

Budget Officer – Opted Out and Excluded

APS Benchmark Listings

Sub.	Benchmark No.	Dept.	Working Title Job Title	Know-How				Creativity / Problem Solving		Responsibility		Total Points
				Prof./ Cont.	Comp. Div.	H.R. Skills	Points	%	Points	Profile	Points	
Budget Officer 3 (Point Range 439 - 518)												
OO/E	513BO02	Human Services	Senior Budget Analyst	F	I	2	264	38	100	B	100	464
Budget Officer 2 (Point Range 371 - 438)												
OO/E	512BO01	Human Services	Budget Analyst	E+	I	2	230	38	87	B	87	404
OO/E	512BO02	Service Alberta	Budget Officer	E+	I	2	230	38	87	B	87	404
OO/E	512BO03	Human Services	Regional Budget Officer	E+	I	2	230	33	76	B	76	382
Budget Officer 1 (Point Range 269 - 370)												
OO/E	511BO03	Advanced Education	Budget Analyst	E	I	2	200	33	66	B	66	332

Last Review / Update: 2016-03-11

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Opted out and Excluded Benchmark Evaluation - 513BO02

Identification Section

Working Title:	Senior Budget Analyst
Department:	Human Services
Division, Branch/Unit:	Ministry Support Services Services, Financial Strategies
Reports To:	Senior Manager, Budgets and Analysis
Levels to D.M.:	4
Job Description:	513BO02
MRS:	See Minimum Recruitment Standards for Budget Officer
Job Code:	513BO - Budget Officer Level 3 (See Opted out and excluded pay plans and salary ranges – Schedule 1, Part 2-A)

[Organization Chart](#)
(requires login)

Evaluation
Knowledge
FI2 264
↓
Creativity/Problem Solving
38% 100
↓
Responsibility
B 100
↓
TOTAL JOB POINTS
464

Comments on Role

The Senior Budget Analyst is the senior budget expert within the Ministry and provides advanced, specialized professional technical, analytical and consultative services across a complex organizational governance structure consisting of 10 Child and Family Services Authorities (CFSAs) who operate as separate and distinct business units, the Child and Youth Advocate, the department and staff, and to the department's senior management committee on budget management and fiscal analysis. The position is responsible for planning and coordinating processes and initiatives, including the provision of clear instruction and direction/guidance for short and long term budgeting and current revenue/expenditure forecasting. Position coordinates and compiles the consolidated 3-year budget/business plan, annual budget and monthly forecasts/projections for the Ministry and appropriate Minister's briefing materials for Treasury Board and Cabinet Policy Committee.

The position is responsible for leading ministry-wide projects and represents the Ministry on cross-government committees and initiatives.

Comments on Evaluation

- **Knowledge:**

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Content:

- **F:** The Senior Budget Analyst is a specialized advanced role combining broad theoretical financial and senior professional practice knowledge associated with an accounting designation together with in-depth knowledge and experience of budgeting, forecasting projections, funding models and fiscal management policies, practices and processes within the ministry and government. This position is the senior professional expert in multiple areas applying its expertise and theoretical knowledge. The position is adept in preparation of very complex financial statements and notes including consolidated statements. Requires strong knowledge of the Ministry's programs and initiatives with significant knowledge of their financial aspects and uniqueness. Strong knowledge of financial and information reporting systems within the GOA and the Ministry. Strong knowledge and understanding of various funding model methodologies. Knowledge and understanding of the ministry structure and reporting relationships.

Also works with external DFNA's (Delegated First Nations Agency) on initiatives and responsibilities requiring a knowledge of Aboriginal culture and structure.

Complexity and Diversity:

- **I:** Working within the unique and complex governance structure of the ministry and external DFNA's must understand how the work impacts the budget process. The 10 CFSAs operate as separate and distinct business units and produce their own financials. Position provides expert, professional advice on a variety of budget issues, concerns requiring an understanding of the program, expectations and concerns taking into account the broader Ministry and GOA perspective.

Human Relations Skills:

- **2:** The position provides senior consultation, guidance and direction including the interpretation of complex technical information to a diverse range of staff across the Ministry from senior financial to management and staff requiring well developed interpersonal skills. Position provides guidance and direction to the CFSAs on budget reporting requirements Position leads ministry-wide projects requiring strong interpersonal skills and ability to influence.

- **Creativity/Problem Solving:**

38%: Provides leadership on financial monitoring and reporting activities ensuring the Ministry and Department do not exceed authorized spending limit or identify and explain factors impacting the budget to position so as to be able to potentially request additional funding. The position applies expert knowledge of funding allocations models to develop the regional resource allocation funding model used for allocating funds to the CFSAs. Applies knowledge to develop various forecasting and budget projections for the Ministry including the development of the 3-year budget, and consolidating 10 CFSAs financials and department budgets. Provides expert professional advice and consultation to a diverse range of stakeholders requiring the position to identify, analyze and resolve complex issues and

questions and provides recommendations to reconcile differing requirements while being aware of the broader Ministry and GOA perspective.

- **Responsibility:**

B: Position provides professional consultative and advisory financial support to the Ministry including the individual CFSA's as well as the development and production of budgets and financials for the Ministry.

Last Reviewed: November, 2009

Alberta Government

Last Review / Update: 2015-04-13

Opted Out and Excluded Benchmark Job Description - 513BO02

Identification Section

Working Title:	Senior Budget Analyst
Department:	Human Services
Division, Branch/Unit:	Ministry Support Services Services, Financial Strategies
Reports To:	Senior Manager, Budgets and Analysis
Levels to D.M.:	4

Purpose

(Brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization.)

The Senior Budget Analyst plays a key role in a comprehensive range of budget management and fiscal analysis services for Children and Youth Services. Working within the parameters of relevant Government Acts and Ministry policies and guidelines, the Senior Budget Analyst provides technical, analytical, and consultative services to staff in the Child and Family Services Authorities (CFSAs), the Department of Children and Youth Services, and to the Department's senior management committee.

This position plans and coordinates processes and initiatives to ensure Service Alberta, department and CFSA management and staff are provided with instructions, guidance, and support required for short and long term budgeting, and current year revenue/expenditure forecasting. The Senior Budget Analyst also analyzes and interprets financial material from CFSAs, and will compile consolidated three-year budget plans and other financial submissions (e.g. quarterly revenue/expenditure projections) that will be reviewed by various bodies including the Department's senior management, the Ministry Executive Team, Alberta Finance, Treasury Board, Cabinet Policy Committee, and the Legislature (eg. Committee of Supply). The position will also prepare appropriate Minister's briefing materials for Committee of Supply, Treasury Boards and Cabinet Policy Committee.

This position will represent the Ministry and /or Finance unit at a working group level on internal program development initiatives; and on cross-government working groups dealing with budgeting, financial or associated activities and initiatives that may arise from groups such as the Senior Financial Officers Council' Administrative Services Council; Finance and Enterprise, or Service

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Alberta. The role of the Senior Budget Analyst would also include anticipating Office of the Auditor General concerns and ensuring that appropriate controls are in place.

This position will participate with other Finance Staff, and when appropriate Department and CFSA staff in changing, developing and implementing policies, procedures, controls, and other initiatives that will address recommendations of the Office of the Auditor General.

The Senior Budget Analyst will also participate, and when necessary coordinate fiscal analysis on projects related to new or potential revisions to Ministry programs, policies, practices, strategies and processes.

The Senior Budget Analyst will also focus on the development and enhancement of methods and tools to maximize the effectiveness and efficiency of the budget management and fiscal analysis services provided by the Financial Strategies branch, with an emphasis on developing processes to describe, examine, and evaluate solutions to issues facing the Ministry.

The Senior Budget Analyst reports directly to the Manager, Budget and Fiscal Analysis. This position works closely with CFSAs, the Child and Youth Advocate's Office and the department program areas to ensure financial information is consistent to the Ministry's and Government's goals and objectives.

Responsibilities and Activities

(Each end-result/responsibility shows what the job is accountable for, within what framework and what the added value is.)

- 1. Provides leadership and coordination to staff in the CFSAs, department and as required to staff of Service Alberta, involved with the preparation of individual CFSA and the Ministry of Children and Youth Services annual three-year budget/business plan (in accordance with Government and Ministry policies, processes, and guidelines.) These activities are important in putting in place the financial plan of the Ministry, and sets the basis for subsequent monitoring, control, and some reporting of the Ministry's progress in Fulfilling its business plan.**

Activities:

- Communicates and clarifies/advises Department and CFSA staff on budget target and related instructions, including timelines and guidelines for budget submissions, to facilitate the preparation and submission of annual, future year; and
- Supplementary estimate budgets and supplementary financial information for GOA estimates, and the Ministry and CFSA business plans.
- Compiles budgets submissions from Department and CFSAs to review for accuracy and completeness, conformance with business planning and other guidelines, Ministerial

directions, and reviews whether the proposed funding allocations are realistic with the environment that the CFSAs operate within (e.g. Programs with little funding discretion do not appear to be seriously under funded).

- Provides leadership and coordination for the compilation and consolidation of Children and Youth Services annual budget submission to Finance and Enterprise, and Treasury Board in proper presentation format. This includes supplementary forms and schedules required by Finance and Enterprise.
- Develops and maintains processes to inform CFSAs of in-year and end-of-year changes and adjustments to their budgets and authorized spending levels. This would include agreed to changes between CFSAs; supplementary estimates approved during the year; parental financial contributions collected for children in the care of a CFSA, etc. Ensures that the financial system and other impacted systems are updated in a timely manner to reflect approved changes and adjustments.

2. Provides leadership to and works with CFSA and Departmental staff, and as required staff of the Service Alberta network, on financial monitoring and reporting activities. These activities are vital to ensure that the Ministry does not exceed its authorized spending limit, or identify and explain factors that impact the budget and put the Ministry in a position to identify and potentially request additional funding from Treasury Board.

Activities:

- Develops and maintains processes and systems to track Child and Family Services Authority and Ministry-wide spending to ensure that expenditure targets are not exceeded.
- Leads and coordinates the preparation, collection, and analysis of financial data for review by Department's senior management team, Minister, and when applicable the Co-Chairs and/or Chief Executive Officers of the CFSAs.
- Compiles and consolidates revenue and expenditure forecasts, and prepares related analysis for submission and review to the Department's senior management team and Finance & Enterprise. Works with other finance staff on identifying/verifying cash flow requirements of the Department, and the individual CFSAs.
- Participates in the preparation of financial and variance analysis, and other information as requested by Ministry officials (i.e. Relationship between funding costs and expenditure levels, identification and interpretation of cost drivers, etc.).
- Analyzes data and financial submissions from both a CFSA and a corporate perspective, identifying risks, benefits, and developing options as appropriate.
- Coordinates the development and interpretation of financial management reports and briefing materials submitted to senior managers to support informed decision-making.
- Participates on Departmental and Ministry teams that are involved with the creation of new programs and initiatives that are targeted to be delivered through the CFSA network.

3. Provides advice, consultation, and input relating to complete financial administration

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issues to the CFSAs, department and other stakeholders.

Activities:

- Provides guidance, expertise, and recommendations to CFSA staff, Department management, and program staff on initiatives that will impact the Ministry's budget or financial position. The advice and guidance is extended to ensure that adequate internal or offsetting controls are in place, and related processes and accountabilities are considered. These activities should reduce funding shortfalls from arising by surprise, and reduce the possibility of observations and recommendations for improvement from the Office of the Auditor General.
- Leads and coordinates special projects within the Finance branch by providing technical and analytical support and ensuring provision of relevant and accurate information, analyses, and projections of potential affects of proposed changes to policies, practices, legislation and guidelines.
- Participates in cross-government committees and task forces, ensuring requirements and perspectives of Children and Youth Services are represented.
- Coordinates provision of training and support to CFSA and Department staff relating to automated reporting systems (IMAGIS) and budget processes and systems.
- Participates in the coordination and provision of training to Child and Family Authority and Department staff relating to automated finance related service system (EPS, EX-Claim 2, IMAGIS).
- Responds to Communication Branch requests and Departmental action requests as required.

Scope

(Illustrates what internal or external areas the job impacts, and the diversity, complexity, and creativity of the job.)

The Senior Budget Analyst is responsible for working with Department and CFSA and Service Alberta staff on budgetary and financial matters, but the position must also take a comprehensive view of budget and financial matters with the Ministry. The position must maintain this perspective when identifying complex issues, recognizing the impact at both an individual CFSA, and at a Ministry/Government wide level, and develop appropriate analyses, solutions and recommendations. Advice and recommendations on financial and budgetary matters are provided to CFSA management, and the senior management team of the Department to support their decision making processes. The Senior Budget Analyst will also be a contact for budget staff in Finance & Enterprise and Treasury Board.

Depending upon the nature and/or scope of an issue, initiative or project, the Senior Budget Analyst

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will consult and work with Department staff and external clients (e.g. First nations with off-reserve responsibilities, first nation delegated child welfare agencies) on initiatives.

The Senior Budget Analyst will participate at a working committee or team level on cross-government budget and financial project teams dealing with complex issues and initiatives that affect the Government as a whole, and particular the Ministry of Children and Youth Services.

The Senior Budget Analyst is also expected to participate in working level project groups working on new initiatives and programs that are developed and or delivered by the CFSAs. This is to ensure financial, and where applicable, administrative policies and requirements are communicated, understood and integrated into the initiatives and resolution developed by program areas and the CFSAs. This is also to help identify where other links may be needed or available (e.g. Service Alberta transactional services).

The Senior Budget Analyst will use initiative and creativity in developing new processes and methods to maximize the effectiveness and efficiency of services provided to a Ministry with a large and complex budget and accompanying financial issues. Creativity is required to lead the development of comprehensive schedules and tables to clarify and support financial information presentations and the development of innovative solutions to budget and financial issues. The Senior Budget Officer will also contribute to the development of Ministry standards, practices, and procedures relating to budget and fiscal management.

The Senior Budget Analyst will work within the parameters of budgetary and financial policies and guidelines followed by the Government of Alberta and the Ministry.

The Senior Budget Analyst will work with and mentor a Budget Officer in the Budgets and Analysis unit that will focus on budgeting and forecasting in the Department of Children and Youth Services, and be responsible for the development, maintenance, communication and understanding of funding allocation models used within the Ministry for allocating funds to the CFSAs.

Work is reviewed for the quality of recommendations and conclusions provided and for the extent that results meet the requirements of senior and executive managers, business areas, Finance and Enterprise, Treasury Board and other stakeholders. Work is performed under the general supervision of the Manager, Budgets and Analysis, and while some specific directions or instructions are provided, the position is required to demonstrate the ability to work independently, accurately, prioritize work to meet deadlines, and make sound decisions.

The Senior Budget Analyst is expected to discuss matters outside the scope of Budget and Analysis or involving significant impact on other Ministry functions with the Manager and/or the Director of Finance. Changes to or interpretation of policy are discussed with the Manager, Budgets and Analysis, and Major Budget issues, expenditure variances, and changes to financial reporting processes should be discussed with the Manager of Budgets and Analysis.

The Manager and Director are also available for assistance when dealing with particularly sensitive situations or Stakeholders. The Manager and/or Director also review complex analysis packages

coordinated by the Senior Budget Analyst prior to their being tabled with the Executive Team to ensure major assumptions are valid and goals and objective of stakeholders are met.

Knowledge, Skills and Abilities

(Diplomas, degrees and the most important knowledge factors, skills and abilities including knowledge about practical procedures, specialized techniques, etc.; analytical and conceptual skills and abilities; and skills needed for direct interaction with others. Specific training if it is an occupational certification/registration required for the job.)

The Senior Budget Analyst requires in-depth knowledge, acquired through the completion of a related degree or accounting designation such as CMS, CGA or CA and considerable progressively responsible experience in budgeting, accounting, financial reporting, of:

- Budgeting, financial administration, and financial forecasting and costing theories, techniques and processes.
- Preparation of complex financial statements and notes, including consolidated financial statements.
- Reporting and integrated financial information systems.
- Accounting concepts used in the public sector.
- Acts and related material on budgeting and financial administration within the Alberta Government (i.e. Financial Administration Act, government Organization Act, Government Accountability Act.)

The Senior Budget Analyst must have excellent:

- Analytical and problem solving skills.
- Verbal and written communication skills.
- Organizational and time management skills.
- Consultation and interpersonal skills.
- Problem solving and conflict management skills.

The Senior Budget Analyst must be able to:

- Effectively present and defend analyses, assumptions, options and conclusions to senior Departmental and CFSA staff.
- Provide consultation, guidance, and advice relating to budgets, financial administration and fiscal analysis to clients.
- Coach and mentor staff within the Budget and Analysis unit, the department and the CFSAs, to facilitate and ensure that transfer and development of budget, fiscal, and organization knowledge and skills.
- Conduct research and analyze data.

- Interpret legislation, guidelines, and Government Technical requirements for Ministry staff and stakeholders.
- Manage and prioritize demanding responsibilities given tight deadlines.
- Effectively use word processing and spreadsheet software (i.e. Word and Excel).
- Understand and work with large integrated financial system such as IMAGIS (a PeopleSoft based system).
- Work independently as well as contribute effectively in a team environment.
- Utilize initiative and creativity relating to assigned responsibilities.
- Work with, guide, and mentor a second budget office position in the Budget and Analysis unit.

Contacts


(Main contacts of this position and the purpose of those contacts.)

N/A

Supervision Exercised

(List position numbers, class titles, and working titles of positions directly supervised.)

N/A

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Last Review / Update: 2015-04-13

Opted out and Excluded Benchmark Evaluation - 512BO01

Identification Section

Working Title: Budget Analyst

Department: Human Services

**Division,
Branch/Unit:** Finance, Budgets and Forecasts

Reports To: Manager, HQ Support and Budgets and Forecasts Processes

Levels to D.M.: 4

Job Description: [512BO01](#)

MRS: See [Minimum Recruitment Standards](#) for Budget Officer

Job Code: 512BO - Budget Officer Level 2
(See [Opted out and excluded pay plans and salary ranges](#) – Schedule 1, Part 2-A)

[Organization Chart](#)
(requires login)

Evaluation

Knowledge

E+I2 230



Creativity/Problem Solving

38% 87



Responsibility

B 87



TOTAL JOB POINTS

404

Comments on Role

This position reports to the Manager, HQ Support and Budgets and Forecasts Processes and is accountable to the Assistant Deputy Ministers of Labour Standards and Workplace Safety (LSWS), Strategic Corporate Services (SCS), Immigration (IMM) and to the Chair of the Labour Relations Board (LRB). The position is responsible for administering the finances for those areas of the Ministry. This entails reviewing, analyzing and making recommendations regarding forecasts and budgets and providing costing of various proposals..

Comments on Evaluation

- **Knowledge:**

Content:

- **E+:** This position requires thorough knowledge of budgets and related aspects including financial administration, financial forecasting, and costing, as well as relevant legislation, regulations and policies. Required knowledge is acquired through completion of an

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applied accounting degree or diploma, combined with relevant experience. The position must also be very familiar with the programs and services delivered by the department, in order to ensure accuracy within the budgeting process. The push (+) on the E recognizes the role of this position as an expert consultant to a portion of the organization and the associated depth of specialized knowledge that is applied.

Complexity and Diversity:

- **I:** This position consistently applies a variety of analytical and conceptual skills in its work with three divisions of the department, plus the Labour Relations Board, as it provides expertise and support relating to budgets and forecasts.

Human Relations Skills:

- **2:** This position must interpret and explain budget/financial data to stakeholders and facilitate negotiations when budgets need to be realigned. Success in this role relies on influencing, as well as, solid consulting, facilitating and problem solving skills.

- **Creativity/Problem Solving:**

38%: The position applies expert knowledge in its consultation with a variety of stakeholders. This position has the latitude to work within a broad environment in which parameters are clearly defined. The Budget Analyst analyzes expenditure and caseload trends, program changes, forecasts and cash flow and then consults with division managers concerning any discrepancies. Solutions are generally found within the position's body of knowledge and experience.

- **Responsibility:**

B: The Budget Officer provides support to management in making budgetary decisions. This is viewed as primarily a consulting/advising role, relied upon for budget expertise.

Last Reviewed: November, 2009

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Last Review / Update: 2015-04-13

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Opted Out and Excluded Benchmark Job Description - 512BO01

Identification Section

Working Title:	Budget Analyst
Department:	Human Services
Division, Branch/Unit:	Finance, Budgets and Forecasts
Reports To:	Manager, HQ Support and Budgets and Forecasts Processes
Levels to D.M.:	4

Purpose

(Brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization.)

The primary purpose of this position is to advise, influence and support the preparation and management of divisional budgets and forecasts. The Budget Analyst is assigned to the division to be the primary source of financial information and advice.

Reporting to the Manager, Headquarters Support and Budgets and Forecasts Processes and accountable to the ADM Labour Standards and Workplace Safety (LSWS), the ADM of Strategic Corporate Services (SCS), the ADM of Immigration (IMM) and the chair of the Labour Relations Board (LRB), the incumbent is responsible for administering the finances for a portion of the Ministry – Labour Standards and Workplace Safety, Strategic Corporate Services, Immigration, and the Labour Relations Board. This entails reviewing, analyzing and making recommendations regarding forecasts and budgets. The position provides costing of various proposals and support to other ministries, the ADM, Executive Director and other division managers.

The position ensures that the Ministry meets its obligations under the Financial Administration and Government Accountability Acts by making timely financial analysis and reports. The financial information relating to their financial resources is provided to Executive Team, division managers and Alberta Treasury Board.

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Responsibilities and Activities

(Each end-result/responsibility shows what the job is accountable for, within what framework and what the added value is.)

- 1. In conjunction with the ADM and division directors, prepares the division budget and the element details for LSWS, SCS, IMM and LRB for the 3 year business plan. Once estimates are approved by Alberta Treasury Board, coordinates the budget allocation within the Divisions.**

Activities:

- Consolidates and reviews budget submissions for the Divisions for accuracy and completeness.
- Consults with Directors and Managers to gain additional information regarding the budget proposal.
- Reviews divisional budget proposal with ADMs and implements changes as required and forwards to Budgets Manager.
- Upon approval of budget proposal by Alberta Treasury Board, works with the ADM and Executive Directors to allocate the budget by branch, element and control group. Provides allocation scenarios to the ADM and Executive Directors as requested.
- Coordinates preparation of divisional templates by division managers for loading of budget into IMAGIS.
- Reviews and analyzes budget submissions by comparing to historical expenditure trends and through discussions with program areas regarding future program changes/trends. Provides recommendations where discrepancies occur.
- Revises budget submission based on recommendations of Executive Team.
- Completes Treasury schedules as required.
- Prepares element details for estimate book including control group breakdown and supporting historical information to support figures.
- Prepares supplementary analysis and briefing material for Minister's briefing book, including variance explanations.
- Reconciles Ministry budget load for the Divisions.

- 2. Prepares forecasts and cash flow analysis for Labour Standards and Workplace Safety (LSWS), Strategic Corporate Services (SCS), Immigration (IMM), and the Labour Relations Board (LRB).**

Activities:

- Consolidates forecast submissions and variance analysis from the divisional directors and prepares briefing material for the ADM's, Executive Team and the Ministry.
- Prepares analysis of expenditure trends and program changes. Reviews forecasts and cash flow for accuracy and completeness. Consults with division directors if

- discrepancies appear.
- Maintains an understanding of trends and analyzes reasonableness of monthly cash flow estimates.
- Provides monthly cash flow/forecast feedback to ADM and divisional Managers.
- Identifies cost pressures and provides recommendations for cost containment, if appropriate.
- Prepares Ministry variance explanations for programs and divisions, as necessary.

3. Provides a financial consulting service to the ADM and Executive Directors' offices, as well as program directors/managers.

Activities:

- Works closely with ADMs, Executive Directors and directors/managers on a daily basis to ensure divisional forecasting and budgeting requirements are met.
- Acts as a contact for the Alberta Treasury Board, Spending Management and Planning Analyst relating to financial impact of program and policy issues, quarterly forecasts and budget requests for assigned divisions.
- Allocates funds by program and control group. If needed, facilitates negotiations for budget realignments.
- Provides briefing material and variance explanations for assigned divisions, for annual Public Accounts to the Minister and Alberta Treasury Board.
- Reviews expenditures and Public Accounts for accuracy.

4. Provides expertise in finance, budgets and system maintenance.

Activities:

- Provides financial analysis and costing of various policy and financial proposals for division and ministry, using various budgets and forecast approaches.
- Provides direction and advice to Division staff implementing the ADM's decisions.
- Attends meetings relating to the assigned Division and programs. Participates in the division senior management team meetings as the finance/budget representative.
- Ensures the completeness and overall accuracy of financial systems.
- Prepares briefing papers and responses to issues as they arise.
- Reviews draft regulations or Ministerial Requests for budget and program implications.
- Reviews proposed program changes to determine possible financial impacts and to determine if the projected amounts are reasonable.
- Ensures IMAGIS reporting trees are accurate for division and ministry.
- Represents the Finance division on various committees.
- Completes other projects as assigned by Budgets and Forecasts Manager.

5. Responsible for preparing the Ministry budget documents during the annual budget

preparation process.

Activities:

- Co-ordinates the gathering and compilation of the budget figures to complete schedules, tables and Ministry budget estimate documents.

Scope

(Illustrates what internal or external areas the job impacts, and the diversity, complexity, and creativity of the job.)

The Ministry's budget exceeds \$850 million and presently consists of approximately 11 divisions and entities. Budgets and forecasts are required at all levels of the Ministry. The shared service approach under government reorganization has increased the complexity of accounting and budgeting.

The budgets for Labour Standards and Workplace Safety (LSWS), Strategic Corporate Services (SCS), Immigration (IMM) and the Labour Relations Board (LRB) programs are spread across 6 of the Ministry's 8 voted programs – Ministry Support, Employment, Labour Standards and Workplace Safety, Immigration, and Labour Relations and Adjudication. It is essential that the analyst be familiar with the services and programs delivered by the division to ensure accuracy of forecasting and budgeting.

The dynamics and complexity of programs coupled with various delivery structures, require the analyst to have wide latitude in completing analyses and submissions.

The IMAGIS system is large and reporting is complex. This position reviews Program Reporting and Organization Trees to ensure accurate reporting and properly working systems.

Knowledge, Skills and Abilities

(Diplomas, degrees and the most important knowledge factors, skills and abilities including knowledge about practical procedures, specialized techniques, etc.; analytical and conceptual skills and abilities; and skills needed for direct interaction with others. Specific training if it is an occupational certification/registration required for the job.)

- Comprehensive knowledge of government and accounting principles is required. Examples include treatment of accruals and amortization, and government policies on inter-ministry

billings.

- Excellent communication skills are required and the ability to work well with various levels of staff within the division or other ministries. The Budget Analyst provides staff with approaches and tools in preparing forecasts such as reports and variance analyses and then assesses the reasonableness of the forecast. The position must be able to challenge the results and communicate their assessment and recommendations to the Executive Team member.
- The position requires formal training (eg. CGA, CMA designation) in finance or accounting or a related university degree. Several years experience in budgeting or accounting functions is required. This knowledge and skill is enhanced with a thorough understanding of government policies and procedures which allow the budget analyst to support the division on financial issues.
- Experience in working with large databases and understanding interrelationships between systems is essential. The position provides advice and direction on the use of the financial systems eg. IMAGIS Budget Module. The position requires skill in working with a variety of software such as Excel, nVision, Query and the ability to design layouts for reports and problem solve.
- The ability to work well under stress to meet short deadlines is also necessary. The position may lead or coordinate various initiatives.

Contacts

(Main contacts of this position and the purpose of those contacts.)

Clients	Frequency	Nature and Purpose of Contact
Internal		
Assistant Deputy Ministers	Bi-weekly or as required	Update and advise ADMs on current financial and operational issues.
Senior Management Team members	Bi-weekly or as required	Regular meetings to discuss issues and activities of the Division.
Managers and Program Planners	As required	Member of advisory groups or working groups or one-on-one to provide subject matter expertise.
External		
Other ministry representatives	As required	Member of cross divisional committees or one-on one to provide subject matter expertise and share best practices eg. IMAGIS EPM; Reporting

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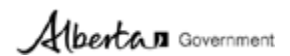


		Working Group, Shared Service Agreements.
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Supervision Exercised

(List position numbers, class titles, and working titles of positions directly supervised.)

N/A



Last Review / Update: 2015-04-13

Opted out and Excluded Benchmark Evaluation - 512BO02

Identification Section

Working Title: Budget Officer

Department: Service Alberta

Division, Branch/Unit: Financial Services, Corporate Finance/Corporate Financial Management

Reports To: Senior Budget Analyst, Budget Officer 3

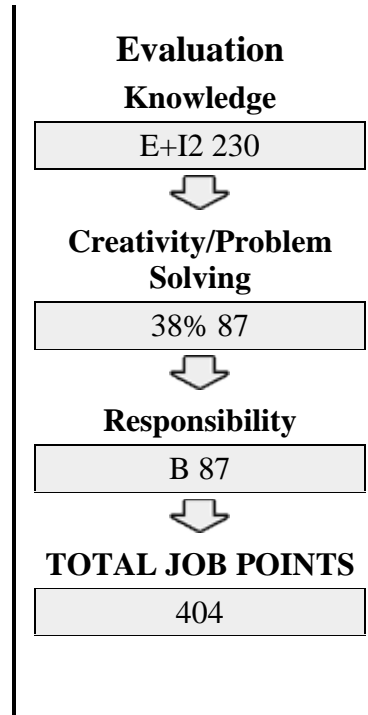
Levels to D.M.: 5

Job Description: [512BO02](#)

MRS: See [Minimum Recruitment Standards](#) for Budget Officer

Job Code: 512BO - Budget Officer Level 2
(See [Opted out and excluded pay plans and salary ranges](#) – Schedule 1, Part 2-A)

[Organization Chart](#)
(requires login)



Comments on Role

The Budget Officer plays an integral role in the financial management and guidance of their assigned portfolio. The position provides consultative services on matters pertaining to budget proposals and forecasts, development or improvement of internal financial guidelines and the organization of their financial structure. A sound understanding of the business of the portfolio along with strong communication abilities is required to facilitate discussions around solutions to business problems and their resulting impact on budgetary constraints. Other duties include training portfolio staff on budget related issues, completing budget transfers and developing briefing materials.

Comments on Evaluation

- **Knowledge:**

Content:

- **E+:** The position requires sound knowledge of accounting and budget principles gathered through a university degree and subsequent accounting designation. A thorough understanding of applicable government financial policies and procedures as well as

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financial reporting elements is required in the application of the accounting knowledge. The push (+) recognizes the breadth and depth of professional and accounting knowledge supplemented with the budget proposals and forecasting expertise for its assigned portfolio.

Complexity and Diversity:

- **I:** The position requires an understanding of their portfolio's business and must have the ability to relate and determine budgetary impacts on the business in order to provide effective advice.

Human Relations Skills:

- **2:** The clients within the position's portfolio are often not budget and/or financial experts. As a result, the position must be able to effectively provide technical information to non-technical users in an effective manner. Persuasion is also required when presenting viable solutions to business issues and when guiding the development or improvement in internal financial procedures or guidelines.

- **Creativity/Problem Solving:**

38%: The Budget Officer is responsible for providing expert professional advice and guidance to a portfolio with a diverse and complex business. It is most often guided by various government financial policies and procedures and its own body of knowledge in determining financial solutions and appropriate courses of action for their clients. The Budget Officer is often required to review and improve internal financial procedures and guidelines to allow improvements in overall portfolio fiscal management.

- **Responsibility:**

B: The position provides budgetary and financial consultative services to its portfolio. The Budget Officer is also called upon to analyze financial situations and develop corresponding solutions.

Last Reviewed: November, 2009

Alberta Government

Last Review / Update: 2015-02-06

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Opted Out and Excluded Benchmark Job Description - 512BO02

Identification Section

Working Title:	Budget Officer
Department:	Service Alberta
Division, Branch/Unit:	Financial Services, Corporate Finance/Corporate Financial Management
Reports To:	Senior Budget Analyst, Budget Officer 3
Levels to D.M.:	5

Purpose

(Brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization.)

Reporting to the Senior Budget Analyst, the incumbent provides executive management and line managers with budgetary information and analysis, financial analysis and management reports to ensure the ongoing and changing needs of Service Alberta and our customers are met.

This includes responsibilities for ensuring the accuracy of financial analysis and information, conducting necessary reconciliations and investigations, and resolving financial variances and business process issues.

Responsibilities and Activities

(Each end-result/responsibility shows what the job is accountable for, within what framework and what the added value is.)

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1. **Within their assigned portfolio, the Budget Officer ensures that the annual appropriation is managed effectively through review, analysis and reporting of budget, forecasts and actual expenditures.**

Activities:

- Provides information, interpretation or instructions, gives assistance in preparation of budget proposals and forecasts.
- Reviews budget and forecast submissions for accuracy and completeness.
- Sampling forecast submissions.
- Consults with the client to gain additional knowledge of the budget proposal and forecast information.
- Prepares supplementary analysis and makes recommendations as necessary.
- Prepare briefing material for management review – scheduled and/or ad hoc reporting.
- Ensure accuracy of the estimates through trend analysis and other forecasting tools.
- Provide clients with actual/forecast reports once numbers have been analyzed and verified.
- Provides instructions to clients as to the information needed and the timelines.
- Runs different queries in IMAGIS.
- Adjusts budget entries, provides estimations using a series of estimation techniques and performs analysis to get a trend.
- Support the publication of the forecasting tool (IMAGIS Budget Module).
- Support the completion of the submissions for Cabinet Policy Committee, Public Accounts and Treasury Board/Alberta Finance.

2. **Provides an advisory and consultative service to the clients.**

Activities:

- Assists clients in organizing their financial structure, organizational codes and financial codes.
- Provides advice and guidance to management at all levels and worksites on financial information to assist them in planning and controlling their operations.
- Resolving program area queries.
- Advocate for the assigned portfolio within Corporate Finance.
- Working with other areas within Corporate Finance to present program areas with viable solutions to business issues taking into consideration the proposed solutions impact on the program areas' budget.
- Provides advice and guidance in the development or improvement of financial procedures.
- Provides the appropriate training resources for portfolio on forecasting techniques and tools.
- Works with the program areas to identify and affect budget transfers.

Scope

(Illustrates what internal or external areas the job impacts, and the diversity, complexity, and creativity of the job.)

- This position has the responsibility for the budget and forecasting process for an assigned portfolio.
- There is complexity in the process required to extract data from different sources and databases ensuring accuracy and timeliness of the information.
- There is complexity in the budget and forecasting aspect as each Division has its own uniqueness and challenges in delivering its program mandate.
- Must show flexibility between portfolio needs and legislative requirements while still adhering to generally accepted accounting practices.

Knowledge, Skills and Abilities

(Diplomas, degrees and the most important knowledge factors, skills and abilities including knowledge about practical procedures, specialized techniques, etc.; analytical and conceptual skills and abilities; and skills needed for direct interaction with others. Specific training if it is an occupational certification/registration required for the job.)

A university degree in Commerce, with an Accounting or Finance Major. Job requires near completion of an accounting designation such as CMA, CGA, CFA, or equivalent. Must have at least two years accounting experience and experience in preparing budgets and financial statements in either government or a private company. Knowledge of the principles of budgeting and how budgets are allocated is essential. Understanding of the government policies, program procedures, financial guidelines and legislation is highly desirable.

Experience in working with people, negotiating skills, and excellent communication skills are required. Computer skills, including excellent skills in Excel. Knowledge of IMAGIS or some other corporate financial system. Able to manage multiple projects and changing deadlines.

Contacts

(Main contacts of this position and the purpose of those contacts.)

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- Corporate Finance and Portfolio personnel – Determine and seek clarification of process/business requirements. Training personnel on budget and forecasting techniques and tools.
- GoA Finance Community – to present and gauge best practices to the Community aimed at increasing the effectiveness of financial reporting within Service Alberta.

Supervision Exercised

(List position numbers, class titles, and working titles of positions directly supervised.)

N/A

Alberta  Government

Last Review / Update: 2015-02-06

Opted out and Excluded Benchmark Evaluation - 512BO03

Identification Section

Working Title: Regional Budget Officer

Department: Human Services

**Division,
Branch/Unit:** Central Children and Family Services Authority

Reports To: Finance Manager

Levels to D.M.: 4

Job Description: [512BO03](#)

MRS: See [Minimum Recruitment Standards](#) for Budget Officer

Job Code: 512BO - Budget Officer Level 2
(See [Opted out and excluded pay plans and salary ranges](#) – Schedule 1, Part 2-A)

[Organization Chart](#)
(requires login)

Evaluation

Knowledge

E+I2 230



Creativity/Problem Solving

33% 76



Responsibility

B 76



TOTAL JOB POINTS

382

Comments on Role

The Minister of Children and Youth Services appoints a board of community members to govern each Child and Family Services Authority (CFSA). Legislation, along with a memorandum of understanding and an annual business plan approved by the Minister, guides activities for each Board. Each Region is headed by a Chief Executive Officer (CEO). CFSAs are delegated by Children and Youth Services to provide a wide range of services to strengthen families and keep children and youth safe and protected. The Boards are agents of the Crown and have a responsibility to be open, transparent and accountable to the public. Each year each Board releases a Business Plan and Annual Report to the public. The Board's policies and decisions are implemented by the CFSA's CEO, who also manages the daily operations of the CFSA and ensures the regional system runs effectively. Under the direction of the Board, each Authority is responsible for the preparation of the annual report, including financial statements and performance results, and is responsible through the CEO for the adequacy of the financial administration and reporting functions, including maintaining systems of financial management and internal control. Central Alberta Child & Family Services is one of 10 CFSAs in Alberta with a budget of \$65M.

The position is responsible for providing comprehensive forecast, budget and financial analysis and consulting services to ensure the needs of the Authority and Ministry are met. Role provides leadership and direction to Authority managers in regards to financial information and responsibilities.

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Comments on Evaluation

- **Knowledge:**

Content:

- **E+:** The Regional Budget Officer requires professional accounting knowledge including forecasting, costing and budget concepts acquired through diploma, degree or 4th year registration in formal accounting program supplemented by considerable experience in budgeting, forecasting, and financial reporting. Knowledge of government financial policies, procedures and practices, financial systems and in particular budgeting within the GoA and related budget and forecast tools, Generally Accepted Accounting Practices (GAAP), legislation (FAA, CYFE Act) and Ministry and Regional requirements. A working knowledge of the financial aspect of all programs and services delivered (e.g. understand caseload and cost per case projections) within the Region in order to apply to budgeting and forecasting and variance reporting. Requires a good working knowledge and understanding of financial controls, monitoring, forecasting, costing and budget concepts. The PUR is the Regional expert in planning/analysis functions for budgeting/forecasting. The push (+) recognizes this specialist role requires both the breadth and depth of professional accounting and financial knowledge supplemented with expertise in budgeting and forecasting specific to a Region.

Complexity and Diversity:

- **I:** Works with all staff within the Region plus with external stakeholders and other parties, Ministry level financial areas, and external/internal auditors providing comprehensive financial services requiring a complete understanding of budget and forecasting as it relates to the Region and within Ministry. Must have a full awareness of the budgeting cycle and the regional business plans and strategic directions in order to complete work assignment.

Human Relations Skills:

- **2:** Role provides consultation to a diverse range of people ranging from technical exchange of information – gathering, clarifying, exchanging, explaining typically with those of similar knowledge base, to consultation, recommendation and interpretation of complex financial concepts and processes to senior manager to senior administrative staff in the region and stakeholders, having direct influential impact including influencing decision making and/or opinion. Role requires considerable skill in the interpretation and provision of understanding of the needs of government and Ministry accounting/budgeting requirements.

- **Creativity/Problem Solving:**

33%: PUR applies expert knowledge in budgeting/forecasting and financial accounting to the diverse/varied issues and situation presented within the Region managers and staff with the solutions

found within the application of the body of knowledge (expertise). Must balance strategic needs and demands within the Region with the budgeting and forecasting providing senior management with recommendations applying knowledge and past experience. Problems/ situations encountered are not 'standard' and require the role to clarify the issue/concern and use professional judgment to address variable presenting problems choosing the most applicable/appropriate response or developing options considering the impact. Position develops and/or participates in developing new and/or enhanced operational processes.

- **Responsibility:**

B: Role provides professional financial budget, reporting and forecast support to the regional programs and consultation and advice to management, staff and stakeholders.

Last Reviewed: November, 2009



Last Review / Update: 2015-04-13

Opted Out and Excluded Benchmark Job Description - 512BO03

Identification Section

Working Title:	Regional Budget Officer
Department:	Human Services
Division, Branch/Unit:	Central Children and Family Services Authority
Reports To:	Finance Manager
Levels to D.M.:	4

Purpose

(Brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization.)

Reporting to the Manager of Finance, this position is responsible for the provision of comprehensive financial planning, projection, budget, analysis and consulting services to ensure the needs of Region 4, Central Alberta, CFSA and Ministry are met. This position also holds the responsibility of cover-off of the Manager of Finance and the Financial Analyst.

Responsibilities and Activities

(Each end-result/responsibility shows what the job is accountable for, within what framework and what the added value is.)

1. Prepare, Monitor and provide Recommendations of Authority budget and targets

Activities:

- Coordinate Ministry requests for Authority budget information. This position will review information requests from the Ministry, and assess workload, requirements for

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completion, and assign deadlines.

- Prepare and recommend scenarios for the allocation of the Authority budget to the Management Team. These recommendations will be based on current business direction and historical spending patterns as analyzed by the incumbent.
- Coordinate and prepare worksite budget allocations based on direction from the Manager of Finance as requested during the fiscal year.
- Reconcile worksite budgets to ensure transfers between worksites are accurate during the fiscal year, as authorized by the Manager of Finance.
- Monitor spending against budget to provide timely feedback to the Board and Management Team for direction and resource allocation.

2. Coordinate and Recommend/Provide tools for financial projection activities

Activities:

- Investigate and recommend enhancements to current projection methods to increase the productivity/accuracy of the Authority's management reporting based on feedback from the worksites and the Ministry as a whole.
- Liaise with the Ministry and other CFSA's on Budget/Projection issues.
- Coordinate Ministry requests for the Authority projections as required.
- Coordinate and analyze expenditure projections submitted from worksites for accuracy and/or major variances.
- Provide leadership and direction to the Office Administrators and Managers in regards to the projection. budget and statistical requirements of the Authority.
- Recommend Authority adjustments to worksite submissions to provide timely projection information to the Authority and the Ministry.

3. Provide appropriate budget, projection and statistical information:

Activities:

- Prepare, analyze and distribute reports for the CEO, CEO Advisory team, and the Regional Management Team.
- Prepare financial and statistical information for the Annual Report and the three-year business plan.
- Complete expenditure projections for the Authority, Board and Audit Committee as required.
- Provide supplementary information and explanations to the Auditor General/representative in relation to completion of the statutory audit.
- Prepare comparative and special information reports for the Authority and the Ministry including appropriate explanations.

4. Other responsibilities:

Activities:

- Provide regular direction with regards to financial information and responsibilities to the Office Administrators.
- Prepare ad-hoc financial analysis, as directed by the Manager of Finance.
- Assist in preparation of policy recommendations, development of procedures, and improvement of managerial reporting.
- Provide interpretations and recommendations of managerial accounting principles.
- Ensure the Manager of Finance is kept informed of issues which may require attention or guidance.
- Provide feedback and information to members of the Financial Unit in a timely manner.
- Provide primary cover-off of the Manager of Finance and the Financial Analyst duties as required.
- In-directly supervise the Finance Admin Supervisor who assists the Budget Officer with monthly projections and other assigned duties.

Scope

(Illustrates what internal or external areas the job impacts, and the diversity, complexity, and creativity of the job.)

Responsible for all aspects of the Region's coordination and managerial reporting of budgets and projections, the incumbent must use creative problem solving to develop budget and projection scenarios or changes on a short time frame, and to provide timely, informed recommendations to the Authority on all matters related to the budget and projection functions. This position performs a wide variety of financial and statistical analysis requiring a sound accounting knowledge and a solid understanding of the programs delivered within the region, and the unique characteristics of each worksite.

Knowledge, Skills and Abilities

(Diplomas, degrees and the most important knowledge factors, skills and abilities including knowledge about practical procedures, specialized techniques, etc.; analytical and conceptual skills and abilities; and skills needed for direct interaction with others. Specific training if it is an occupational certification/registration required for the job.)

- Knowledge of accounting policies, principles, procedures, and government financial systems
- Knowledge of Financial Administration Act, Regulations, Policies, Programs and procedures of financial systems and related activities as well as other government financial and accounting policies
- Knowledge of financial aspects of all regionally delivered Ministry programs
- Knowledge of Ministry and provincial mainframe systems, including, but not limited to: IMAGIS, Child, Youth Family System, Family Support for Children with Disabilities Information System, Child Care Information System, Contract Management Administration System, Child Youth Support Information Module, Child Youth Information Module and Infomart
- Knowledge of generally accepted accounting principles
- Knowledge of financial controls, monitoring, projecting, costing and budgeting concepts
- Ability to exercise professional judgment
- Leadership skills
- Ability to train staff
- Strong client focus
- Proven ability to consult, collaborate, and bring about change through consensus
- Analytical decision making and organizational skills
- Communication (verbal and written), interpersonal and negotiation expertise
- Ability to communicate complex financial concepts to both financial and non-financial staff
- Advanced computer skills particularly with Word and Excel as well as a familiarity with Internet and Outlook
- Ability to work independently as well as part of a team
- University graduation in a related field plus four years related experience or an equivalent combination of education and experience which includes as a minimum, completion of a recognized applied accounting degree or diploma program

Contacts

(Main contacts of this position and the purpose of those contacts.)

Positions deals with a broad range of contacts including:

- Corporate finance, IT and analysis staff
- Budget Officers and finance staff within other Authorities
- Regional Office Administrators and Managers
- Internal and external audit staff.

Supervision Exercised

(List position numbers, class titles, and working titles of positions directly supervised.)

N/A



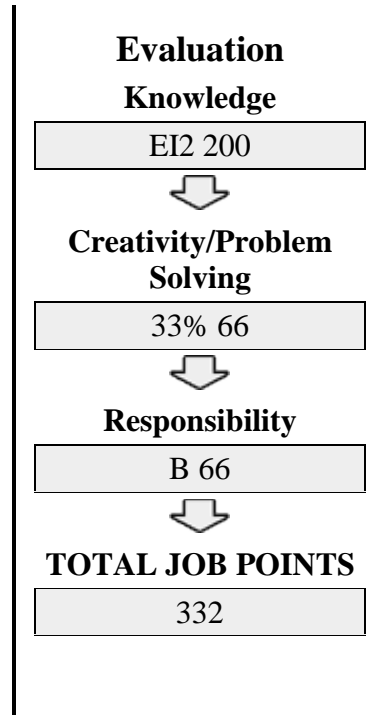
Last Review / Update: 2015-04-13

Opted out and Excluded Benchmark Evaluation - 511BO03

Identification Section

Working Title: Budget Analyst
Department: Advanced Education
Division, Branch/Unit: Corporate Services/Financial Planning
Reports To: Manager 2, Budgets
Levels to D.M.: 5
Job Description: [511BO03](#)
MRS: See [Minimum Recruitment Standards](#) for Budget Officer
Job Code: 511BO - Budget Officer Level 1
 (See [Opted out and excluded pay plans and salary ranges](#) – Schedule 1, Part 2-A)

[Organization Chart](#)
 (requires login)



Comments on Role

The Budget Analyst, as part of a team of Budget Analysts works to ensure the completion of timely, accurate budgets, forecasts, and cash flow estimates to support the Ministry’s Executive Committee decision making and to support the Ministry submissions to Alberta Treasury Board and Alberta Finance & Enterprise. The Budget Analyst ensures fiscal planning is performed in compliance with the Government Accountability Act (GAA) and Financial Administration Act (FAA). The Budget Analyst supports the Senior Financial Officer and the Financial Planning Branch with their stewardship role in this area.

Comments on Evaluation

- **Knowledge:**

Content:

- **E:** The position requires working knowledge and understanding of budgets, cash flow estimates and forecasting. The position is not required to possess an in depth understanding of budgets and financial forecasting within the department as it has access

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to assistance to senior budget officers and manager. The position is at the entry level and requires considerable expertise but within a very clearly defined area. The E profile reflects the working knowledge in budgets and financial reporting related topics. The position is not rated an E+ as it does not complete tasks independently, and does not require the ability to successfully apply the theoretical knowledge to the entire area of budgets and financial forecasting.

Complexity and Diversity:

- **I:** The position handles inquiries from clients on a regular basis. The position needs to know where their work comes from and fully understand how it affects others. The position interacts with the other Budget Analysts and various external stakeholders in providing them with expertise in budgets and financial reporting and is considered a professional position. The position possesses understanding of budgets and is the primary contact for system questions.

Human Relations Skills:

- **2:** The position is the primary contact and consults with one of the Ministry's program delivery divisions. The position interprets technical budget and financial reporting data for external clients. In addition to the ongoing interaction with clients, the position assists in training on budget related issues.

- **Creativity/Problem Solving:**

33%: The position works within already developed procedures and is not required to complete job tasks by extracting knowledge from outside the possessed body of knowledge. Position relies on its base theoretical knowledge and principles with solutions found within the application of that body of knowledge.

- **Responsibility:**

B: The position focuses on providing support to clients who are the end users of the information, coordinates the training initiatives, and aids in the delivery of advisory and supportive services including analyzing financial statements, preparing budget related information and running queries.

Last Reviewed: November, 2009

 Alberta Government

Last Review / Update: 2016-03-11

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 Alberta

Opted Out and Excluded Benchmark Job Description - 511BO03

Identification Section

Working Title:	Budget Analyst
Department:	Advanced Education
Division, Branch/Unit:	Corporate Services/Financial Planning
Reports To:	Manager 2, Budgets
Levels to D.M.:	5

Purpose

(Brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization.)

Reporting to the Budgets Manager, the Budget Analyst works with a team of Budget Analysts to ensure the completion of timely, accurate budgets, forecasts, and cash flow estimates to support the Ministry's Executive Committee decision making and to support the Ministry submissions to Alberta Treasury Board and Alberta Finance.

The Budget Analyst accomplishes their role by ensuring that fiscal planning is performed in compliance with the Government Accountability Act (GAA) and Financial Administration Act (FAA). The Budget Analyst supports the Senior Financial Officer and the Financial Planning Branch with their stewardship role in this area.

The Budget Analyst must have a strong understanding of Financial Accounting, Generally Accepted Accounting Practices (GAAP) and Public Sector Accounting Board (PSAB) standards.

Responsibilities include:

- Compiling and analyzing budget and forecasting information.

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- Being the primary contact and consulting with one of the Ministry's program delivery divisions for budgeting, forecasting and cash flow activities.
- System administration, coordination of training activities, and report delivery for the Ministry's Financial Reporting Systems to support Ministry and Government of Alberta budgeting, forecasting and cash flow activities.
- Completing budgeting and forecasting documents for presentation to the Ministry's Executive Committee.
- Coordinating the payment process for grant programs in support of the Adult Learning Division and Apprenticeship and Industry Training Division.

Responsibilities and Activities

(Each end-result/responsibility shows what the job is accountable for, within what framework and what the added value is.)

The Finance and Administration Division provides financial and accounting expertise to the Ministry's divisions, branches and subsidiaries. Working with a team of Budget Analysts within the Financial Planning Branch of Corporate Services Division, a Budget Analyst has the following responsibilities:

1. Budgeting

Activities:

- Review Divisions/Branches' submissions for completeness and accuracy in the development of initial budget allocations.
- Liaise between Financial Planning, and Divisions/Branches to develop final budget allocations and, as part of the Financial Planning Team, present the budget structure and allocation for final approval by the Ministry's Executive Committee.
- Accurately allocate budget information in the Budget Ledger and revise budget allocations in response to approved changes during the fiscal year.

2. Forecasting and Cash Flow Analysis

Activities:

- Evaluate and report on financial performance compared to prior year and budget allocations. This includes using methods such as trend analysis, investigating variances to be presented to the Manager, Financial Planning, and the Director, Financial

Reporting.

- Maintain formal expenditure review process. • Work with Divisions/Branches to identify Spending Pressures.
- Provide information/training sessions to program area staff to:
 - identify and recommend reports to aide in decision-making; and/or
 - for budget, forecast and cash flow processes and systems that support those processes.

3. **Fiscal / Business Plan**

Activities:

- Assist/coordinate the preparation of business and fiscal plan call packages.
- Provide technical support to Divisions/Branches in the formulation of their fiscal plans as well as financial based performance measures.
- Prepare documentation to support financial information presented to Cabinet Policy Committee, Committee of Supply and Public Accounts.

4. **IMAGIS & COGNOS Reporting**

Activities:

- Undertake System Administration to support user access, accurate reporting, and timely report delivery for both IMAGIS and COGNOS.
- Primary contact for program users for the COGNOS reporting tool.
- Provide information sessions and training to program area staff for IMAGIS and COGNOS reporting.
- Represent the Ministry on on-going IMAGIS production and reporting initiatives, i.e., Budget User Group.

This Budget Analyst position has specific responsibilities for:

1. **Coordinate Grant Payment Process (Back-Up & Vacation Cover Off) – Approximately one month/year**

Activities:

- Ensure appropriate coding of grants based on agreements/letters received from Adult Learning Division and Apprenticeship and Industry Training Division.
- Track grant payments for assigned programs for forecast and cash flow purposes.
- Support Financial Reporting requirements for Grant disclosure in schedules to Financial

Statements.

2. Manpower (Back-Up & Vacation Cover Off) – Approximately one month/year

Activities:

- Monitor Full Time Equivalent (FTE) Usage by Ministry.
- Track division/branch FTE allocations.
- Calculate Ministry achievement bonus accrual based on Corporate Human Resource policy.

Scope

(Illustrates what internal or external areas the job impacts, and the diversity, complexity, and creativity of the job.)

The Budgets Manager and the Director, Financial Planning rely upon the review and the analysis completed by the Budget Analyst to assess the Ministry's ability to meet its spending targets. The Budget Analyst's timely, complete analysis and reporting comes from constant interaction with Division/Branch heads and other program area personnel.

The Budget Analyst's reports and analysis form the basis for the Senior Financial Officer's financial discussions at Ministry Executive Committee meetings.

The forecast compiled, reviewed and analyzed by the Budget Analyst is the source for the Ministry's Quarterly Forecast Update sent to Alberta Treasury Board and to Alberta Finance for inclusion in the Government of Alberta's Quarterly reporting. The monthly cash flow submission to Alberta Treasury Board and Alberta Finance are supported by the Budget Analyst's contributions to the Ministry process for compiling cash flow estimates.

The budget documents compiled, reviewed and analyzed by the Budget Analyst form the source data for Ministry's Fiscal Plan.

Knowledge, Skills and Abilities

(Diplomas, degrees and the most important knowledge factors, skills and abilities including knowledge about practical procedures, specialized techniques, etc.; analytical and conceptual skills and abilities; and skills needed for direct interaction with others. Specific training if it is an

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occupational certification/registration required for the job.)

- Communication and interpersonal skills
- Time management and organizational skills
- Ability to work independently.
- Strong analytical and research skills.
- Experience with:
 - general budgeting concepts
 - general forecasting concepts
 - trend analysis methodologies.
- Proficiency with MicroSoft Excel, Word and IMAGIS.
- University graduation in Business with a focus on Accounting or Finance and no experience required.

Contacts***(Main contacts of this position and the purpose of those contacts.)***

Clients	Frequency	Nature and Purpose of Contact
Internal		
Manager, Budgets	Daily	Primary supervisor. Obtain general direction and guidance and receive specific assignments and performance evaluation.
Senior Financial Officer and Director, Financial Planning	Frequently	Support effective and timely strategic decisions through provision of information, analysis, and recommendations. Provide advice, direction and interpretation of Ministry/GOA Financial Legislation, Regulations, Policies and Practices.
Divisional Budget Contacts and EOs, Budget Team members and Corporate Services staff members	Daily	Consult and collaborate on financial planning matters with stakeholders and co-workers to achieve Ministry goals.
External		

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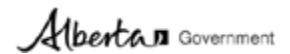


Consultant and people in corresponding positions in other ministries	Monthly	Troubleshoot Cognos issues and keep the application updated.
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Supervision Exercised

(List position numbers, class titles, and working titles of positions directly supervised.)

This position does not directly supervise other positions.



Last Review / Update: 2016-03-11