manager, Financial Planning is accountable for overseeing budget management, fiscal analysis, and financial planning services for the Ministry, including departmental and entity-related financial activities.

The position ensures consistency, accuracy, and clarity across financial documents and supports executive decision-making by providing comprehensive analysis to the Executive Team, the Minister, and Treasury Board Committee. This role requires in-depth expertise in accounting, budgeting, forecasting, and consolidation, along with strong knowledge of Ministry programs and operations.

The Manager provides leadership, coaching, and strategic guidance while reviewing complex financial information and budget/forecast submissions.

Responsibilities

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

1. Budget Coordination and Fiscal Planning

- Coordinate the development of the Ministry's three-year fiscal plan and annual budget, integrating inputs from across divisions and entities in alignment with Treasury Board direction.
- Lead the review and challenge function of divisional and entity submissions to ensure assumptions, pressures, and funding requests are accurate, consistent, and defensible.
- Support the preparation of executive materials for budget decisions, including Committee of Supply, Treasury Board submissions, and budget announcements.
- Ensure financial information provided across the Ministry is aligned, reconciled, and reflects approved decisions and priorities.

2. Forecasting and Financial Monitoring

- Oversee consolidated forecasting for departmental and entity operations, ensuring financial positions are accurate, integrated, and aligned across reporting streams.
- Identify, assess, and escalate fiscal risks, pressures, and variances, with clear analysis and recommended mitigation strategies.
- Ensure consistency between divisional, departmental, and entity forecasts, including alignment with the Ministry's overall fiscal position.
- Provide ongoing challenge and analysis to support in-year financial management and decision-making.

3. Decision Support and Strategic Analysis

- Provide analysis and advice to support executive decision-making on budget, forecasting, and emerging financial pressures.
- Lead and/or coordinate financial analysis on new or complex initiatives, including assessment of short-, medium-, and long-term implications across the Ministry and entities.
- Ensure materials for Executive Team, Deputy Minister, and Treasury Board are complete, accurate, timely, and defensible under scrutiny.
- Translate complex financial information into clear, decision-ready advice for senior leadership.

4. Financial Integration and Consolidation

- Oversee the integration and consolidation of financial information between the Department and Ministry entities, ensuring accuracy and alignment of financial positions.
- Review and validate consolidation entries and adjustments, ensuring compliance with government accounting standards and internal controls.
- Ensure consistency between financial systems, working papers, and reported outputs across departmental and entity reporting.
- Support the resolution of complex accounting and reporting issues arising from entity relationships.

5. Communications and Reporting

- Ensure financial information and reporting provided to senior leadership and central agencies is accurate,

clear, and aligned across all sources.

- Provide input into key accountability documents, including the business plan and annual report.
- Review and contribute to briefings, correspondence, and other materials to ensure financial accuracy and consistency of messaging.

6. Leadership and Team Management

- Provide leadership, direction, and oversight to financial planning staff, including coaching, performance management, and development.
- Establish a high-performing and collaborative team environment that supports quality analysis and continuous improvement.
- Support staff in addressing complex financial issues and managing competing priorities in a fast-paced environment.

Problem Solving

Typical problems solved:

- Provide advice on managing fiscal pressures where funding requests exceed approved targets, including assessing trade-offs, risks, and recommending options aligned with Ministry priorities and Treasury Board direction.
- Lead the review and challenge of divisional and entity financial submissions, resolving inconsistencies, incomplete information, and misaligned assumptions to ensure consolidated outputs are accurate, credible, and defensible.
- Analyze complex financial issues related to new or evolving programs, identifying financial implications across the Department and Ministry entities, including impacts that extend beyond a single program or fiscal year.
- Resolve issues arising from the integration and consolidation of financial information between the Department and entities, including differences in accounting treatment, forecasting methodologies, or system outputs.
- Identify and assess emerging risks and pressures in a dynamic environment where financial information may be incomplete or rapidly evolving, developing practical mitigation strategies for senior leadership consideration.
- Balance competing priorities, timelines, and stakeholder perspectives to deliver accurate financial information under tight deadlines for executive decision-making.

Types of guidance available for problem solving:

The Manager, Financial Planning operates under the general direction of the Director, Financial Planning & Operations. Work is guided by government legislation, policies, and directives related to financial administration, as well as Treasury Board decisions and Ministry priorities.

Direction is often broad, requiring the position to interpret guidance, apply professional judgement, and develop recommendations where processes may not be fully defined or where multiple approaches are possible.

The position works collaboratively across divisions and with entities, often without direct authority, requiring influence and judgement to achieve alignment on financial positions and reporting outcomes.

Direct or indirect impacts of decisions:

Decisions made by this position influence the accuracy, integrity, and alignment of financial information provided to the Executive Team, Deputy Minister, Minister, and Treasury Board.

The quality and timeliness of analysis and advice directly supports fiscal decision-making and the Ministry's ability to manage within approved budgets and respond to emerging pressures.

Inaccurate or misaligned financial information, particularly in consolidated reporting between the Department and entities, may result in inappropriate funding decisions, reduced confidence in fiduciary reporting, and impacts to Ministry operations and program delivery.

Key Relationships

Major stakeholders and purpose of interactions:

Director, Financial Planning & Operations (Supervisor): Provides strategic direction, priorities, and guidance. The Manager discusses complex financial issues, escalates risks, and provides analysis and recommendation to support decision-making.

Executive Director, Finance Planning/Assistant Deputy Minister's Office: Collaborates to support the development of strategic financial advice and ensures alignment of financial information and messaging for senior leadership, including Executive Team, Deputy Minister, and Minister.

Executive Team, Deputy Minister, Minister: Provides financial analysis, briefings, and advice to support decision-making related to budget, forecasting, and emerging financial pressures. Ensures information is clear, accurate, and defensible under scrutiny.

Treasury Board and Finance: Supports responses to information requests, briefings, and submissions, ensuring financial information is aligned with government direction and consistent with Treasury Board requirements.

Ministry Divisions: Works collaboratively to coordinate budget and forecast inputs, challenge assumptions, and resolve financial issues. Provides guidance and interpretation of financial direction to ensure alignment with Ministry priorities.

Entities: Collaborates to integrate financial planning, forecasting, and reporting activities between the Department and entities. Resolves issues related to consolidation, financial assumptions, and reporting alignment.

Financial Planning/Internal Teams: Provides leadership, direction, and oversight to staff, including budget analysts. Coordinates work across teams to ensure consistency, accuracy, and quality of financial information and reporting.

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 requires demonstrated experience and expertise in the following areas:

- Extensive experience in budgeting, financial planning, and forecasting, including the preparation and review of complex financial analysis and reports.
- Experience coordinating and reviewing financial inputs across multiple program areas and stakeholders, including the ability to challenge assumptions and ensure accuracy, consistency, and alignment of financial information.
- Experience supporting executive-level decision-making through the development of briefings, analysis, and recommendations for senior leadership.
- Knowledge of financial consolidation and reporting processes, including experience working with financial systems and ensuring alignment between departmental and entity financial information.
- Strong understanding of government financial legislation, policies, and directives, including the *Financial Administration Act*, *Sustainable Fiscal Planning and Reporting Act*, and Treasury Board directives.
- Experience analyzing complex or cross-cutting financial issues, including assessing financial risks, pressures, and impacts across programs or organizational boundaries.
- Demonstrated leadership experience, including supervising staff, providing coaching and performance management, and supporting team development.

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		
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 	<ul style="list-style-type: none"> Analyzes complex financial issues where information may be incomplete or inconsistent, identifying root causes and developing practical, defensible solutions to support decision-making. Resolves discrepancies in financial assumptions or reporting between divisions and entities by assessing options, consulting stakeholders, and recommending approaches that ensure accuracy and consistency.
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 	<ul style="list-style-type: none"> Integrates financial information across departmental and entity operations to ensure alignment of financial positions, identifying interdependencies and impacts of decisions on the Ministry's overall fiscal position and reporting outcomes. Anticipates downstream impacts of budget and forecast decisions across programs, entities, and reporting cycles, ensuring alignment with broader Ministry and government objectives.
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"> 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 	<ul style="list-style-type: none"> Responds to changing priorities, emerging fiscal pressures, and evolving direction from senior leadership by adjusting approaches and timelines while maintaining accuracy and quality of outputs. Supports the Ministry's ability to meet tight and shifting deadlines by reprioritizing work, managing competing demands, and guiding the team through periods of

		situations and creates a backup plan	change.
Develop Networks	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<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 	<ul style="list-style-type: none"> - Builds and maintains collaborative relationships with divisional staff, and entity finance teams to align financial assumptions, resolve issues, and ensure consistent reporting. - Engages stakeholders across the Ministry and entities to obtain input, reconcile differing perspectives, and support integrated financial planning and decision-making.
Develop Self and Others	<input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Plans according to career goals and regular development:</p> <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 	<ul style="list-style-type: none"> - Provides ongoing coaching and feedback to financial planning staff, supporting development of technical expertise, critical thinking, and understanding of complex financial processes. - Creates opportunities for staff to build skills through exposure to complex files, cross-team collaboration, and increasing responsibility, while supporting performance management and career development.

Benchmarks

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

Manager, Financial Operations and Reporting - Financial Services, Agriculture and Forestry
 Manager, Finance & Administration - Persons with Developmental Disabilities, Human Services