

Working Title

Budget Development and Planning Manager

Ministry

Treasury Board and Finance

Reference: [Management Job Description Writing Guide](#) (see [more resources](#) on the CHR website).

POSITION SUMMARY: Briefly describe the main purpose of the position, and why it exists for the most part.
(See Management Job Description Writing Guide [Page 7](#).)

The Budget Development and Reporting (BDP) Manager reports to a Director and works within a team of BDP Managers who are the front-line contact on a variety of budgeting and fiscal planning matters between Treasury Board and their assigned Ministries. As part of a central organization, BDP Managers provide information and advice to senior Treasury Board and Finance officials and the President of Treasury Board and Minister of Finance, mainly through the development of written briefings on ministry current and 3-year spending issues, the fiscal implications of proposed policies, and the processes used in spending and business planning. Some work will provide proactive planning information, but other work is often reactive as issues affecting assigned ministries arise. BDP Managers must be aware of developments both within and external to government in order to answer questions or prepare comments/analysis based on proposals/correspondence provided by others.

Much of the work is extremely confidential and involves highly sensitive information on the proposed budgets and policies of assigned ministries and the government (e.g. proposed mandates for government labour negotiations, possible staff reductions, etc.). BDP Managers work with detailed budget numbers within a complex fiscal framework and will track, analyze, compile, collect and report on information in support of further analysis done by ministries. A significant part of their role will be to review proposals to make recommendations on spending issues to senior decision makers.

SPECIFIC ACCOUNTABILITIES: List the most important end results or outcomes (not duties) of the position and how they are achieved. Each end result shows what the position is accountable for, within what framework and what the added value is. Normally a position has 4-6 core end results. For each end result approximately 4-6 major activities should be described.
(See Writing Guide [Page 8](#)).

- The BDP Manager is responsible for preparing timely and accurate analysis and recommendations on which to base spending decisions and develop budget details.
 - Serving as the key contact point for ministries, collect, compile and assess information on spending pressures faced by ministries. This will require consultation with ministries regarding their spending plans to have a full understanding of the ministries' intentions and expectations regarding potential under/over spending and policy directions.
 - Expert advice also requires an awareness of trends, policy developments, and financial and economic analysis of sector developments to be able to assess implications for the ministries and/or government policy.
 - Review ministry submissions – research, analyze and prepare summaries and recommendations for senior management and decision makers on issues with fiscal implications.
 - Develop background briefings for the Senior Assistant Deputy Minister, Deputy Minister and Minister of Treasury Board and Finance on proposed program policy, legislation and other matters for Cabinet and other committees.

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- The BDP Manager is required to assist in the coordination and development of budgets, Estimates, Supplementary Estimates, Accountable Advances, contingency transfers, business plans and contribute information related to fiscal planning and financial reporting activities.
 - Participates in developing instructions, workshops, templates and other materials to enable ministries to supply relevant and useful information that will aid in decision making.
 - Work with ministry officials to ensure budgets, business plans, Estimates and Supplementary Estimates comply with standards, meet legislated requirements and are consistent with the government strategic plan (reviewing for consistency and alignment).
 - Assist in the preparation of the Government of Alberta strategic plan and the government's annual report, working with ministries and other Treasury Board and Finance divisions as required.
 - Identify and work with ministries to explain significant variances in actual or forecasted results as compared to budget (quarterly reporting).
 - Identify, monitor and help to resolve issues that impact ministries and the government's fiscal plan, including the impact of activities by other governments and stakeholders.
 - Provide advice on process to develop fiscal recommendations when required.
 - Assist in the preparation of ministry business plan, Estimates, Supplementary Estimates and Fiscal Plan for publication.
- The BDP Manager must develop and maintain networks and provide support and advice as a key liaison related to the interpretation of the budget, fiscal framework, financial/accounting issues and processes.
 - Inform and educate ministries on budgeting, Estimates, fiscal policy, fiscal framework and financial related processes.
 - Work with ministries on financial/accounting issues, leveraging resources in other Treasury Board and Finance divisions as required.
 - Be aware of issues raised by the Office of the Auditor General, comment as required to ensure fair fiscal presentation, and advise ministries as required.
- The BDP Manager is required to develop and participate in communications, both external and internal to government, ensuring fiscal implications are timely, accurate and contain the intended message.
 - Provide input into Treasury Board and Finance press releases on fiscal plans and reports.
 - Review and provide comments to Treasury Board and Finance communications on fiscal information in news releases from ministries.
 - Prepare written responses for the President of Treasury Board and Minister of Finance to other ministries, non-government organizations and Albertans.
 - Assist in preparing comments/briefings for external parties.
- Other assigned responsibilities are carried out in a timely, accurate manner giving consideration to all relevant information.
 - Assist the department of Treasury Board and Finance in developing and meeting its business plan goals, including participation in working groups and assisting in developing business cases and Minister's Reports as required.
 - Represent Treasury Board and Finance on inter-ministry committees and working groups.
 - Provide advice and support to other analysts and to other areas within the ministry.
 - Lead/participate in divisional projects and initiatives.

KNOWLEDGE/EXPERIENCE: Include a list of the most important knowledge factors, including knowledge about practical procedures, specialized techniques etc. not only diplomas and degrees. 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 9-10](#).)

- University degree in Business, Economics, Public Administration or related discipline.
- An accounting designation is an asset.
- Experience in the provincial budget and financial planning process or in public administration is preferred.

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- Excellent communication skills are required, as well as strong technical and analytical skills and the ability to deal effectively with elected and senior government officials.
- Ability to exercise judgment when evaluating complex situations with multi-faceted criteria.
- Knowledge and understanding of the relevant legislative and the government decision-making process is an asset.
- Ability to research and apply policy and specific pieces of legislation (legislation to be used primarily financial such as the *Financial Administration Act*, *Fiscal Planning and Transparency Act*, and *Appropriation Act*) is required.

LEADERSHIP AND BUSINESS KNOW-HOW: Specify the level of coordination, organization and leadership skills required to produce the results expected of the position. Provide recent examples. (See Writing Guide [Pages 10-11.](#))

BDP Managers work independently to coordinate, monitor, and make recommendations relating to budget and financial planning matters for their assigned ministries. BDP Managers must facilitate ongoing communication and teamwork with others in the division and assigned ministries (most often the Senior Financial Officer and budget planning officials and also, depending on the ministry, Assistant Deputy Ministers). Often BDP Managers are the first point of contact on ministry inquiries. They must assess whether the issue relates to other branches of Treasury Board and Finance and coordinate with them as required.

PROBLEM SOLVING: Describe difficult or challenging situations the position is typically expected to solve and the assistance available. (See Writing Guide [Pages 11-12.](#))

BDP Managers must be knowledgeable about a wide array of extremely complex aspects of the government budget; for example, potential costs from labour settlements, factors affecting major program costs and utilization, and federal funding. Even for experienced BDP Managers, the level of detail and complexity of the various budget numbers can be challenging – particularly given the government’s fiscal framework that requires more detailed budget information to be compiled and understood. It is imperative for BDP Managers to maintain extreme attention to detail, and a clearly focused mind to keep detailed budget information correct while considering the policy implications of budget allocations. In addition, BDP Managers have to work within short, fixed and tight deadlines especially during the budget development period. As issues arise, they are required to be able to consult with senior management and/or others in Treasury Board and Finance and are expected to possess specialized knowledge or information (e.g., on accounting principles, on tax policy matters, on federal financing issues).

IMPACT AND MAGNITUDE OF JOB (SCOPE): Identify how the position directly affects results, and the extent to which stakeholders are affected by the outputs. Provide recent examples. (See Writing Guide [Pages 13-14.](#))

BDP Managers are responsible for providing information and advice on a variety of matters between Treasury Board and Finance and the ministries to which they have been assigned. The work involves extremely confidential and highly sensitive information on the proposed budgets, programs and policies of the assigned ministries and government. Failure of BDP Managers to provide accurate information to assigned ministries will lead to major discrepancies and potential misunderstandings which can have serious consequences for the budget and business planning process. BDP Managers also provide critical information and advice to the Minister, Deputy Minister and Treasury Board and provide input into external communications; as such, the BDP Managers must be aware and/or anticipate issues that could potentially affect their ministries and the government overall.