

New

Ministry

Seniors, Community and Social Services

Describe: Basic Job Details

Position

Position ID

Position Name (200 character maximum)

Manager, Financial Planning

Requested Class

Supervisory Level

Cost Centre

Employee

Employee Name (or Vacant)

VACANT

Organizational Structure

Division, Branch/Unit

CFA, Financial Planning & Analysis/Financial Planning

Current organizational chart attached?

Supervisor's Position ID

Supervisor's Position Name (30 characters)

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; the Manager, Financial Planning is accountable for overseeing the provision of budget management and fiscal analysis services provided by the Financial Planning team. 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, a 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 the Financial Planning Team to develop and prepare information required to support the Ministry's three-year fiscal 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 Corporate Finance and Accountability to support budget announcements, Committee of Supply deliberations, and other budget/forecast inquiries. Ensure divisions have the appropriate financial information to address priorities identified in the Ministry's business plan.

2. Forecasting

Monitor and analyze department forecast 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 department's budget are pro-actively identified, with options and recommendations to address. Potential impacts on other divisions, entities, or Ministry's must be identified and included. Strategic options and recommendations are developed for consideration to address a surplus or a deficit position.

3. Financial Advisory

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 budget. Ensure financial information provided to the Minister, ET, the Executive Director of the Financial Planning and Analysis Branch, and the Director of Financial Planning, is comprehensive, accurate, and timely. This includes drafting briefings in preparation for Treasury Board Committee and Committee of Supply meetings/presentations.

4. Communications

Communications, both external and internal, are timely, accurate, and contain the intended message. Provide input into news releases on department activities and policies to ensure accuracy. In addition, ensure all briefing notes and other materials are complete and accurate. Provide input into accountability documents such as the business plan and annual report. Effectively communicates financial information in a clear and concise manner both verbally and written.

5. Leadership

Oversees the consistent provision of high-quality financial services to the divisions by supervising and mentoring two senior budget officers as part of the Financial Planning Team. Employees provide budgeting, forecasting, and financial planning services to the department while establishing a working environment that is motivating and conducive to learning, creativity, and supportive of the 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.

Problem Solving

Typical problems solved:

Provide support and advice to the Director, Financial Planning 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 divisional budget/forecast submissions and provide feedback. The outcome ensures appropriate allocation of approved funding that fits with the Ministry's goals, strategies, and priorities.

Provide analytical services on new or enhanced initiatives, programs, and policies. The analysis must identify short-, medium-, and long-term financial implications to the 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 changes to income provisions as part of the Alberta Seniors Benefit Program. Some changes may have an impact on other Ministries such as Primary and Preventative Health Services.

The Director of Financial Planning, under the guidance of the Manager, is responsible for ensuring the accuracy of the forecast. If the forecast for the Department is overstated, programs may be curtailed or delayed, resulting in sub-optimal performance of the health system. If the forecast for the Department is understated, this may result in the Department being in a deficit financial position and would result in the ministry funds being encumbered in the following fiscal year.

Types of guidance available for problem solving:

The Manager, Financial Planning plays a critical role in overseeing budget and financial matters across the Ministry. This position requires a comprehensive understanding of complex financial issues, the ability to assess their impacts, and the skill to develop effective recommendations and solutions. The Manager proactively anticipates future challenges, evaluates their implications for the department, and provides strategic, long-term options to support informed decision-making.

Working collaboratively with internal and external stakeholders, as well as members of the financial planning team, the Manager ensures responsibilities are met with a high standard of professionalism. The role also involves managing within existing resources while remaining responsive to emerging requirements. Performance is evaluated based on the achievement of outcomes and the quality of leadership demonstrated within the corporate financial planning function. The Manager operates under the general direction of the Director, Financial Planning.

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 requirements of senior and executive managers, program areas, Treasury Board Committee, and other stakeholders. The accuracy, timeliness, and completeness of the information provided to the Executive Team 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 - Primary supervisor. Obtain general direction, guidance, and receive specific assignments and performance evaluation.

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

Regional Finance, Expenditure Officers and Program Area staff - consult and collaborate on financial planning matters with stakeholders and co-workers to achieve Ministry goals.

Financial Planning Team members - Provide supervision, direction and mentoring.

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 Financial Planning Manager 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. *Sustainable Fiscal Planning and Reporting Act, Financial Administration Act, Government Accounting and Organization Acts, Grants Regulations, Treasury Board Minutes and Directives*).

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"/>	Engages the community and resources at hand to address issues: <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 processes to be more efficient and effective.
Systems Thinking	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Takes a long-term view towards organization's objectives and how to achieve them: <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 related to funding pressures, budget decisions and the three-year fiscal plan.
Agility	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Identifies and manages required change and the associated risks: <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 	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.

		takes action in uncertain situations and creates a backup plan	
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 	<p>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, diplomatically managing relationships to bring differing perspectives together.</p>

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