

**NON-MANAGEMENT JOB DESCRIPTION
POINT RATING EVALUATION PLAN**

Working Title Case Manager, Annexation		Name	
Position Number	Reports to Position No., Class & Level Director/SM1	Division, Branch/Unit Land and Property Rights Tribunal	Ministry Municipal Affairs
Present Class Program Services 5 (PS5)		Requested Class	
Dept ID	Program Code	Project Code (if applicable)	

PURPOSE: Give a 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 (see Non-Management Job Description Writing Guide [Pages 7-8](#)).

This position is responsible for overseeing case management of annexation applications, of a quasi-judicial Tribunal that decides matters of importance to municipalities, rural landowners, property owners, energy companies and the Government of Alberta. The Land and Property Rights Tribunal is the product of the amalgamation of four separate boards that each had separate mandates. Decisions of the Tribunal are final unless overturned by the Court of King's Bench or the Court of Appeal. Although the Tribunal reports to the Minister of Municipal Affairs, it operates at arms-length to the Ministry.

The Tribunal's mandate is to provide timely, fair, and independent appeal processes and proceedings, consistent with relevant legislation, rules, guidelines, and the principles of natural justice. The Tribunal's diverse jurisdiction includes property assessment, surface rights, expropriation, and land use planning matters. Each of these areas has its own legislation and process requiring tailored operational leadership. Tribunal decisions impact all Albertans as stakeholders to Tribunal proceedings can include the GoA, municipalities, rural landowners, property owners and energy companies.

Reporting to the Director-, Hearings and Training, the Case Manager, Annexation is responsible for advanced case management of complex annexation applications. -The Case Manager is regarded as the provincial expert within the assigned area of specialization and is responsible to ensure timely, independent, quasi-judicial adjudications are conducted in a manner that results in fairness and equity consistent with the authority of the legislation, principles of administrative law and the rules of natural justice. The case manager is expected to act independently in the majority of activities but also to work as part of an interdisciplinary team as required and directly with board members.

This position is also responsible for supporting and promoting a positive workplace culture based on the established Government of Alberta (GoA) core values. This position promotes a culture of continuous improvement and innovation by supporting initiatives such as Lean Six Sigma projects designed to ensure effective business solutions promoting high quality and highly efficient outputs.

RESPONSIBILITIES AND ACTIVITIES: The purpose of the job can be broken down in different responsibilities and end results. Each end result shows what the job is accountable for, within what framework and what the added value is. Normally a job has 4-8 core end results. For each end result, approximately 3-6 activities should be described (see Writing Guide [Pages 9-10](#)).

1. The Case Manager provides case management leadership and direction to applications and disputes relative to their area of specialization to ensure consistent application of the legislation to resolve the disputes/appeals in a timely manner.- This involves:
 - Leading the development and coordination of a process to facilitate the identification, refinement and resolution of issues prior to the application reaching the appeal board.

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- Leading discussions with the parties to the complaints/appeals to negotiate agreement on the appeal process.
 - Providing guidance and advice to the parties from the initial filing through to the hearing.
 - Resolving scheduling conflicts, coordinating exchange of information, coordinating preliminary hearings, and facilitating hearing settings.
 - Facilitating the review of appeal materials by the boards to ensure a thorough understanding of the appeal.
 - Facilitating decision meetings with panel members to help ensure board decisions are supported by sound reasons, following the decision model process.
 - Providing advice and guidance regarding the drafting of decisions to ensure conformity to the principles of administrative law and legislation, and are founded on evidence presented.
 - Travel throughout the province and coordinate the appeal panels in various locations.
 - Developing and maintaining multidisciplinary resources to support the Tribunal hearings (lawyers, expert witnesses on assessment, planning, property valuation, engineers, etc.)
2. The Case Manager is responsible for managing threats to reduce the likelihood of a conflict or incident from occurring at hearings, in some cases attended by complex clients.- This involves:
- Advising and/or briefing board members and staff on known or perceived threats concerning parties who are scheduled to attend a hearing.
 - Recommending and establishing safety protocols or other deterrents (e.g. security officer) for hearings, when warranted.
 - Designing an appropriate layout of hearing rooms to facilitate a safe hearing environment for hearing attendees, staff, and board members.
 - Managing complex clients through using de-escalating methods and procedures as required.
3. This position is responsible for drafting complex board orders based on the recommendation of the panel.- This includes:
- Ensuring draft board orders are clear, concise and grammatically correct.
 - Ensuring draft board orders are completed on a timely basis, as prescribed by legislation or target timelines established by the case manager and the Director, Hearings and Training.
 - Ensuring all annexation recommendations – which are submitted to the Minister of Municipal Affairs for Cabinet decision – reflect the recommendations of the panel supported by applicable legislation and policy, have a logical flow and format, and include sufficient detailed reasons.
4. The Case Manager is responsible for providing advice and awareness of issues and challenges to facilitate Board understanding to render thorough decisions or alternative solutions.- This is accomplished by:
- Leading discussions with intake staff and appeal parties with respect of deficient filings.
 - Facilitating discussions between parties to enable understanding of issues that are raised.
 - Coordinating discussions to facilitate settlement of complaints prior to formal hearing.
 - Leading and conducting background research and analysis on appeal cases.
 - Evaluating and assessing relevant board decisions, and court cases including interpreting legislation and providing impact and application analysis.
 - Proactively identifying issues and providing panel members with relevant information for hearings.
5. This position is responsible for developing and maintaining strategic and productive relationships with Board Members, appeal parties, stakeholders and both internal and external multidisciplinary resources to ensure roles and procedures are understood by all parties enabling a fair, equitable and efficient appeal processes.- This includes:

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- Leading discussions with parties to the appeals to ensure understanding of disclosure and hearing processes.
- Translating complex issues/terminology into language that is understood by Board Members and stakeholders.
- Representing the interest of the boards at departmental activities, interdepartmental activities, municipal functions, association functions or other stakeholder functions.
- Providing information and advice regarding the board's mandates, responsibilities, roles, legislation, etc. to internal and external stakeholders.
- Attend, and/or develop and deliver presentations at conferences and trade shows (APPI, CIP, ADOA, RMA, Alberta Municipalities CPAA etc..)

6. The Case Manager is responsible for developing and administering training to Board Members, appeal parties, and both internal and external stakeholders to ensure roles and procedures are understood by all. This includes:

- Preparing information bulletins, briefing materials, newsletter articles for presentation to Board members and internal and external stakeholders.
- Preparing and delivering briefs and training material on technical issues for Board Members at workshops and other board training events, as required.
- Translating complex issues/terminology into language that is understood by Board Members and stakeholders.
- Developing and maintaining multidisciplinary resources to educate Board Members and administration (lawyers, expert witnesses on assessment, planning, property valuation, engineers, etc.)

7. Where applicable, the Case Manager, working with the Board Solicitors, is responsible for ensuring the effective use of law students and planning students. This includes:

- Preparing and delivering training to students.
- Providing clear instructions for student projects.
- Providing constructive feedback to ensure development of the students.
- Managing the students' workload to ensure timelines are adhered to.

8. This position is responsible for supporting and contributing to the success of the boards through the management of a portfolio of cases enabling consistent and efficient case management. - This involves:

- Facilitating the review of case management processes to improve the effective use of resources.
- Encouraging the use of standard case management practices, methodology and processes.
- Providing recommendations to management regarding policy, program and procedural changes/revisions.
- Identifying trends, issues and GoA policies/legislation as well as other jurisdictional legislation that may impact the functioning of the boards and its decisions
- Providing management with an assessment of Board decisions that impact other GoA ministries.
- Development and implementation of best practices for case management.

9. The Case Manager is responsible for activities specific to annexation matters. - This involves:

- Preparing draft Orders in Council for both "contested" and "uncontested" annexations
- Making recommendations to Cabinet via briefing packages on "uncontested" annexations, ensuring they meet annexation principles.
- Supervise the preparation of the transmittal Cabinet documents required for "uncontested" annexations.
- Attending courses to remain current with emerging land planning and municipal trends and challenges, as required.

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- Ensuring the Board is aware of legislation or plans that could impact Board decisions or process.
- Providing case management support to inter-municipal disputes, off-site levy and subdivision appeals, as required.
- Writing briefing notes and other communications to the Chair, Deputy Minister and/or Minister in support of applications that are before the board.
- Reviewing Board Rules and Procedures and making recommendations for updating, when required.

10. The Case Manager, together with the Manager of Operations and Training, is responsible for developing learning content on annexations and/or intermunicipal disputes and facilitate staff and board member training.

11. This position is responsible for participating in various board/ministry committees or initiatives, as assigned by the Chair/Executive Director/Director.

SCOPE: List specific information that illustrates the challenges, problem solving and creativity requirements and decision-making capacity of the position. - Also identify the internal or external areas the job impacts (see Writing Guide [Pages 11-12](#)).

The position involves advising Board Members concerning technical and procedural matters that arise frequently during hearings and often without notice, requiring immediate resolution in a fair and transparent manner.

The position functions independently in identifying annexation application issues, documenting history and background, relevant legislation, and board and court decisions to ensure the hearing panel has a thorough understanding of the issues/terminology to make an informed decision. -The position facilitates and drafts clear decisions, provide guidance to disputants, municipalities and the general public concerning the interpretation and application of the *Municipal Government Act* and related legislation. As the decisions frequently have significant financial and political consequences for all parties involved, including landowners, municipalities and other GoA ministries, the Courts may scrutinize for fairness and legal accuracy.

The position initiates and independently leads and facilitates discussions between appellants/respondents to reach a workable solution prior to the official hearing to minimize backlog of cases.

The position is required to brief the Chair/Board management, Minister, DM, or Cabinet regarding decisions of a politically sensitive nature.

KNOWLEDGE, SKILLS & ABILITIES: Include information on required diplomas and degrees along with identifying the most important knowledge factors, including knowledge about practical procedures, administrative, technical or professional techniques, technical, scientific or program related processes, etc. Detail specific training if there is an occupational certification/registration requirement for the position. Specify the type of experience required for the position (see Writing Guide [Pages 12-14](#)).

The position requires a post-secondary degree in a related field (business administration, public administration, law, land use planning, etc.) with a minimum of 5 years of directly related experience. - A master's degree, lawyer and/or Registered Professional Planner and Canadian Institute of Planning designations, with extensive years of municipal and/or planning related experience is preferred. Equivalencies will be considered.

The position requires extensive knowledge and understanding in the following areas:

- Administrative law (principles of natural justice and fairness) and quasi-judicial appeal process
- *Municipal Government Act*
- Municipal administration
- Property assessment and taxation in Alberta

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- Planning Law and Planning Principles, with a focus on Rural Planning and an understanding of the differences between urban and rural planning challenges
- Property Law and how it applies to annexation applications
- GoA related legislation, policies and strategic intent including administrative policies and directives and the hierarchy of approvals and legislation
- Ministry policies, directives, business planning and priorities
- LPRT procedures, practices and Rules
- Relevant case law and previous recommendations/decisions of the LPRT
- Case/Project management methods, principles and techniques
- Occupational Health and Safety requirements.
- Other Administrative Board Structure and Roles
- Municipal operations and different municipality types and their capacities
- Subdivision and Development Process in Alberta
- The implications and liability risks of LPRT decisions.

The position requires the following skills and abilities:

- Strong leadership skills
- Strong communication skills including persuading, encouraging, negotiating and motivating
- Understanding situational awareness and monitor behaviour of parties.
- How to work with complex clients and to de-escalate situations that can arise.
- Effective facilitation, consensus and team building skills
- Strong analytical, problem solving and critical analysis skills
- Ability to manage resources, and time commitments of concurrent cases involving collaboration with multiple stakeholders
- Ability to network and build strong and lasting relationships/partnerships/alliances
- Ability to synthesize information and provide recommendations
- Ability to weigh multiple needs to maximize results and achieve the best solution
- Ability to effectively prioritize
- Excellent project management and organization skills
- Excellent writing skills as well as the knowledge and ability to prepare board orders and other material
- Ability to work both independently and in a team-oriented, collaborative environment
- Ability to shift priorities to meet changing demands/priorities and timelines.
- Ability to understand technical reports such as Traffic Impact Assessments, Geotechnical Studies, Storm Water Management Plans, Environmental Impact Assessment, Biophysical Impact Assessments, etc.

CONTACTS: Identify the main contacts the position communicates with and the purpose of the communication (See Writing Guide [Pages 14-15](#)).

Property owners/agents/lawyers/senior Government Officials/municipal and other Government

Representatives: To set up hearings and encourage dispute resolution or issue identification.

Appeal Party contacts: To set up hearings and encourage complaint/appeal resolution. Discuss processes and procedures

Board staff members: To access various areas of expertise, including legal, assessment, and scheduling

External Resources: To access expertise for hearings and provide information to Board Members

SUPERVISION EXERCISED: List position numbers, class titles, and working titles of positions directly supervised (see Writing Guide [Page 15](#))

Some supervision of summer law students may be required

CHANGES SINCE LAST CLASSIFICATION REVIEW: Identify significant changes, that have impacted the responsibilities assigned to your position since the last review (see Writing Guide [Pages 15-16](#)).

ORGANIZATION CHART: An organization chart that includes supervisor, peers and staff MUST be attached (see Writing Guide [Page 17](#)).

This information is being collected under the authority of Section 10 of the Public Service Act and will be used to allocate positions within a classification plan and to manage the Alberta government human resources program. If you have any questions about the collection of this information, contact the Job Evaluation Unit, 6th Floor, Peace Hills Trust Tower, 10011 - 109 Street, Edmonton, Alberta, T5J 3S8, phone 780/408-8400 or contact your Ministry Human Resource Office.

Signatures

The signatures below indicate that the incumbent, manager and division director/ADM have read, discussed and agreed that the information accurately reflects the work assigned (see Writing Guide [Page 16](#))

Incumbent

Name

Signature

Date

Manager

Name

Signature

Date

Division Director/ADM

Name

Signature

Date