



## Job Specification

**Position Title:** TRAINING AND CASE MANAGEMENT OFFICER  
**Job Code:** AMAPCEO - Social Prog AdmAma UnitASL17, 17ASL  
**Job ID:** 34020

### Purpose of Position:

To provide specialised case management, training and related operational support for OPGT Property Guardianship Services management and staff in an assigned portfolio.

To plan, co-ordinate and provide leadership in managing certain issues, including making financial decisions and instructing legal counsel regarding the trusts and interest in estate files.

### Duties/Responsibilities:

#### 1. Training & Learning Resources

-Acquires and maintains in-depth and up-to-date specialised knowledge of all aspects of the assigned subject area portfolio (eg: areas such as: the Ontario Disability Support Plan, extended health care, public and private benefit schemes, long-term-care, homes for special care, real property, vehicles, life insurance, property and liability insurance, estate administration, property management, field investigations, information gathering, privacy and disclosure rules, OPGT IT systems, etc).

-Participates in/provides training needs assessment, specialised training content development and assessment/feedback tools for the assigned portfolio.

-Coordinates/oversees training arrangements and conducts training.

-Evaluates qualitative and quantitative feedback from training recipients to make report to senior management in order to recommend and develop training content/delivery improvements.

-Develops, maintains and ensures availability/access to learning-related tools and resources for staff. Ensures their alignment with related tools and resources developed by others.

-Ensures the timely provision of current information regarding assigned subject areas, by updating the policy and procedure manuals and providing training and support in applying new policies and procedures, etc.

-Provides staff with specialised technical information on request (eg: interpretations/accepted application of insurance provisions).

#### 2. Operational Support/Case Management

-Manages assigned trust files and 'interest in estate sub-files, including ensuring compliance with all applicable laws and orders; making high level decisions in relation to the timing and amount of disbursements from the trust files; reporting as required; and providing instructions to legal counsel regarding legal actions where applicable.

-Assists on an exceptional basis with the management of very unusual and highly complicated client assets or issues, as assigned.

-Assists by providing specialised research, input, advice, responses and claims in relation to class actions affecting clients and estates.

-Reviews cases and liaises with internal staff and external contractors (eg: realty sale contractors, property managers, clean and search contractors, and other external service providers), to conduct specialised research and gather/validate information; and document files used as supporting information for financial decisions on passing accounts, answering complaints, preparing for specialised testimony in court, addressing questions posed by external auditors, and gathering additional client information in response to class action requests, etc.

-Works with other OPGT departments to ensure that maintenance payments for certain types of residential care (eg: Homes for Special Care) are accurate and up-to-date, following-up to ensure action is taken as required.

### 3. Operational Policy/Program Design and Implementation

-Monitors legislative, policy and operational changes in the subject area(s) and related external programs and services, to identify and assess impact of changes, emerging issues and trends that affect the OPGT

-Makes associated program design, operational and training recommendations to senior management to address identified issues and required changes

-Participates in the development, revision, distribution and communication of policies and procedures.

-Provides case management, statistical and qualitative reports to staff and supervisors.

-Drafts specifications for Requests for Proposals (i.e. on the outsourcing of Property Management function for clients).

-Drafts forms and related documents as required.

### 4. Issues Management

Acts as the central point of contact/co-ordinator for the resolution of issues relating to assigned subject areas (ie: fact gathering, expediting, providing approved instructions on response development), and co-ordinates with the Team Leader to discuss (potentially) systemic issues.

### 5. Other duties as assigned.

#### **Knowledge:**

-Sound knowledge of OPGT Client Services role, policies, standards and procedures, and OPGT mandate, related policies, procedures, in order to undertake/participate in developing and delivering specialised training (eg: on legislation, policy, case management, etc), and provide specialised technical and operational support within the assigned portfolio.

-In-depth knowledge of related legislation and regulations (eg: the Substitute Decisions Act, Health Care Consent Act, Mental Health Act, Public Guardian and Trustee Act, etc), to provide technical and operational case-related financial and legal decisions and related training/learning support within the assigned portfolio.

-Understanding of major/common sociological issues (eg: re vulnerable adults living independently), the legal system, court procedure, real estate and trust management, community based health and social services agencies, to participate in/discuss policy and procedural matters and recommend options to resolve local and systemic CS problems.

-Knowledge of adult learning principles and techniques, to develop and deliver training, and provide learning tools.

-Research, analysis, evaluation and problem-solving skills to work with operational focus in order to develop specialised training materials; gather information; conduct research; review documents/files for the purpose of passing accounts, answering complaints, preparing for testimony in court, addressing questions posed by external auditors, etc; and provide case management, statistical, and qualitative reports to staff and supervisors.

-Understanding of OPGT and OPGT Client Services policy and procedure development to participate in their development.

-Very strong client service skills, to provide training, learning and operational support for the Branch.

-Strong work/project management and co-ordinating skills, to plan, prioritise, balance and control diverse, concurrent activities, incorporate last minute changes, and ensure timely results.

-Strong oral/written communications, consultation and interpersonal skills to: develop business relationships, build networks with internal and external service providers, partners/stakeholders; consult; represent the OPGT effectively; prepare and present training; prepare/draft reports, content for submissions, briefings, policy/issue papers, etc.

-Understanding of OPGT finance and accounting to track and ensure maintenance payments on Homes

for Special Care files are accurate and up-to-date, and follow up as required.

-Sound understanding of IT to appreciate how technology can be used to develop and deliver tools that support CS efficiency and effectiveness (eg: forms, database, training tools).

-Proficiency in using common office software and customised applications available in the Branch, in order to research; analyse; develop materials, reports and recommendations; prepare draft issues management briefings and associated materials; plan and co-ordinate activities; design and deliver training, etc.

**Judgement:**

Works under the general supervision of the Manager, Provincial Programs with day-to-day technical guidance from the TL Training & Support and the TL Case Support. Is guided by applicable legislation, regulations, agreements, policies, procedures and guidelines, and adult education principles.

Judgment is exercised in:

-Making financial and legal decisions for trusts and interest in estate files.

-Researching content and assess specialised training/information needs, and designing, developing, delivering and evaluating training for all PGS staff regarding portfolio areas of specialisation, using appropriate teaching methods and curriculum design.

-Modifying training design to meet specific or individual needs, changing requirements and varying skill/proficiency levels.

-Ensuring the accuracy, timeliness and relevance of curricula and training materials and associated learning tools and materials.

-Recommending training program/policy revisions and improvements.

-Acting as the central point of contact for the resolution of issues relating to assigned subject areas.

-Ensuring accuracy and completeness in information, research, reviews and file documentation for passing accounts, answering complaints, preparing for testimony in court, addressing questions posed by external auditors, responses to class action requests, etc.

-Initiating appropriate and timely action to ensure that maintenance payments on Homes for Special Care files are accurate and up-to-date.

-Assisting in the management of very unusual or highly complicated client assets, as assigned.

-Identifying possible systemic and/or major issues and raising them with the Team Leader.

-Prioritising and co-ordinating multiple concurrent activities effectively to ensure on-time delivery of complete and reliable outputs.

**Accountability - Programs:**

-Designing, developing, delivering and evaluating training and learning programs with respect assigned subject matter portfolio.

-Ensuring quality, effectiveness and timeliness of curricula and training/learning materials and technical support for assigned portfolio subjects.

-Recommending training program/policy revisions and improvements.

-Being the financial and legal decision maker for trusts and interest in estate files.

-Providing specialised subject area knowledge to support portfolio case management.

-Providing technical guidance and/or individual coaching to training groups and/or individual participants.

**Accountability - Finance & Material:**

-Contributes to planning for training and learning programs.

-Develops and maintains training and learning-related tools, forms, etc.

-Makes financial and legal decisions for trusts and interest in estate files.

-Ensures maintenance payments on Homes for Special Care files are accurate and up-to-date, follows-up to ensure action.

-Ensures the security of records and files in own keeping.

**Accountability - Impact of Errors:**

Decisions on training content and design directly influence the knowledge and skills of staff with regard to the assigned subject matter portfolio.

-Failure to ensure the integrity and completeness of research, analyses and evaluations could result in flawed needs assessments, training content and related materials, resulting in widespread misinformation and poor skills among staff.

-Poor financial and legal decisions could result in loss for clients`/estates and failure to provide for services required by dependent clients.

-Poor case management support could result in delays, errors, costly corrections, client inconvenience and damaged relationships with clients, their representatives and service providers.

-Poor issues management co-ordination and support regarding the area of specialisation could result in the OPGT being exposed to risk and client/public censure.

**Contact - Internal:**

-Frequent contact with Branch management and staff, and IT and other specialists to consult on learning/operational support needs; obtain specialised content information for training and tools development; co-ordinate and provide training and operational support; obtain feedback; and co-ordinate issues management for the area of specialisation.

-Participates on internal committees, projects, task forces etc, to provide training and operational input and advice concerning the assigned portfolio.

-Frequent contact with Branch management and staff, legal counsel, etc. to advise on and/or make financial and legal decisions (eg: on individual case management, class action claims, etc).

-Regular contact with internal staff to ensure maintenance payments on Homes for Special Care files are accurate and up-to-date, and follow up to ensure action as required.

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-Regular contact with internal staff to ensure maintenance payments on Homes for Special Care files are accurate and up-to-date, and follow up to ensure action as required.

**Contact - External:**

-Regular contact with service providers (eg: contractors such as realty sale contractors, property managers, clean and search contractors, and other external service providers) and representatives of clients to gather case information; conduct research and reviews; document files for the purpose of passing accounts, answering complaints, preparing for testimony in court, addressing questions posed by external auditors; and to gather additional client information in response to class action requests.

-Regular contact with counterparts in municipal, federal and provincial governments to discuss new initiatives/developments affecting the portfolio area of specialisation and exchange information.