

## Update

Ministry

Transportation

### Describe: Basic Job Details

#### Position

Position ID

50017842

Position Name (30 characters)

Coordinator, Budget/Forecast

Current Class

Budget Officer Level 3

Job Focus

Corporate Services

Supervisory Level

01 - Yes Supervisory

Agency (ministry) code

Cost Centre

Program Code: (enter if required)

#### Employee

Employee Name (or Vacant)

#### Organizational Structure

Division, Branch/Unit

Finance Branch/Financial Planning

☒ Current organizational chart attached?

Supervisor's Position ID

Supervisor's Position Name (30 characters)

Supervisor's Current Class

Manager (Zone 2)

### Design: Identify Job Duties and Value

#### Job Purpose and Organizational Context

Why the job exists:

This position reports to the Director of Financial Planning. The responsibilities of this Coordinator, Budget and Forecast position include coordinating and compiling the consolidated three-year budget/business plan financial information, annual budget and monthly forecasts for the Ministry, and appropriate Minister's briefing materials for Treasury Board, Committee of Supply and Public Accounts Committee. This position is the senior professional finance expert providing financial analysis and support to programs under the assigned portfolio. This involves working closely with colleagues within the Transportation and other client ministries. The position is also responsible for various ad hoc projects and linking the funding requirements of various programs and initiatives to the multi-year fiscal and business planning process of the Government of Alberta (GOA). Also, the incumbent will provide supervision of professional staff in the analysis, coordination and development of Ministry financial/budget plans and related financial management processes/guidelines. The Coordinator, Budget and Forecast will play a lead role in the development and coordination of changes to budget policy, controls and regulations for the Ministry. The incumbent will assist in preparing responses to Ministerial Action Requests and delivery of budget training and awareness programs throughout the Ministry as necessary.

#### Responsibilities

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

**1. Develop/implement budget processes/guidelines/procedures and conduct financial analysis on projects, including identification of ministry-wide implications.**

**Activities:**

- Conduct budget analysis and assist in developing briefings related to major programs to ensure that the financial management needs of the Ministry are met.
- Coordinate implementation of budget policies and processes resulting from changes made by Treasury Board and Finance, in particular as they pertain to budgeting, control and monitoring of expense and investment.
- Provide support to the development of business cases for major initiatives to ensure that the financial interests of the Ministry are incorporated into the budget analysis and decision-making process, and any risks associated with the initiatives are identified and measured.
- Coordinate, analyse and monitor the preparation of the Ministry's:
  - Annual expense/capital investment and revenue budgets and three-year fiscal targets including briefing material for the Minister and Deputy Minister for use at Cabinet, Treasury Board and Committee of Supply.
  - Quarterly forecasts of expense, capital investment and revenue for submission to Treasury Board and Finance.
  - Regular financial updates to the Executive Team and the Minister, including identifying major cost pressures and funding options.
- Coordinate support to business planning and reporting activities related to Government of Alberta accountability requirements (Business Plan, Annual Report) and Ministerial briefings (Committee of Supply, Public Accounts).
- Coordinate support to capital planning and reporting activities related to the Capital Planning Initiative.
- Assist in linking the budget process with the business and capital planning process, to ensure all budget related information is consistently incorporated and presented.
- Provide support to the development of government-wide priority projects.

**2. Provide financial analysis and consulting services to assist program areas in their decision-making activities.****Activities:**

- As required, prepare briefing material on major issues and make recommendations for resolution of outstanding issues for senior managements' review and approval. Prepare budget and briefing material as part of the budget process to ensure the Ministry receives adequate resources to provide quality programs. Prepare ministerial briefing documents in advance of meetings of Cabinet, Treasury Board, Committee of Supply, Public Accounts Committee, etc, and prepare follow-up briefings/responses based on the outcomes of those meetings (e.g., written responses to unanswered questions posed at Committee of Supply, Public Accounts Committee).
- Obtain an understanding of client business requirements through formal and informal exchange of information.
- Participate in education and awareness-building activities of the branch, including definition and communication of roles and assessment of client satisfaction.
- Implement program/service improvements (i.e., explore 1GX solutions) as necessary to address client needs, and to streamline/improve internal processes.
- Respond to a wide variety of ad hoc and routine financial information requests from senior management:
  - Coordinate efforts with colleagues in developing joint Ministry responses.
  - Provide responses to information requests through the use of queries and reports.
- Implement program/service improvements as necessary to address client needs.
- Coordinate the development and interpretation of financial management reports and briefing materials submitted to senior management to support informed decision making.
- Coordinate preparation of short and long-term fiscal analysis to be used in the development of the department's annual budget, three-year business plan, and future decision-making, as well as monitoring of quarterly forecast and monthly cash flow requirements during the current fiscal year.
- As part of the ongoing budget review process, prepare budget scenarios for the current fiscal year to reflect changes as a result of deferrals, one-time funding, and other mid-year budget adjustments.

**3. Work collaboratively with other staff in the Finance Branch, the Ministry, other ministries and agencies to deliver quality financial services.**

**Activities:**

- Work closely with the program areas and other ministries (i.e., Treasury Board and Finance) to plan, coordinate and monitor Ministry programs within the Government of Alberta Fiscal Plan.
- Work in collaboration with program areas and other staff within the Finance Branch to monitor and identify any key items/issues related to projects or programs that could have financial or budgetary impacts.
- Work with the program areas to develop any new internal processes to ensure consistency and accuracy of information within the Ministry.
- Participate in cross-government committees, ensuring requirements and perspectives of Transportation are represented.
- Work in collaboration with program areas and other staff within Finance Branch on new initiatives and programs that are developed and/or delivered by Transportation.

**4. Maintain prudent business practices and strong internal controls, and design and implement policies and procedures to improve ministry accountability.**

**Activities:**

- Develop and maintain processes/procedures to support financial responsibility and accountability within the Ministry.
- Coordinate establishment of controls within the Ministry that reflect new budgetary policies for the government.
- Ensure the efficiency, effectiveness, and economy of processes for financial planning activities, by continually assessing which activities are being performed, how and why these are being done, if they can be accomplished in other ways and if they are adding value to the process. This involves researching, identifying, documenting and recommending to senior management quick wins and long-range internal changes as well as changes to existing legislation and policy, taking the following into account:
  - Financial implications to the Ministry and the government as a whole;
  - Impacts to internal and external stakeholders;
  - Assessments of risk;
  - The accuracy and validity of complex financial data;
  - Departmental and government policies.
- Ensure internal Ministry financial processes and reporting are aligned with and support key Ministry accountability documents.
- Work in collaboration with program areas to ensure changes/updates to project and program cash flows are accurately reflected in internal documents and templates on a periodic basis.

**5. Provide leadership and guidance to Finance staff in performance of duties.**

**Activities:**

- Manage human resources within the Financial Planning unit.
  - Supervise and coordinate the work of professional staff.
- Coordinate projects involving staff from other work units within Finance.
- Participate on Branch project teams as required to develop solutions to meet client business and information requirements.
- Participate in Branch and unit business planning activities.
- Ensure other staff within the Branch are informed of issues that impact their work area.

## Problem Solving

Typical problems solved:

The incumbent will work closely with Finance Branch management and staff, Senior Directors from program areas, officials from Treasury Board and Finance, the Office of the Auditor General, outside consultants and other ministries to analyze complex financial policy. The Coordinator, Budget and Forecast will assist in developing budget processes and procedures that will have a significant impact on all areas of the Ministry. The incumbent is expected to independently handle all situations that fall within prescribed policies and procedures and scope out the requirements of assigned tasks.

Types of guidance available for problem solving:

Problems of an unusual nature or those issues of a politically sensitive nature are discussed with the Director, Financial Planning before action is taken.

Direct or indirect impacts of decisions:

Recommendations made by this position will be quite broad and far-reaching. Decisions or recommendations are made on how to handle various issues that arise with regard to budget, forecast, policy implementation, and on how to handle issues that arise with the program areas.

## Key Relationships

Major stakeholders and purpose of interactions:

Stakeholders affected by the incumbent's work include program managers throughout the Ministry, staff and officials with central agencies, other ministries and agencies, and potentially external clients such as municipalities and the Federal Government. Interactions include all budget and forecast related matters.

## 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:

Professional accounting designation and/or related degree with major in accounting or Finance.

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

### Experience

- Several years in a large diversified organization.
- Experience with 1GX, IMAGIS or PeopleSoft financials is desirable.
- Experience with capital planning process, business case (including cost-benefit) analysis and development of financial policy is desirable.

### Equivalencies

An equivalent combination of education and experience may be considered.

## 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		
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

## Benchmarks

List 1-2 potential comparable Government of Alberta:

Senior Budget Analyst - 513B02