

Business Plan

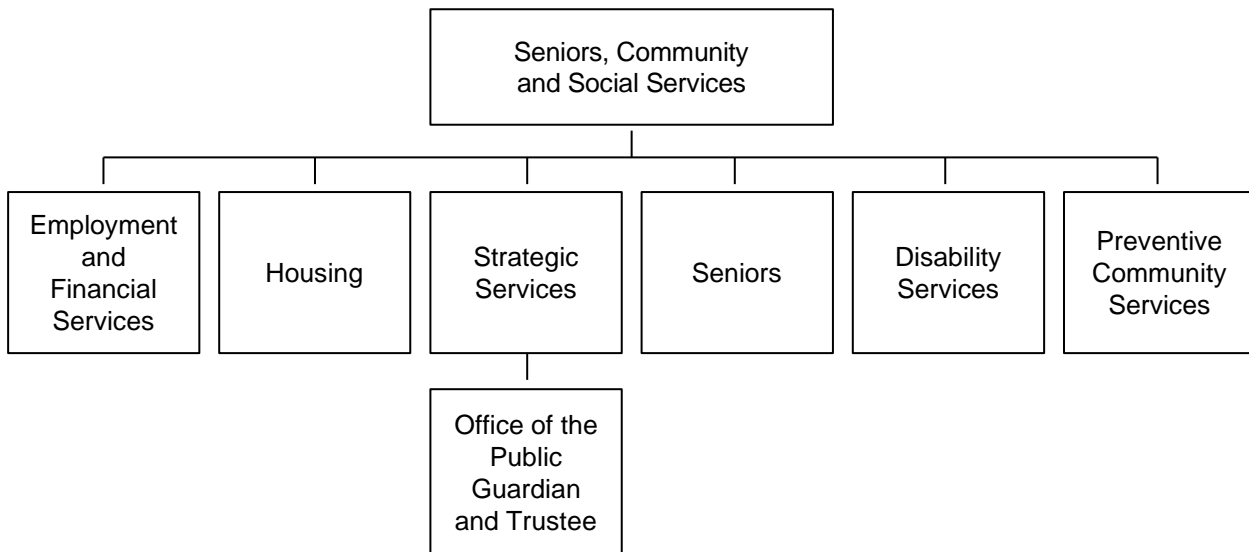
Office of the Public Guardian and Trustee

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Business Plan 2024-27

Ministry Fact Sheet – Mandate and Structure

The Office of the Public Guardian and Trustee (OPGT) is a part of the Government of Alberta under the Strategic Services division of the Ministry of Seniors, Community and Social Services.



Seniors, Community and Social Services supports Albertans’ participation and inclusion in their communities and the workforce by delivering high-quality social programs to those who need them, when they need them. The ministry works with community partners and civil society to ensure supports and services are delivered in a timely, responsive manner. This approach puts the individual at the centre of an integrated service delivery model and recognizes the unique circumstances, experiences and strengths of individuals, families and communities.

The OPGT works closely with partners – organizations and individuals – to support the provision of high-quality services in a client-centric manner to vulnerable Albertans. The OPGT makes decisions for individuals who are unable to make personal and financial decisions for themselves; provides legal guardianship to represented adults; administers the property of represented adults, minor children and deceased persons; receives and can investigate complaints against legal guardians, trustees, co-decision-makers, and agents named in an enacted personal directive; and provides information, education and support to the public, private guardians and private trustees.

The Public Guardian:

- makes personal and legal decisions of a non-financial nature as court-appointed guardian for represented adults who have no one else willing or able to do so;
- may act as agent under a personal directive when no one else is willing or able to act as decision-maker; and
- may make one-time health and placement decisions for adult Albertans when no one else is willing or able.

The Public Trustee:

- makes financial decisions and legal decisions of a financial nature as court-appointed trustee for represented adults who have no one else willing or able to assist;
- administers and protects the financial and physical assets and property of represented adults, minors and estates, when required or appropriate; and
- acts as trustee for permanent guardianship orders.

The OPGT aims to ensure that personal and financial decisions are made, and assets are protected, so that all Albertans can live with dignity, maximize their autonomy and realize their full potential. The OPGT's Enterprise Risk Management framework encompasses a robust, comprehensive approach to identifying, assessing and managing any operational, project or strategic risks that threaten to interfere with fulfilment of the Office's mandate.

A detailed description of the OPGT and its programs and initiatives can be found at: <https://www.alberta.ca/office-public-guardian-trustee.aspx>.

2024-27 Business Plan

Outcome 1

Albertans receive modern and high-quality guardianship, trusteeship and related services.

The OPGT successfully fulfills the guardianship, trusteeship and related needs of Albertans by maintaining quality standards and focusing on the sustainability, modernization and risk management of our services.

Key Objectives

- 1.1 Enhance Guardianship services policies and procedures to ensure that Albertans receive provincially consistent decisions and to improve the alignment of related procedures between OPGT and key stakeholders.
- 1.2 Improve internal review processes for *Adult Guardianship and Trusteeship Act* court applications to ensure that the review services are provided to vulnerable Albertans in a more timely manner.
- 1.3 Streamline staff training to make it more accessible and user-friendly in order to support staff to provide improved services to Albertans.
- 1.4 Implement and leverage new technology to increase efficiencies, serve clients in a more timely manner and reduce the use of manual processes.

Initiatives Supporting Key Objectives

- In 2024-25, \$27.9 million is allocated to provide high-quality guardian and trustee services to vulnerable Albertans.

Performance Metrics

1.a Performance Measure: Percentage of health care decisions under Specific Decision-Making that are made within three working days of all information being received

The process of making one-time health care and placement decisions is known as Specific Decision-Making. The OPGT’s responsiveness in these situations is a reflection of operational efficiency and quality management. In 2022-23, 86 per cent of health care decisions under Specific Decision-Making were made within three working days of all the information received. Certain decisions are more complex and warrant additional time to ensure the best decision is made.

Targets	2024-25	2025-26	2026-27
	90%	90%	91%

1.b Performance Indicator: Annual financial audit recommendations

As a body that manages and makes often significant financial decisions on behalf of represented Albertans, ensuring that the OPGT’s financial management is of the highest standard is critical. Annually, the Auditor General of Alberta conducts an independent examination, or audit, of the OPGT’s financial statements. Any recommendations arising from the audit must be promptly addressed. This indicator tracks the number of recommendations arising each fiscal year. The intent is for no recommendations to be triggered.

	2018-19	2019-20	2020-21	2021-22	2022-23
Audit recommendations	0	0	0	0	0

1.c Performance Indicator: Adult Albertans with private guardians or private trustees as a percentage of all represented adult Albertans

Friends or family members often make ideal guardians or trustees, and the OPGT encourages the use of private guardians or trustees over a Public Guardian or Public Trustee in all cases for which it is feasible. In 2022-23, 70 per cent of all adult Albertans with a guardian or trustee had a private guardian or trustee.

	2018-19	2019-20	2020-21	2021-22	2022-23
Proportion of represented adult Albertans with a private guardian or trustee	61.1%	66.6%	67.6%	68.9%	70.0%
Proportion of represented adult Albertans with a public guardian or trustee	38.9%	33.4%	32.4%	31.1%	30.0%
Total	100%	100%	100%	100%	100%