

Working Title Manager, Trust Administration		Name	
Position Number	Reports to Position No., Class & Level	Division, Branch/Unit Strategic Services - Office of the Public Guardian and Trustee - Calgary	Ministry Assisted Living and Social Services
Present Classification		Requested Classification	Levels to Deputy Minister (Not including incumbent level)
Dept ID	Program Code	Project Code (if applicable)	

**POSITION SUMMARY:** Briefly describe the main purpose of the position, and why it exists for the most part (See PP [Slides 28-32](#)).

The Public Trustee protects and administers the property of dependent adults, minors and deceased persons, where there is no one else able to act. The Office maintains the highest legal and business standards while ensuring that clients are treated with dignity, compassion and respect. The Public Trustee operates under the *Public Trustee Act, Alberta Guardians and Trustee Act, Minors' Property Act, Trustee Act, Administration of Estates Act, Child, Family and Youth Enhancement Act*, as well as any other powers and duties that the Lieutenant Governor in Council may prescribe.

Reporting to the Assistant Public Trustee, the Manager, Trust Administration, is responsible for the effective delivery of legislative and administrative services pertaining to represented adults. The PT currently serves in excess of 18,000 represented adults, minor children, deceased persons and trusts with assets in excess of \$600 million. This position is results-orientated focused on developing others, effective problem solving, and using innovations within the relevant legislative and policy frameworks of the PT so that client service needs are met. The position also has responsibility for building effective linkages and alliances within legal and non-legal groups within and outside of the OPGT so that clients' needs are optimized.

As a leader of the Calgary Trust Administration Delivery Team, this position is accountable for developing and implementing business unit plans; identifying and facilitating changes in program direction; guiding staff to develop and implement plans to improve individual and business unit performance; and ensuring consistent delivery of program services across the province. This position contributes directly to outcomes associated with OPGT strategic and operational directions by ensuring that program services are administered in accordance with accepted practices and guidelines as defined by relevant legislation, policies and procedures.

The Manager, Trust Administration, upholds and models the Vision, Mission, Values and Guiding Principles of the OPGT and demonstrates the competencies required of the Alberta Government and OPGT through leadership and example. All work is carried out in compliance with applicable legislation, regulations, policies and procedures.

**SPECIFIC ACCOUNTABILITIES:** List the most important end results or outcomes (not duties) 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 4-6 core end results. For each end result approximately 4-6 major activities should be described (See PP [Slides 20-27](#)).

**Strategic Thinking**

**Core End Result: Position engages in strategic and operational planning within the OPGT mandate with linkages to all relevant planning groups\* leading the development of integrated operational plans implemented in Trust Administration based on agreed upon goals and time frames by:**

\*Note: see Relationships/Contacts section on p.5

- Assessing both legal and non-legal factors that contribute to program policy advancement of the PT and its place in OPGT and Seniors and Community Social Services.
- Demonstrating a strategic understanding of the mandate of the Public Trustee.

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- Demonstrating excellence in policy recommendations and procedural guidelines relating to Trust Administration having regard to legal and non-legal elements.
- Developing strategies and tactics for improving client services in Trust Administration.
- Identifying and responding to trends and legislative changes which may affect the PT with a focus on their impact on Trust Administration.
- Demonstrating integrity in the formulation and application of policies and procedures relating to the attainment of the objectives and goals of the OPGT in providing excellence in Trust Administration.
- Completing manpower planning (including succession planning and) for Trust Administration.

## Leadership

**Core end result: Position provides leadership within a model of ethical behaviour consistent with the values of Alberta Public Service so that the service goals of Client Service Delivery meet the needs of clients and stakeholders of the OPGT.**

- Inputs into development or revision of legislation directly impacting the PT.
- Reviews and comments upon other legislation indirectly impacting the PT.
- Consults with the Public Trustee, Assistant Public Trustee, Trust Administration, Finance, and other Managers in matters of office policy and legal application.
- Provides instructions to legal section on client files having legal consequences.
- Leads and directs Trust Administration to ensure that services regarding represented adults matters are delivered effectively and the controls and policies are observed and legislative requirements are met.
- Provides leadership to four Trust Administration Supervisors and internal and external stakeholders on emerging public issues impacting client files.
- Provides leadership and guidance to four Trust Administration Supervisors, Public Trustee Representatives and Administrative Trust Assistants regarding new legislation, new initiatives and in the interpretation and application of office policy to ensure the completion of estate administration and related functions in an effective manner.
- Provides leadership to staff in the interpretation and application of office policy to ensure the appropriate completion of trust and estate administration files.
- Coordinates and ensures human resource and manpower planning activities are carried out in a fair, respectful and unbiased manner.
- Mentors, reviews and discusses the Performance Excellence and Development Plans of employees in Trust Administration.
- Establishes and maintains administrative controls to ensure that all work adheres to established laws policies and best practices.
- Provides supervision and review of all Trust Administration functions.
- Filters priorities for Trust Administration to ensure appropriate human resource allocations and to ensure service and productivity goals are met.
- Ensures that quality client service continues while embracing the challenges of ongoing change and transition.
- Acts with integrity when advising and coaching Trust Administration Supervisors on dealing with difficult, sensitive or complex estate and trust issues.
- Models the Alberta Public Service values and embraces the OPGT vision, mission, values and guiding principles.

## Results Orientation

**Core end result: Position focuses on results within the context of the Alberta Public Service values and the Mission and Values of the OPGT to ensure that high quality service is received by the clients and stakeholders.**

- Monitors the preparation of legal documents used to apply for jurisdictional authority, to register legal interests and to convey property interests.
- Participates in the drafting of legal documents and precedent formats for use by Public Trustee and in particular those related to Trust Administration.
- Reviews legal documents on behalf of the Public Trustee, including transfers of land, settlement agreements,

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releases, bonds of indemnity and share certificates.

- Monitors and provides instruction on settlement of legal claims against estates.
- Establishes services standards and priorities within Trust Administration and monitors results with a view to improving performance and customer service.
- Responsible for overall timeliness and consistency of Trust Administration services.
- Supervises and provides direction with respect to intake of work and determines extent of involvement with a particular estate or trust.
- Works collaboratively with other members of Trust Administration and other business units (Finance, Tax) to make appropriate decisions on complex financial assets belonging to client estates.
- Ensures appropriate processes in place, with proper representation from within the OPT, to make decisions on complex financial assets belonging to client estates.
- Builds consensus amongst represented parties and ensures proper decisions are made on management and disposition of complex financial assets belonging to client estates.
- Prepares briefings and background material in response to complaints received by the Minister.
- Executes legal documents and disbursement/final distribution requisitions as signing officer.
- Prepares and manages the Request for Proposal process and selection of service providers as they related to services associated with the administration of trusts.
- Assist with liaising and assisting with OAG audits.

### **Impact and Influence**

**Core end result: Position fosters internal collaboration and external alliances that strengthen Trust Administration and promote cooperative achievement of results.**

- Represents Trust Administration at various meetings and provides information to the legal community, judiciary and other external stakeholders to facilitate the effective administration of client files.
- Represents the PT or OPGT on departmental and interdepartmental committees.
- Represents the PT or OPGT when meeting external groups, organizations and stakeholders.
- Participates as a member of the Senior Management Team working with and assisting the Assistant Public Trustee, Trust Administration, and the Public Trustee in the operation of the office.
- Collaborates with other sections of the OPGT, including the Legal Services, Income Tax Services, Records Management and Financial Services sections to improve and coordinate overall internal and external service.
- Coordinates associations with outside agencies such as legal entities, mental health organizations, police services, consulates, volunteer agencies, hospitals, funeral director associations, auctioneer associations and government departments to implement, maintain and improve service for clients.

### **Problem Solving and Judgment**

**Core end result: Position monitors the various systems of Trust Administration to ensure quality delivery of client services within supporting legislation, policy and procedures so the section makes proactive systemic responses to the dynamic nature of client service.**

- Supports integrated and coordinated service delivery for clients on matters pertaining to the administration of represented adults.
- Liaises with Director of Legal Services to identify best method of securing legal services on client files.
- Liaises with the Manager, Tax and Financial Advisory Services, to identify best method of securing income tax and financial advisory services on client files.
- Conducts ad hoc meetings with other sections of the office involving legal, tax or other service based problems.
- Oversees responses to legal documents served on the Public Trustee in support of applications before the Court of King's Bench and other levels of Court.
- Conducts and coordinates legal research that aids service to complex/sensitive files.
- Completes legal, client service delivery, audit, tax and general file summaries to problem solve complex/sensitive files.

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- Utilizes precedent case law to impact and improve service delivery on complex/sensitive files
- Acts as the decision-maker on complex Trust Administration matters, including sensitive files, estates or trusts with complex legal issues.
- Provides direction on client files where following a policy or procedure would lead to an inappropriate result or where the application of a policy or procedure in a particular case is unclear.
- Identifies innovative solutions in situations involving unique or novel client case circumstances.
- Addresses highly sensitive client situations including matters involving police agencies.
- Converts questions and concerns raised by other business units of the OPGT into actions that improve the quality of internal service provided by Trust Administration.
- Prepares briefing notes on the direction of the Assistant Public Trustee, Client Services, or Public Trustee based on emergent problem solving challenges.
- Responds to complaints on estate and trust related matters made by the public or referred through the Ombudsman's Office, the Minister's Office or offices of Members of the Legislature.
- Consults with the Assistant Public Trustees in matters of office policy and legal decision making.

### Developing Others

**Core end result: Position provides direction and support, gives feedback and provides long-term coaching, mentoring and training to Public Trustee Representatives on development and performance matters within human resource and technical frameworks so that the Trust Administration Supervisors can fulfill their roles as leaders and competent decision-makers within Trust Administration.**

- Provides leadership, mentorship and support to the four Trust Administration Supervisors in utilizing a multi-disciplinary team approach to holistically deliver client services, and on legal aspects of estate and trust files.
- Facilitates the decision making of the PTR on all Trust Administration matters.
- Identifies training opportunities and challenges within Trust Administration and organizes and implements training programs as required.
- Directs the performance management processes within Trust Administration.
- Facilitates career tracking and development through a wide selection of learning opportunities within government and external educational institutions.
- Identifies team building opportunities.
- Oversees recruitment and selection, and other human resource functions of Trust Administration such as job evaluation, manpower and succession planning, staff development, labor relations etc.

### Innovation

**Core end result: Position researches and devises new ways to improve Trust Administration services within legislative guidelines, policies and procedures so that the Public Trustee becomes a government leader in best practices.**

- Collaborates with other business units within the OPGT and external stakeholders to develop innovative ways to improve Trust Administration.
- Develops strong partnerships, through consultation, facilitation and coordination by gathering input from stakeholders, within and outside the Ministry on key trends, issues, gaps in services, and priorities that impact clients.
- Identifies and implements innovations that improve service to internal and external clients and stakeholders.
- Applies best practices innovations, both legal and non-legal, to Trust Administration.
- Creates decision making models for complex/sensitive files.
- Fosters technological innovations for Trust Administration.

**KNOWLEDGE/EXPERIENCE:** Include a list of the most important knowledge factors, including knowledge about practical procedures, specialized techniques etc. not only diplomas and degrees. Detail specific training if there is an occupational certification/registration requirement for the position. Specify the type of experience required for the position (See PP [Slides 33-37](#)).

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- Detailed knowledge of legislation governing estate and client service delivery.
  - Detailed knowledge of government benefits programs.
  - Extensive knowledge in the preparation of briefs and reports.
  - Working knowledge of how to apply legal solutions to case files.
  - Working knowledge of legislation directly and indirectly affecting the Public Trustee.
  - Working knowledge of case law.
  - In depth knowledge of teams and leadership.
  - Knowledge of information technology and its application to estate administration.
  - Knowledge and experience in the field of estate and trust administration or human services.
  - Knowledge and ability to effectively apply principles of leadership, teamwork, and resource management to Trust Administration area of the OPGT.
  - Knowledge and proven ability to accomplish business goals and strategies using innovative and strategic thinking and problem solving abilities.
  - Ability to transform strategic and operational planning into meaningful action within Trust Administration.
  - Ability to utilize strong communication skills (verbal, non-verbal and written), and empower, motivate and engage staff.
  - Ability to positively influence others and lead change.
  - Ability to be creative and resourceful in identifying and implementing solutions to complex and challenging client problems.
  - Ability to use critical thinking, and sound evaluative judgment based on a solid understanding of the business.
  - Demonstrated ability to effectively filter and implement advice from legal, accounting and tax sections and program managers.
  - Effective communication skills needed to interface and give quality internal and external services to clients, stakeholders, businesses that support Trust Administration work, the bar and judiciary and government staff at many levels, including Deputy Ministers.
  - Awareness of current trends and initiatives within and outside the government.
  - Experience in client-focused program delivery with an emphasis on understanding and meeting the needs of vulnerable clients.
- University graduation in a related field plus progressively responsible related experience.

**LEADERSHIP AND BUSINESS KNOW-HOW:** Specify the level of coordination, organization and leadership required to produce the results expected of the position. Provide recent examples (See PP [Slides 38-40](#)).

- The position must coordinate with all other sections of the OPGT to ensure that Trust Administration aligns itself effectively with all policy and procedures and the strategic and operational planning of the OPGT in service to its clients.
- Provides leadership and effective management and stewardship of resources to facilitate the successful achievement of organizational goals. Monitors progress and intervenes at an early stage to ensure delivery of appropriate fiscal and human resources in Trust Administration.
- Develops and modifies work procedures and processes for Trust Administration.
- Position expected to recognize and highlight key trends, create a climate for change, and provide new perspectives and test new concepts while maintaining the core business.
- Must be apprised of current technologies and utilize them to develop and continually improve productivity and efficiency.
- Provides leadership to all members of Trust Administration and ensures that the area maintains effective alliances with the private and public groups that assist the section in completing its service commitments.
- Client and business partners are reliant on prompt delivery of specialized service. The position must establish and maintain administrative controls to ensure that all work adheres to established laws and policies and is performed within an acceptable time frame.
- The position must lead the team (40+) by evaluating and managing performance, employing effective recruitment and selection, job evaluation, labor relations, and appropriate training.
- The position must know how to generate team synergy while producing consistent high quality service to clients.
- Highly developed presentation skills including the ability to explain technical, complex issues to a wide range of stakeholders.



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- Superior judgment and analytical, communication and consultation skills.

**PROBLEM SOLVING:** Describe difficult or challenging situations the position is typically expected to solve and the assistance available (See PP [Slides 41-43](#)).

- The position is constantly challenged with a multiplicity of decision making situations in dealing with complex/sensitive client files. Innovative solutions are often needed to meet clients' needs.
- The position also determines if Public Trustee will assume legal jurisdiction, and if so, to what extent.
- The position must keep at the leading edge of best practices in Trust Administration and be responsive to rapid changes in the external social and psychological environment in society.
- The position makes complex decisions regarding the interpretation of the mission and mandate of the Public Trustee as it relates to Trust Administration.
- The position must coordinate with all other areas of the OPGT and external stakeholders in providing legal and trust administration solutions for clients with complex needs.

**RELATIONSHIPS/CONTACTS:** Identify internal and/or external clients, partners and stakeholders with whom your position has the most influence 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 PP [Slides 44-46](#)).

Clients	Frequency	Nature and Purpose of Contact
<b>Internal</b>		
Public Trustee	Frequent (several times per week)	Strategic direction and alignment
Assistant Public Trustee, Operational Services	Daily	Complex client case file discussions, performance management issues
Assistant Public Trustee, Strategic Support Services	Frequent (several times per week)	Resolution of issues between business units
Director of Risk Management and Quality Assurance	Frequent (several times per week)	Resolution of policy or quality assurance issues
Trust Administration Supervisors	Daily	Complex client case file discussions, performance management issues
Trust Administration Intake Coordinators	Daily	Complex potential client case discussions
Public Trustee Representatives	Daily	Complex client case file discussions
Administrative Trust Assistants	Frequent	Client Service Delivery matters
Financial Advisors	As required	Complex client case file discussions
Investigators	Frequent	Complex client case file discussions
<b>External</b>		
Judiciary, Legal Community	As required	Complex client case file issues, clarification of OPT role
Government of Alberta Ministry Representatives	As required	Resolution of client case file issues, strategic alignment and cross-Ministry initiatives
Human Services Organizations	As required	Collaboration to meet needs of vulnerable clients
Clients	As required	Address escalated client case file issues
External Stakeholders	As required	

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Public	As required	Negotiate special services for OPT clients
	As required	Respond to challenging public requests/inquiries/complaints

**IMPACT AND MAGNITUDE OF JOB (SCOPE):** Identify how the position directly affects results, and the extent to which stakeholders are affected by the outputs. Provide recent examples (See PP [Slides 47-49](#)).

- The position demands a quick response to a large volume of legal documents served on the Public Trustee.
- The position is directly responsible for clients in the Represented Adult categories. The position requires the exercise of a wide scope of discretion in dealing with the financial affairs of vulnerable individuals. Consequence of error can result in substantial losses to estates and legal claims against the government. The incumbent is responsible for the management of approximately 20 to 40 staff full-time staff members in the represented adult area within Trust Administration.
- The incumbent must establish and maintain administrative controls to ensure that all work adheres to established laws and policies.
- The incumbent, in a fiduciary relationship, is responsible on behalf of the Public Trustee for the proper administration of client assets. The position is accountable for directing administration of approximately 2,000 represented adult client files.

**CHANGES SINCE LAST REVIEW:** What significant changes have occurred in your job, from the last review (See PP [Slides 50-51](#)).

The position has assumed more complex decision making duties regarding the legal affairs of clients and the incumbent must interpret, direct and solve legal issues for clients in consultation with the OPGT legal section.

**COMPARABLE POSITIONS:** List comparable GoA benchmarks (See PP [Slide 52](#)).

Manager, Family Support for Children with Disabilities M420-05  
Public Guardian, Justice and Solicitor General M420-14

## 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](#))

<b>Incumbent</b>	_____	_____	_____
	Name	Signature	Date (yyyy/mm/dd)
<b>Supervisor</b>	_____	_____	_____
	Name	Signature	Date (yyyy/mm/dd)
<b>Division Director/ADM</b>	_____	_____	_____
	Name	Signature	Date (yyyy/mm/dd)

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