

Working Title Assistant Public Trustee - Calgary	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	Ministry Seniors, Community and Social Services
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Present Class	Requested Class	Levels to Deputy Minister (Not including incumbent level)
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Dept ID	Program Code	Project Code (if applicable)
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**POSITION SUMMARY:** Briefly describe the main purpose of the position, and why it exists for the most part (See Management Job Description Writing Guide [Page 7](#)).

Under the umbrella of the Office of the Public Trustee and Guardian (OPGT), Public Trusteeship (PT) services include making financial decisions for adults when they are not able to do so and no one else is available to act, protecting the assets of minors, and estate administration. The PT operates under the Public Trustee Act, Minors’ Property Act, Adult Guardianship and Trustee Act, Estate Administration Act, Wills and Succession Act, etc.

The Public Trustee’s office is led by the Public Trustee and three senior leaders (Assistant Public Trustees) responsible for specific areas or functions. All positions work collaboratively to ensure the effective and efficient operations. Reporting to the Public Trustee, The Assistant Public Trustee Calgary plays a pivotal role in the senior leadership, development, and delivery of the PT program. This position leads the Trust Administration Calgary office. By ensuring the highest standards of accountability and fiduciary duty, the Assistant Public Trustee upholds and models the core values of respect, integrity, accountability, and excellence.

As a valued member of the PT leadership team, this position is instrumental in driving excellent client service, organizational modernization, program development, and the continuous improvement of services for Albertans. This position is accountable for an operational budget of \$3.3M and a workforce of 33 full time equivalencies.

**SPECIFIC ACCOUNTABILITIES:** List the most important end results or outcomes of the position and how they are achieved. Each end result shows what the position is accountable for, within what framework and what the added value is. Normally a position has 4-8 core end results. For each end result approximately 3-6 activities should be described (See Writing Guide [Page 8](#)).

**Strategic leadership of the Calgary Trust Administration team.**

- Provide high-level leadership and vision to align Calgary operations with the holistic and provincial strategic goals of the Public Trustee program.
- Collaborate with senior leadership to set organizational priorities, develop business/operational plans, and monitor performance metrics/compliance.
- Represent the Public Trustee in interactions with government stakeholders, and external organizations.
- Promote a culture of innovation, adaptability, and accountability across the Calgary office.

**Program Development, Delivery and Oversight**

- Leads the Calgary Trust Administration team with the provision of services in the areas of represented adults, estate administration, protecting the assets of minors, missing persons, and deceased.
- Ensure operations is meeting legislation, regulatory and policy requirements while addressing client needs and maintaining the highest level of fiduciary accountability.
- Resolving complex client issues through the interpretation of policy and collaboration with experts (legal, tax, finance, investments, etc.)

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- Identify opportunities and lead change for innovation and process improvement, introducing technology or methodologies that enhance service delivery.
- Oversee the development and revision of policies and procedures to align with best practices and legislative changes.
- Ensure quality assurance and adherence to quality standards across all program areas.
- Ensuring effective oversight processes are in places to assess individual and aggregate compliance.
- Participate in the OPGT Governance and Risk, and Root Cause Committees aimed at identifying organizational risks and implementing controls/mitigation strategies to eliminate or reduce impact.
- Project manage key projects/initiatives on behalf of Trust Administration, the PT, and/or OPGT.

### **Human Resource Management**

- Recruit, train, and manage the Calgary Trust Administration workforce.
- Provide clear direction, set performance expectations, and ensure alignment with GoA Performance Excellence practices.
- Ensure employees have the training and tools required to perform their roles. Encourage development of skills in alignment with the GoA Professional Development Framework.
- Implement strategies to enhance employee engagement, address workplace challenges, and promote diversity and inclusion.
- Support and champion the OPGT People Plan and OPGT D&I Committee.

### **Financial Management and Administration**

- Manage the day-to-day operations of the Calgary Trust Administration office, ensuring services are delivered efficiently and within program and workforce budget.
- Ensure financial controls are implemented and maintained.
- Ensure staff are prepared and support PT financial and program audits.
- Implement strategies to address audit recommendations.

### **Stakeholder Engagement**

- Represent the PT, OPGT with internal and external stakeholders.
- Establish, develop, and maintain effective working relationships with stakeholders.
- Lead proactive education of PT services to increase public awareness of the PT's role and responsibilities.

**KNOWLEDGE/EXPERIENCE:** Include information on required diplomas and degrees along with identifying the most important knowledge factors, including knowledge about practical procedures, administrative, specialized techniques, 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 9-10](#)).

- A Related Degree (business management, finance, law, social sciences) and progressive management experience in a complex program delivery operation.
- Significant experience in leading within a complex service/program delivery area.
- Proven ability leading and developing high-performing teams.
- Strong knowledge of relevant legislation (AGTA, Public Trustee Act, FOIP, Mental Health Act, Child Welfare Act, Minors Property Act, Wills and Succession Act, Administration of Estates Act), policies, and best practices in estate and trust administration.
- Experience serving vulnerable adults.
- Ability to lead organizational change.
- Effective in communicating and engaging diverse audiences, building consensus, and advancing PT goals.
- Experience using problem -solving skills to resolve complex issues.
- Experience with program oversight to ensure compliance and fiduciary accountability in maintained.
- Experience leading projects to ensure alignment with PT goals, from initiation through to implementation and evaluation.
- Working knowledge of government policy management, business planning, accountability processes and

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- performance management systems.
- Demonstrated ability to develop relationships and work collaboratively with others.
- Experience in managing budgets and human resources.
- Demonstrated ability to work with business-related technology.

**LEADERSHIP AND BUSINESS KNOW-HOW:** Specify the level of integration, organization and leadership skills required to produce the results expected of the position. Provide recent examples (See Writing Guide [Pages 10-11](#)).

- The Assistant Public Trustee is required to integrate strategic leadership and business acumen to achieve results in a complex and technical environment.
- This position requires the ability to anticipate future trends, risks and opportunities that may impact Trust Administration.
  - Translate organizational goals into operational strategies.
  - Evaluative complex problems, balance competing priorities, make informed decisions and achieve the best outcomes for clients and the organization.
  - Drive modernization efforts to improve client outcomes and PT operations.
  - Expertise in managing complex client cases with empathy and professionalism.
  - Ability to build and sustain relationships with lawyers, benefit programs, financial experts, tax experts, service providers, etc.
  - Proficient in using data analytics to evaluate program efficiency and areas for development.
  - Anticipate and mitigate risks in service delivery, financial oversight, and legal compliance.
  - Ensure robust internal controls are in place to mitigate risk and maintain fiduciary accountability.

**PROBLEM SOLVING:** Describe difficult or challenging situations the position is typically expected to solve; the degree of originality of the solutions; and the assistance available (See Writing Guide [Pages 11-12](#)).

The Assistant Public Trustee is accountable for making decisions in legally complex areas of estate administration relating to deceased persons, minors, and represented adults. A key purpose of the job is to develop unique solutions to complex issues and devising innovative approaches techniques and methods. Situations are generally unstructured and require creative approaches that must be frequently modified. Decisions made with respect to complicated and sensitive issues arising from estate administration typically entail legal implications that, if inappropriately made, could have severe financial impact on the Public Trustee and government of Alberta as a result of legal actions. This position must anticipate and respond to changes in demographics, laws, society, and financial management. For example, handling unique or unconventional assets such as e-currency, intellectual property, etc. This position must also address errors and omissions in files.

Situations involving vulnerable adults, minors or beneficiaries are often emotionally charged. This position is required to translate complex and technical information to stakeholders.

The Assistant Public Trustee must deal with a variety of operational issues on a daily basis and resolve each quickly to ensure and maintain service to the public and to avoid complaints to the Minister and MLAs. Operational levels must be maintained while responding to requests for immediate information and decisions by both internal and external entities.

**RELATIONSHIPS/CONTACTS:** Identify internal and/or external clients, partners and stakeholders with whom your position communicates and indicate the frequency, purpose and nature of the contact (i.e. how they are affected by recommendations, decision-making and action(s) taken) (See Writing Guide [Pages 12-13](#)).

Clients	Frequency	Nature and Purpose of Contact
Internal  Internal contacts including the Public Trustee, PT Leadership Team, Trust Administration	Daily	Leading and supporting the ongoing operations of the PT program. Directing and overseeing work.

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Clients	Frequency	Nature and Purpose of Contact
Public Guardian, Financial Benefit Programs (AISH, Senior's Benefit Program, Funeral Benefit Program, etc.), Child Intervention	2-3 times per week and on an as needed basis	Program updates, coordination, policy and procedure advice, general advice and direction, collaboration on common clients.
Justice Legal Support	2-3 times per week and on an as needed basis	Consultation on complex issues, providing direction on client matters.
External  The legal community, realtors, the Canadian Bar Association, Federal Benefit programs, Offices of the Public Trustees and Guardians across Canada, Business partners (AHS, Funeral Providers, etc.). Clients, Guardians, care providers and the general public.	Weekly and on an as needed basis	Consultation on complex issues, providing direction on client matters.

**IMPACT AND MAGNITUDE OF JOB (SCOPE):** Identify how the position directly affects results, and the extent to which stakeholders are affected by those results. Provide recent examples (See Writing Guide [Pages 13-14](#)).

The PT manages over \$700 million in client property and funds. The Assistant Public Trustee is responsible for Trust Administration in the Calgary office and provides last resort services for represented adults, minors, and deceased persons. The position directly impacts vulnerable populations. The position ensures client assets are protected and ensure those that make financial decision on behalf of clients are operating with integrity and empathy. The outcomes directly impact the quality of life of those being served. Poor decision-making can result in severe personal and financial hardship, along with legal and reputational implications. Mismanagement or perceived inefficiency could erode public confidence in the PT program and Government operations. Investigating and resolving errors in decision-making or file management could expose the PT to legal or reputational risk.

The work performed touches on a wide variety of legislative frameworks and multiple programs. This position has broad discretion in managing the program, financial and human resources to achieve results.

**CHANGES SINCE LAST REVIEW:** Identify significant changes, that have impacted the major responsibilities and accountabilities assigned to your position since the last review (See Writing Guide [Page 14](#)).

No changes – update only

**COMPARABLE POSITIONS:** List comparable GOA benchmarks (See Writing Guide [Pages 14-15](#)).

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## Signatures

The signatures below indicate that the manager (incumbent) and division director/ADM have read, discussed and agreed that the information accurately reflects the work assigned (See Writing Guide [Page 15](#)).

### Incumbent

_____	_____	_____
Name	Signature	Date

### Manager

_____	_____	_____
Name	Signature	Date

### Division Director/ADM

_____	_____	_____
Name	Signature	Date

*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, 6<sup>th</sup> Floor, Peace Hills Trust Tower, 10011 - 109 Street, Edmonton, Alberta T5J 3S8, phone 780/408-8400 or contact your Ministry Human Resource Office.*