

**New**

Ministry

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

Position ID

Position Name (30 characters)

Requested 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****Job Purpose and Organizational Context**

Why the job exists:

Reporting to the Manager, Financial Planning, the Senior Budget position is the lead for Ministry internal forecasting process, including providing the necessary support to divisions for all financial matters related to budget and forecast. The incumbent monitors revenue and expenditures, prepares briefing materials and provides financial planning consultative services to program areas in support of Ministry decision making.

In addition, the incumbent works with key financial contacts to ensure budget and forecast information is gathered for integration into the overall Ministry financial plan and provide supports for the quarterly fiscal updates submission to Treasury Board and Finance. The role also includes implementing new processes and working closely with the Department capital planning team for the quarterly capital projects reporting.

The position also serves as a subject matter expert for Business Intelligence, providing complex financial analysis and budgeting services in support of the Ministry Financial process. The incumbent provides comprehensive fiscal analysis, cost modeling services; develop internal forecast model; analyzes financial planning requirements; and improve internal reporting capability in the ministry by designing and maintaining business intelligence reporting solutions for various internal stakeholders including Financial Planning staff, Management, and Executive Team.

To support the one-government approach and streamlining processes for red tape reduction, key responsibilities of the position also includes implementing the enterprise financial planning platform in the ministry. The position is

instrumental in the development and support of a self-serve approach to information reports and access mechanisms by the user community. The incumbent will be expected to align the new platform with existing processes for data analyses, information reporting and data dissemination, and support new policy initiatives and address emergent issues.

Through various financial analysis (the development of scenarios, models, and methods), the incumbent describes, examines, and evaluates solutions to complex budget, reporting and financial issues facing the Ministry and contribute to informed decision-making. In addition, working in a team environment and within the parameters of relevant legislation, policies, guidelines, business practices, and Public Sector Accounting Standards, the position supports the completion of timely and accurate budget allocation, forecasts, cash projection, and analysis of actual results for the Ministry.

## Responsibilities

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

Leads the Department forecasting process and supports the quarterly fiscal updates to ensure compliance with Treasury Board and Finance, and internal departmental procedures.

- Works with the division contacts to provide:
  - advise and consultation services in the preparation of the program areas' detailed budget allocations, forecast and cash flow reporting
  - templates, forecast scenario/models and instructions to divisional key contacts for completion of their internal forecast
  - processes to track divisions' spending and vacancies
- Reviews submissions for completeness and reasonableness based on guidelines communicated annually to program areas. Investigate discrepancies
- Compiles consolidated forecast report for the Ministry, perform variance analysis, debriefs with the respective Ministry key contacts as required
- Assists in the preparation of Quarterly Fiscal Update submission to Treasury Board and Finance (for both operating expense and capital plan). This may include reviewing Template B, preparing variance explanations for Table 1 and CCP table, and other financial tables as required by Treasury Board Secretariat.

Provides Consultation and Leadership to key contacts in the divisions

- Interacts with staff throughout the Department, with an emphasis on providing advise and guidance to senior and executive managers to support decisions related to financial and budget matters.
- Supports program areas to ensure grants are properly approved and administered according to department policies and procedures, ensuring accountability from stakeholders and the Auditor general. This may also include review of grant agreements.
- Effectively communicates with key program contacts on information and provides feedback to program areas for financial and budget matter such as cost pressures, saving, capital projects, cash flow projection, and etc.
- Supports program areas to review new projects submission including project details, need assessment, business case and other supporting document for completeness and accuracy
- Assists with the development and interpretation of financial reports and briefing materials submitted to senior and executive managers as a basis for making informed decisions.

Provides comprehensive and complex financial, analytical, and consultative services to support effective Ministry financial planning and analysis activities

- Provides financial analyses and information as requested by senior Ministry officials (e.g. spending trending, interpretation of cost drivers, variance analysis of budget to forecast, forecast to actuals, etc.).
- Analyzes data and financial submissions, identifying risks and developing options as appropriate and providing recommendations.
- Examines issues identified by Ministry authorities related to funding and financial health and recommend alternatives and solutions where appropriate
- Performs ad-hoc and time sensitive analyses requested by Minister, Deputy Minister and senior management requiring knowledge of the ministry programs and creative and complex analytical skills.
- Assist in developing briefings and presentations related to major programs to ensure that the financial management needs of Ministry are met

-Analyzes and interprets a variety of financial, budget and accounting reports and data finding logical solutions to budget variance and financial reporting issues

Bridges existing financial planning gap until the enterprise financial planning solution is implemented

-Reviews financial requirements in the ministry, performs fit-gap analysis, identifies and recommends potential new approaches, methodologies, and technologies that provide enhanced financial planning solutions to the ministry

-Analyzes, designs, constructs, and documents business intelligence solutions using tools such as SAP Business Intelligence Suite tools, SAP Business Planning and Consolidation, Microsoft Power BI, Power Query, and Power Pivots for various financial planning needs such as consolidation of forecast submissions from divisions, including variance analysis, and identifies changes to the current forecast

-Leads the research and exploration of technology capabilities to improve the effectiveness of data analysis and for information dissemination

-Designs and conducts appropriate financial data analysis to support departmental initiatives and projects, and for forecasting program expenditures

Implements and supports the maintenance of new financial planning system and processes

-Manages system and business requirements to ensure system functionalities aligned with business needs. Where required, develop and implement business processes and controls to compensate any incompatible functionalities

-In collaboration with stakeholders (e.g. 1GX run team, Accenture, TBS), implements new enterprise financial planning solution in the ministry

-Ensures integration between Human Resource management and financial planning and reporting

-Represents the ministry in the GoA budget working group, participates in UAT and workshops to ensure ministry needs are met, business processes are properly formulated and implemented

-Develops change management plan including communication and training plan to ensure impacted staff are well-informed and trained

-Provides training and support to end users

Contributes and provides support to Financial Services Branch and division stakeholders

-Serves as resource Financial Services Branch in areas of business intelligence, fiscal plan development, forecasting and financial analysis

-Represents Financial Planning on Ministry and cross-government working groups, committees, and initiatives as required

-Provides support and input to development of policies and standards relating to data integrity, privacy, security, sharing, repository, and relations

-Provides leadership to clients relating to their ability to be more productive through use of information technology and more self-sufficient in directly accessing and manipulating data to meet their information requirement

- Provides advice and consultation to key contacts concerning the resolution of financial and budgetary issues

-Promotes education and awareness of clients as to general concepts and responsibilities relating to effective information and data management

-Performs other duties as required

## **Problem Solving**

Typical problems solved:

This position is an integral part of the ministry's team of budget analysts who provide various financial planning services for the Ministry. To be successful, this position must have an understanding of the programs and issues facing the divisions, and have an overall knowledge of the ministry's financial planning policies, procedures and processes, as well as the guidelines provided by Alberta Treasury Board and Finance. The position participates in the review and analysis of the issues, and in recommending viable solutions. The incumbent also works with ministry stakeholders to ensure capital plan planning and reporting activities are completed timely and effectively.

Advice and consultative services are provided to various levels of staff located throughout the province, creating communication challenges that must be resolved within rigid timelines. A high degree of accuracy is required at all times, since the information that is collected is combined to form the ministry's various submissions to TBS.

In addition, this position is required to take a comprehensive view of data / information architecture and complex data relationships in the Ministry, and work closely with the management team and stakeholders to identify business

requirements and recommend solutions to their needs. This position assists in identifying requirements for data marts, business catalogue, data models, multi-dimensional cubes, reports, and budgeting and forecasting models. The Business Intelligence Analyst must develop a thorough understanding of Ministry business activities, relevant financial concepts and legislative framework that the position operates in. The incumbent provides input to cross-functional, inter-divisional and cross-government teams on efficient and effective client access to business information and reporting projects.

1GX, a large, integrated and complicated government-wide reporting system, is used by this position to set up report layouts and queries to collect data for management decision-making. This position ensure the new financial planning solution, business processes, HCM and 1GX are aligned. The integrated solution requires the user to have a good understanding of the integration of various systems, including linkages with each other.

Types of guidance available for problem solving:

The position completes work within the parameters of established legislation, policies and processes of the Ministry and the Government and within the Public Sector Accounting Standards. Minimal guidance is provided relating to the provision of ongoing services, with the position undertaking and recommending solutions on its own initiative. General direction is provided at the beginning of new projects with objectives and timeliness.

Work is reviewed in terms of effectiveness, functionality, completeness, and timeliness of templates and reporting products provided to clients.

Direct or indirect impacts of decisions:

Information provided to stakeholders is relied on for decision making and reporting, and ramifications of providing inaccurate or incomplete information are significant.

## Key Relationships

Major stakeholders and purpose of interactions:

Manager, Financial Planning / Executive Director / Senior Financial Officer: attends meetings to discuss general directions for current financial planning issues, including capital plan.

Divisional Heads / Directors / Business Areas: ensures understanding and provides assistance as necessary regarding budgeting and forecasting modeling, reporting, and automation of manual work to support the budgeting and forecasting cycle activities.

Budget Analysts / Financial Analysts: collects business requirements to identify and address existing challenges, and develops and implements solutions that support Budget Analysts' / Financial Analysts' jobs.

1GX project team, Accenture: Ministry lead contact for the enterprise financial planning solution.

Alberta Treasury Board Analyst: secondary contact for the Ministry in addressing requirements from Treasury Board and Finance regarding budget / forecast submissions in Fiscal Accountability Tracking System (FATS)

## Required Education, Experience and Technical Competencies

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

If other, specify:

Accounting, Business Administration, Finance, Economics, Business Technology Management, MIS

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

- Bachelor of Commerce degree or equivalent
- Minimum of 4 years of related experience
- Comprehensive understanding of FAA. Fiscal Management Framework, government financial policies, including an understanding of budgeting/forecasting activities and funding allocation model

- Experience with ERP or financial software such as SAP
- Advanced knowledge and experience with Microsoft Office Suite, Excel expert
- Experience in data management software or language (business intelligence tools, SQL, VBA, Python, Tableau, Power BI)
- Excellent analytical and problem solving skills
- Advanced technical skills to extract, analyze and format information
- Excellent written and verbal communication skills
- Demonstrated technical proficiency with systems, financial data analytics and reporting
- Ability to effectively work independently with minimal supervision
- CPA-CGA, CPA-CMA, or CPA-CA designation is an asset
- Data Management and Analytics Certificate or related certification is an asset

### 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 type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <p>Works in open teams to share ideas and process issues:</p> <ul style="list-style-type: none"> <li>• Uses wide range of techniques to break down problems</li> <li>• Allows others to think creatively and voice ideas</li> <li>• Brings the right people together to solve issues</li> <li>• Identifies new solutions for the organization</li> </ul>   | Creativity is required to conceptualize new and innovative approaches to budget and forecast data collection, combining data from various sources, analyzing financial data, and developing dashboards and reports for Financial Planning team, Executive Team, and business areas through value-added products. |
| Agility                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <p>Proactively incorporates change into processes:</p> <ul style="list-style-type: none"> <li>• Creates opportunities for improvement</li> <li>• Is aware of and adapts to changing priorities</li> <li>• Remains objective under pressure and supports others to manage their emotions</li> <li>• Proactively explains impact of change on roles, and integrates change in existing work</li> <li>• Readily adapts plans and practices</li> </ul> | <p>-Foresees issues and opportunities related to funding and financial health of the organization and recommends alternatives and solutions where appropriate.</p> <p>-Performs ad-hoc and time sensitive analyses in anticipation of upcoming requests from Minister, Deputy Minister and senior management</p> |
| Drive for Results        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <p>Works to remove barriers to outcomes, sticking to principles:</p> <ul style="list-style-type: none"> <li>• Forecasts and proactively addresses project challenges</li> <li>• Removes barriers to</li> </ul>   | <p>-Lead the coordination for capital plan submission and reporting</p> <p>-Develops new approach for data collection, reports, dashboards to meet business needs</p>  |

|                                  |           |   |  |
|----------------------------------|-----------|---|--|
|                                  |           | <p>collaboration and achievement of outcomes</p> <ul style="list-style-type: none"> <li>• Upholds principles and confronts problems directly</li> <li>• Considers complex factors and aligns solutions with broader organization mission</li> </ul>   | -Implement the enterprise financial planning solution in the ministry  |
| Build Collaborative Environments | ○ ○ ● ○ ○ | <p>Collaborates across functional areas and proactively addresses conflict:</p> <ul style="list-style-type: none"> <li>• Encourages broad thinking on projects, and works to eliminate barriers to progress</li> <li>• Facilitates communication and collaboration</li> <li>• Anticipates and reduces conflict at the outset</li> <li>• Credits others and gets talent recognized</li> <li>• Promotes collaboration and commitment</li> </ul> | The success of the position relies on building collaborative environments. The position will work closely with internal and external stakeholders such as Budget Analysts business areas, TB Analyst, and service providers  |
| Systems Thinking                 | ○ ○ ○ ● ○ | <p>Integrates broader context into planning:</p> <ul style="list-style-type: none"> <li>• Plans for how current situation is affected by broader trends</li> <li>• Integrates issues, political environment and risks when considering possible actions</li> <li>• Supports organization vision and goals through strategy</li> <li>• Addresses behaviours that challenge progress</li> </ul>   | <p>-Ability to exercise diligence and professional judgment in providing advice and consultation services to stakeholders.</p> <p>-Ability to utilize resources, data and information to facilitate understanding and contribute to high-level decision-making process</p> |

## Benchmarks

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

Opted Out and Excluded - Benchmark Evaluation - 513B002 (Senior Budget Analyst)  
 Opted Out and Excluded - Benchmark Evaluation - 513SA10 (Senior Business Intelligence Analyst)