

Public (when completed) Common Government

Guide Benchmarks Competencies ?

| New  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|
| Ministry   |  |  |  |  |  |  |
| Seniors, Community and Social Services   |  |  |  |  |  |  |
| Describe: Basic Job Details  |  |  |  |  |  |  |
| Position   |  |  |  |  |  |  |
| Position ID  |  |  |  |  |  |  |
| 50017144   |  |  |  |  |  |  |
| Position Name (200 character maximum)  |  |  |  |  |  |  |
| Budget Analyst   |  |  |  |  |  |  |
| Requested Class  |  |  |  |  |  |  |
| Job Focus Supervisory Level  |  |  |  |  |  |  |
| Agency (ministry) code ? Cost Centre ? Program Code: (enter if required) ?                       |  |  |  |  |  |  |
| Employee   |  |  |  |  |  |  |
| Employee Name (or Vacant)  |  |  |  |  |  |  |
| 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 Finance Manager, the Budget Analyst is responsible for ensuring its business partners, Assisted Living and Social Services North Zone, are provided with timely and accurate financial information. Key responsibilities include the preparation and analysis of Budgets, Monthly Accrual & Financial Statement Working Papers, Expenditure & Revenue Forecast submissions, and other Ad hoc requests from the Regions & Ministry.

In addition, the Budget Analyst is responsible for implementing financial reporting and program changes, monitoring and analysis of accounts receivable, accounts payable, revenue & expenditures to ensure accuracy, participates in formulating solutions to problems having financial or accounting implications and in the development or improvement of financial procedures.

This position contributes to strengthening the organization's commitment to financial integrity and operational effectiveness.

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

- 1. Preparation of budgets:
  - Provide information, interpretation or instruction on budget allocation received from Ministry.
  - Prepare worksite budget allocation.
  - Analyze and review budget submissions for accuracy and completeness.
  - Prepare and submit budget load documents for Ministry.
- 2. Preparation of monthly and quarterly forecasts:
  - Acquire and maintain a comprehensive knowledge of the various program areas, staying informed about changes and new initiatives.
  - Evaluate and assess accuracy of the forecast through trend analysis, variance analysis, non-financial data and other forecasting tools.
  - Identify, describe, examine, and monitor financial issues arising in the program areas, using multiple or complex information systems to provide integrated analysis of program expenditures.
  - Assist and coordinate the preparation of three-year business plans and assist in strategic development for achieving financial targets.
  - Evaluate and report on financial performance compared to budget allocations and to prior period, as well as increases/decreases in forecasts. This includes preparing in-depth variance explanations.
- 3. Assist with monthly, quarterly, and year-end activities:
  - Provide guidelines to worksites in preparation of quarterly financial statement accruals.
  - Evaluate and assess accuracy of the accruals through trend analysis, variance analysis, non-financial data and other forecasting tools.
  - Make recommendation and adjustments to accruals when required.
  - Prepare monthly accruals based on analysis of expenditures processed and prior year history.
  - Prepare financial statement working papers and variance explanations for submission to Ministry.
  - Provide supplementary financial information and explanations to Auditor General/representative in relation to completing statutory audit.
- 4. Provide monthly and ad hoc reports when requested:
  - Provide and review a set of structured reports on a monthly basis.
  - Prepare and process transfer journals when required.
  - Provide ad hoc reports to address Regions needs such as caseloads analysis, FTE utilization, salaries and benefits expenditures, and monthly detailed expenditure reports.
- 5. Other Responsibilities:
  - Present financial information to Director & Senior Management, as required.
  - Participate in committees and working groups for development or implementation of new systems and/or policies.
  - Develop training material and implement training for worksite staff.
  - Cross train with other areas to provide assistance when required.

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### Typical problems solved:

This position is responsible for forecasting and budgeting functions. There is complexity in extracting and integrating information from different sources. As each Region has unique and diverse requirements, this creates a complex and creative process in budgeting and forecasting. The diversity of program structure and systems requires the Budget Analyst to implement innovative solutions. Changes in program structures, program policies, and accounting policies add to the complexity of this role. The ability to multitask and to prioritize and effectively manage short time lines is imperative to this role. The Budget Analyst must be able to accurately communicate ideas and information. The Budget Analyst must also be efficient, organized, and able to equally accommodate the needs of the Ministry, Division, Zone & Region.

#### Types of guidance available for problem solving:

The Primary sources of guidance are the Regional Finance Managers. This position works in parallel with other Budget Officer and Financial Analyst positions in Regional Finance. In addition, coworkers in other areas of Corporate Finance are resources for specific problem solving issues. For specific guidance regarding Program, the resources available often come from outside of Corporate Finance such as the Procurement & Resource Management, Information Technology, Administration, and Program Management teams.

### Direct or indirect impacts of decisions:

The purpose of preparing monthly forecasts is to project spending in the current and future years based on current and proposed policy. These projections are compared to budget and if there is a variance, Senior Management must make decisions that will affect the outcome based on the information provided by Regional Finance. This may include staffing levels, caseload volume approval levels and other factors that affect spending within Program.

# Key Relationships [2]

Major stakeholders and purpose of interactions:

The primary stakeholders are Corporate Finance as well as Program Delivery. The work performed by Regional Finance is used to support decisions made by these Management Teams to enable them to deliver services to Albertans within the specified budget each year.

## Required Education, Experience and Technical Competencies

| Education Level | Focus/Major | 2nd Major/Minor if applicable | Designation |
|-----------------|-------------|-------------------------------|-------------|
| Applied Degree  | Business    |                               |             |

#### If other, specify:

Business Diploma plus 4 years related experience. Accounting Designation is an asset.

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

- Knowledge of accounting and auditing principles and techniques (GAAP).
- Proficient communication and interpersonal skills.
- Ability to work independently with minimal or no supervision.
- Strong analytical and research skills.
- Strong ability to interpret and analyze a variety of financial documents.
- Thorough knowledge of mainframe and computer system applications (1GX, Microsoft Office, SharePoint, Outlook, Consolidated Services System (CSS), Electronic Payment System (EPS), and Contract Management Administration System (CMAS)).
- Ability to envision automation possibilities.
- Effective and efficient problem solving skills.
- Effective organizational and time management skills: ability to multi-task, manage and prioritize

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demanding responsibilities given competing and tight deadlines.

# Behavioral Competencies ?



Pick 4-5 representative behavioral competencies and their level.

| Competency               | Level<br>A B C D E | Level Definition  | Examples of how this level best represents the job  |
|--------------------------|--------------------|---|---|
| Agility                  |                    | Works in a changing environment and takes initiative to change:  • Takes opportunities to improve work processes  • Anticipates and adjusts behaviour to change  • Remains optimistic, calm and composed in stressful situations  • Seeks advice and support to change appropriately  • Works creatively within guidelines      | Regional Finance has a tight month end schedule that requires flexibility in completing accrual preparation, posting corrections, running reports, preparing working papers etc. Timelines may require shifting activities to ensure others are not being held up by our scheduling while also completing ad hoc reporting on demand. |
| Creative Problem Solving |                    | Focuses on continuous improvement and increasing breadth of insight:  • 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       | Regular change to Programs and systems means that process change is necessary to ensure we are using valid data to prepare forecasts and analysis. The development of CIMS for FSCD will change how the data is entered and collected and may change what data is actually available.   |
| Systems Thinking         |                    | Observes and understands larger impact of role: • Sees impact of work on organization; anticipates change in own area based on activities in other areas • Considers how own work impacts others and vice versa • Ask questions to understand broader goals • Aware of how organization adds value for clients and stakeholders | Much of the data used for forecasting is held in legacy systems. As Senior Management refines these Programs, they are asking for data and reports that are not necessarily available or may be subject to misstatement due to fundamental flaws in the assumptions. It is important to understand what is being asked and why.       |

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| Drive for Results   |                             | and part<br>to achie<br>• Plans I<br>experier<br>• Holds<br>responsi<br>• Partne<br>achieve | self and others<br>ble for results<br>ers with groups to<br>outcomes<br>o exceed | estima<br>time. F<br>errors a<br>assump<br>necessa<br>continu | sts are best tes at a point in Recognizing data and faulty otions are ary to show uous improvement naximizing budget ion. |  |
|---|-----------------------------|---|--|---|---|--|
|   |                             |   |  |   | + -   |  |
| Benchmarks ?  |                             |   |  |   |   |  |
| List 1-2 potential comparable Government                              | of Alberta: Benchmark       |   |  |   |   |  |
|   |                             |   |  |   |   |  |
| Assign  |                             |   |  |   |   |  |
| The signatures below indicate that all prequired in the organization. | parties have read and agree | that the job  | description accurately   | reflects th   | e work assigned and   |  |
| Employee Name   | Date yyy                    | /y-mm-dd  | -  |   |   |  |
|   |                             |   |  | 1   |   |  |
| Supervisor / Manager Name   |                             | /y-mm-dd  | Supervisor / Manager   | Signature   |   |  |
|   |                             |   | Remove Signat  | ure   | Add Signature   |  |
| Director / Executive Director Name                                    | Date yyy                    | /y-mm-dd  | Director / Executive Director Signature  |   |   |  |
|   |                             |   | Remove ADM Sign  | nature  | Add ADM Signature   |  |
|   |                             |   |  |   |   |  |
| ADM Name  | Date yyy                    | Date yyyy-mm-dd ADM S   |  | Signature   |   |  |
|   |                             |   | Remove DM Sign   | ature   | Add DM Signature  |  |
|   |                             |   |  |   |   |  |
|   |                             |   | <br>DM Signature   |   |   |  |

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