

Update

Ministry

Infrastructure

Describe: Basic Job Details

Position

Position ID

[Redacted]

Position Name (30 characters)

Budget Analyst

Current Class

Budget Officer Level 2

Job Focus

Corporate Services

Supervisory Level

00 - No Supervision

Agency (ministry) code Cost Centre Program Code: (enter if required)

[Redacted]

Employee

Employee Name (or Vacant)

[Redacted]

Organizational Structure

Division, Branch/Unit

Strategic Integration and Operations/Finance Branch

☒ Current organizational chart attached?

Supervisor's Position ID

Supervisor's Position Name (30 characters)

Supervisor's Current Class

[Redacted]

Design: Identify Job Duties and Value

Job Purpose and Organizational Context

Why the job exists:

This position is under the supervision of the Coordinator, Budget and Forecasting. The responsibilities of this Budget Analyst position include coordination, analysis and monitoring of budgets related to an assigned portfolio. This involves the assembly, review and analysis of the Ministries' annual three-year revenue and expenditure plans and the preparation of appropriate background information in support of analysis and recommendations for use by Executive Team, Deputy Minister and Minister in defence of budget plans and results to Treasury Board and Finance, Committee of Supply and Public Accounts Committee.

The position is required to communicate with clients at the highest level to meet client needs and expectations.

This position will also assist in the preparation and delivery of budget training and awareness programs throughout the Ministry.

Responsibilities

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

1. Preparation of the Ministry's annual and three-year fiscal plans.

Activities:

- Coordinate the preparation of detailed budgets for assigned Division(s).
- Analyze the business plan and current year budget information received from assigned Division(s). Review revenue, expenditure, capital investment, amortization, human resource requirements (full-time equivalents) and explanations provided; ensuring financial amounts are reasonable and information is complete. Compile estimates, income statements and financial information and ensure that the fiscal plan is consistent with the business plan goals and strategies for assigned Division(s). Develop an awareness of budget-related issues affecting other divisions.
- Prepare annual expense and revenue budgets and three-year fiscal targets including related briefing material for the Minister and Deputy Minister for use at Cabinet, Treasury Board and Committee of Supply meetings.
- Assist in preparation of various budget scenarios for Executive Team, Deputy Minister and Minister until final budget targets are approved by the Minister for submission to Treasury Board and Finance, and Treasury Board.
- Prepare budget and briefing material as part of the budget process to ensure the Ministry receives adequate resources to provide quality programs.
- Coordinate preparation of the Statement of Operations and Consolidated Net Operating Results for the three-year business plan.
- Process requests for changes in cost centres, ensuring changes are appropriate and are reflected in the financial system and supporting documentation. Restate prior year information for comparative purposes when appropriate.
- Liaise with the Ministry of Treasury Board and Finance as required on matters related to budget.
- Collect statistical data required for various research projects including analysis of program performance.
- Obtain an understanding of clients' business through formal and informal exchange of information.

2. Coordinate quarterly and monthly forecasts and financial updates.

Activities:

- Review Ministry spending to ensure it is within approved voted estimates and established controls.
- Prepare quarterly forecasts of expense and revenue, including dedicated revenue projections, for submission to the Ministry of Treasury Board and Finance, and Treasury Board.
- Prepare financial updates for Executive Team, including identifying major cost pressures and surpluses.
- Coordinate the preparation of the Ministry expenditure reports and prepare highlights of significant variances for review and decision by management.
- Prepare medium and long-range forecasts and cash flow requirements and monitor current expenditure trends.
- Maintain a formalized expenditure review process, identifying projected over/under expenditures and alert management to areas of financial concern.
- Liaise with the Ministry of Treasury Board and Finance as required on matters related to forecasts.
- Monitor full-time equivalent (FTE) allocation and usage for assigned Division(s), and coordinate

resolution of Human Resource system issues as required.

- Work with program areas and Financial Services to report on quarterly and year-end actuals as compared to budget. This includes preparing Ministerial briefing documents for Public Accounts Committee and Questions and Answers to Hansard Documents.

3. Support development of prudent business practices, and design and implement guidelines and procedures to improve ministry accountability.

Activities:

- Assist in the development of financial reports for use in management decision making using advanced reporting tools such as Excel, SAP queries, etc.
- Ensure that budget preparation, monitoring and evaluation guidelines and procedures are developed and communicated to assist program areas with the ongoing management of their financial and human resources.
- Represent the Ministry in system development activities related to budgets and forecasts.
- Participate in the review of the budgeting and forecasting guidelines and assist in implementing changes to streamline and improve procedures.
- Provide training and support to branches for developing detailed budget information and to assist in subsequent monitoring of their financial activities in support of program management's accountability for managing resources.

4. Work collaboratively with other staff in the Finance Branch to deliver quality financial services.

Activities:

- Participate in Branch and unit business planning activities.
- Ensure other staff within the Branch are informed of issues that impact their work area.
- Participate on Branch project teams as required to develop solutions to meet client business and information requirements.
- Work collectively with other staff to ensure quality and timely completion for all other work-unit related projects.
- Ensure that all Action Requests are professionally prepared and completed on time.
- Coordinate projects involving staff from other work units within the Finance Branch.

Problem Solving

Typical problems solved:

Recommendations made by this position will be quite broad and far-reaching as the incumbent will work closely with Finance Branch management and staff, program area staff, and officials from the Ministry of Treasury Board and Finance and other ministries to ensure adequate resources are provided and managed to meet business plan goals and objectives.

The incumbent is expected to independently handle all situations that fall within prescribed policies and procedures and scope out the requirements of assigned tasks.

The incumbent must be able to link the budgeting process with the business and capital planning processes, to ensure all budget related information is consistently incorporated and presented, as well as be able to relate the budgeting process with the accounting requirements to ensure all financial implications are considered and addressed.

The job often involves situations requiring analytical, interpretive, evaluative and/or developmental

thinking with few recurring precedents to look for assistance. This could include designing reports and conducting complex financial analysis in support of decision-making, where parameters are very broad in nature and few precedents exist to follow.

The incumbent must adapt to changes in the planning process in response to last minute decisions by Treasury Board, often resulting in new information requests for submission to the Ministry of Treasury Board and Finance, within very tight timelines and with very little time for consultation with program area staff and the Ministry of Treasury Board and Finance officials and subject to interpretation and judgement calls.

Types of guidance available for problem solving:

Ongoing consulting, training and awareness activities conducted by this position are aimed at improving overall effectiveness of budgeting and forecasting activities within the Ministry.

Significant coordination is required between the activities of this individual and other Budget Analysts within the Finance Branch in development of budget submissions and briefing materials for the Ministry as a whole.

Problems of an unusual nature such as policy interpretation or major budget variances or those issues of a politically sensitive nature are discussed with the Coordinator, Budget and Forecasting before action is taken.

Direct or indirect impacts of decisions:

All decision makers are impacted by the results and quality of the information compiled by the incumbent.

This job develops and manages effective processes for compiling budget and forecast information that allows the Ministry, Ministry of Treasury Board and Finance, and Treasury Board to quickly and effectively review and make funding and revenue decisions that impact both the Ministry and the government as a whole.

The development of comprehensive and meaningful briefing material to address priority departmental initiatives provides the basis for the Ministry to influence key government decisions. The Ministry's Executive Team, Deputy Minister and Minister require quality briefings to carry out their program and policy functions.

Key Relationships

Major stakeholders and purpose of interactions:

Stakeholders affected by the incumbent's work mainly include program area staff throughout the Ministry, and staff and officials with central agencies.

Required Education, Experience and Technical Competencies

Education Level	Focus/Major	2nd Major/Minor if applicable	Designation
Bachelor's Degree (4 year)	Business	Other	

If other, specify:

University degree in a related field is required. Near completion of an accounting designation is required.

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

Experience

- Two years related experience in a large financial organization.
- Experience with financial and business planning processes is desirable.
- Experience with SAP is desirable.

Technical Competencies

- Familiarity with Government financial legislation, regulations and policies.
- Ability to apply Generally Accepted Accounting Principles (GAAP) in conjunction with the Acts and Legislation of Infrastructure.
- Very sound working knowledge of accounting, budgeting and business planning concepts and processes of the Government and the Ministry.

- Experience with the operation of large complex financial systems and analysis, with exposure to different business and accounting methodologies desirable.
- Training in and familiarity with Microsoft Word and advanced skills in Excel spreadsheet applications.
- Advanced knowledge and experience using reporting tools such as Excel.

Other Competencies

- Excellent written and oral communication skills.
- High level of client focus using highly developed consultative skills to meet service expectations.
- Exercise tact and professional judgment when dealing with issues that are sensitive in nature. Significant discretion required in decisions regarding how to handle issues, and in making recommendations to senior management.
- Leadership skills.
- Ability to work effectively independently and within a team environment.
- Project management.
- Time management.
- Analytical and problem solving skills.

Equivalencies

- An equivalent combination of education and experience may be considered. This must include as a minimum, completion of a recognized applied accounting degree or diploma program.

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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Considers inter-relationships and emerging trends to attain goals: <ul style="list-style-type: none"> • Seeks insight on implications of different options • Analyzes long-term outcomes, focus on goals and values • Identifies unintended consequences 	Understand how the assigned work impacts and contributes to the achievement of department goals and anticipates change based on activities in other areas.
Creative Problem Solving	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Focuses on continuous improvement and increasing breadth of insight: <ul style="list-style-type: none"> • Asks questions to understand a problem • Looks for new ways to improve results and activities • Explores different work methods and what made projects successful; shares learning • Collects breadth of data and perspectives to make choices 	Creativity and originality in recommending and developing processes and solutions to meet client needs. Be proactive and take ownership for identifying solutions within his/her work.

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 situations and creates a backup plan 	Ability to adapt to changing priorities and respond to tight timelines.
Drive for Results	<input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	<p>Works to exceed goals and partner with others to achieve objectives:</p> <ul style="list-style-type: none"> • Plans based on past experience • Holds self and others responsible for results • Partners with groups to achieve outcomes • Aims to exceed expectations 	Results focused and cognizant of the need to meet the Government's and Ministry's business plan goals.
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 	Highly developed interpersonal relationship skills to enable the building of sound working relationships with colleagues, clients and central agencies. Ability to proactively build networks, connect, and build trust in relationships with different stakeholders.

Benchmarks

List 1-2 potential comparable Government of Alberta:

Benchmark Evaluation - 512BO02 (Budget Officer 2)

This benchmark was selected as the comparator to the position under recruitment as both positions provide management and program areas with budgetary information and financial analysis. Both positions require similar knowledge and experience, and involve coordinating with others, professional review, and forecasting of expenditures and revenues.