

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

Working Title Estate Investigator	Name
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Position Number	Reports to Position No., Class & Level	Division, Branch/Unit Strategic Services Division Office of the Public Guardian and Trustee (OPGT) – Trust Administration	Ministry Assisted Living and Social Services
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Present Class	Requested Class
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Dept ID	Program Code	Project Code (if applicable)
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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](#)).

The Investigator, under the supervision of the client Services Supervisor, will conduct initial investigations on the estates of represented adults, deceased persons and minors at the working level of an expert in each area of administration, including estates involving land, business interests or farms. The Investigator will be the first contact person of the Public Guardian and Trustee’s office on new estates and will meet family members, tenants, bank officials, neighbours, police authorities, hazardous goods specialists and other persons who may have contact on a file in which the Public Trustee is involved. The Investigator will conduct site investigations, complete estate inventories and continue to carry out required duties in compliance with applicable statutes, regulations, policies and procedures. The Investigator will strive to uphold the mission and value statement of the Office of the Public Guardian and Trustee and demonstrate the competencies required of the Alberta Government and the Office of the Public Guardian and Trustee through example and leadership.

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. Provides high quality service to support the effective and efficient administration of estates involving complex and/or sensitive issues relating to investigations, inventory and property management.

Activities:

- Review and discuss file with assigned caseworker and make inquiries about the client (if applicable).
- Determine conditions of investigation site; locate keys; locate assets; contact resource persons and other interested parties.
- Comply with the safety procedures under the *Occupational Health and Safety Act* and the Field Safety Manual.
- Determine what documents to take to the investigation site and arrange for completion and execution of those documents.
- Ensure that all necessary safety items and tools are taken to the investigation site.
- Ensure that neighbours and police are alerted to the fact that an investigation is being conducted.
- Ensure dual control is maintained during all investigations, in particular when working in conjunction with the Public Guardian and Trustee’s Contract Investigators.
- Ensure that an inventory of all of the assets in all of the buildings is completed, recorded and photographed under dual control.
- Ensure all valuables are removed and retained under dual control for delivery back to the office.
- Locate a Will if one exists and look for kinship information.
- Arrange for feeding and watering of livestock or kennel service for domestic pets.
- Arrange for estate assets to be taken to a storage facility, for other goods to be disposed of at a garbage dump and return valuables and documentation to the office, especially documentation relating to family and financial matters.
- Secure the investigation site with the possibility of engaging a locksmith to change the locks, attaching padlocks on unsecured doors, boarding up broken windows and performing other rudimentary repairs.
- Determine if a tenancy agreement is in effect and obtain a check-in/check-out report and particulars of any damage

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deposit.

- Document any particulars of the inspection including inventory, people present at the investigation, description of the investigation site, position of contents, vehicles.
- Describe any cash or valuables located at, or left in premises; describe items removed from premises; describe the condition of the various assets; describe storage arrangements; describe any assets taken to auction.
- On return to the office, brief the caseworker about the conduct of the investigation.
- Conduct follow-up investigations as required.
- Arrange for periodic inspection by family, neighbours, police or a contracted party.
- Arrange to winterize the investigation site if necessary and either cancel utility services or ensure that gas, heat, and electricity is available.
- Arrange for periodic inspections and protective maintenance including lawn mowing, weed control, snow removal and repair.
- Conduct safety deposit box examinations; list contents; empty box and return contents to the office.
- Resolve disputes over ownership of objects found during the course of an investigation.
- Serve documents.

2. Provide leadership in team administration, process and management.

Activities:

- Lead investigation team and instruct contract investigators.
- Work with and instruct private contractors.
- Participate in periodic meetings with the view of providing leadership, knowledge gained and commitment to continuous improvement.
- May serve as the Public Trustee's officer in any litigation dealing with conduct of an investigation.
- Be part of the Public Trustee's Advisory Board to describe an estate asset, house, building, land or business that is being disposed of by the Public Trustee.
- Be part of the Occupational Health and Safety Committee.

3. Represent the Public Trustee in a professional manner to promote and advance the role of the Office.

Activities:

- In conducting investigations, the Investigator is an ambassador for the Public Guardian and Trustee's office and leaves a first impression of professionalism with every person dealt with during the course of conducting an investigation.

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](#)).

- Communication with contract investigators, businesses, government offices, medical institutions, municipalities, neighbours, auctioneers, hazardous goods specialists, professionals, law enforcement agencies/police, clients, stakeholders and the public.
- Participate in periodic meetings and co-ordinate investigations in a manner that will reduce costs to individual estates.
- Make recommendations regarding estate administration.
- Exercise extensive professional judgement and independence in the application and interpretation of legislation, regulations, departmental policies and office procedures.
- Maintain effective working relationships with members of the trust administration teams and other internal clients.

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](#)).

- Thorough understanding of the legislation and common law in relation to the administration of wills, trusts and estates.
- In-depth knowledge of policies and procedures used in the Office of the Public Guardian and Trustee.
- Thorough knowledge of property management, business practices, accounting procedures and financial benefits available from government and private sources.
- Strong interpersonal communication skills for conflict resolution under stressful and sensitive circumstances and to establish and maintain good relationships with a variety of clients, stakeholders, the public and staff.
- Ability to work on a team, provide leadership and understand team processes.
- Two-year diploma in a related field plus 3 years related experience in private investigative or police investigation or case management
- Effective use of oral, written, mediation, negotiation, analytical, process management and decision-making skills.
- Sound knowledge of computer applications.
- Valid driver's license required.
- Firearms Acquisition Certificate required.
- First Aid Certificate required.
- Knowledge of federal and provincial legislation governing handling and transport of hazardous goods and firearms.
- Knowledge of *Occupational Health & Safety Act* and Public Trustee's office Field Safety Manual.

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

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

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](#)).

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 (yyyy/mm/dd)

Public Trustee

_____	_____	_____
Name	Signature	Date (yyyy/mm/dd)

Executive Director

_____	_____	_____
Name	Signature	Date (yyyy/mm/dd)