

**TITLE: SUPERVISING DEPUTY PUBLIC GUARDIAN / PUBLIC ADMINISTRATOR****BOARD APPROVED:****FLSA: Non-Exempt****BARGAINING UNIT: Misc.**

DEFINITION

Under direction of the Social Services Director, organizes and supervises staff and the daily operations of the Public Guardian / Public Administrator program. Provides complex and sensitive management of legal conservatorship and estate administration cases mandated by the court for county residents; directs and approves the review of intricate financial and legal documents. This position requires extensive knowledge of conservatorship and estate administration services as specified by the Probate Code and Welfare and Institutions Code. Performs related administrative and professional work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Social Services Director or their designee. Trains, evaluates, and supervises the work of deputies, technical and clerical staff assigned to the Public Guardian / Public Administrator program.

CLASS CHARACTERISTICS

This is a single classification position within the Department of Social Services, which provides direction and supervision to Public Guardian / Public Administrator staff.

EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)

- Supervises and directs the daily activities of the Deputy Conservator/Public Guardian/Public Administrators, Rep Payee Program and office staff through appropriate delegation, support, and work supervision while maintaining strict confidentiality
- Plans, prioritizes and assigns cases, tasks and projects; counsels, trains and coaches staff on professional responsibilities and technical skills; monitors work and evaluates performance; identifies training needs and coordinates training for staff
- Meets regularly with staff to solicit input and offer guidance; analyzes and evaluates issues and proposals, develops recommendations, and directs the implementation of solutions
- Reviews and approves documents, case files and billing records; assures that appropriate services are provided
- Analyzes trends, and evaluates program requirements and resource utilization; coordinates program planning and evaluation; coordinates efforts to integrate services with other programs

- Facilitates and guides development of conservatee competency assessments and treatment plans; assesses case management work quality and conformance to standards
- Appears in the Superior Court in matters pertaining to the legal requirements of conservatorship and estate management
- Investigate, review and analyze individual cases and court documents to determine the need for a conservator, and appropriateness of cases for estate administration
- Works with Coroner on indigent burial investigations
- Supervises the marshalling of assets, determination and definition of debts, and development of estate management plans
- Supervises the pursuit of financial benefits to which conservatees may be entitled; provides advocacy for conservatees with Social Security and other State and Federal Agencies; represents the conservatee and estate's interests in dealing with the IRS, banks and other financial institutions
- Directs the arrangements for physical care and custody of conservatees incapable of providing for their own needs; develops and enhances cooperative professional relationships with local community agencies significant to the continuum of care for conservatees
- Supports and enhances the conservatees' emotional stability; explains complex legal policies, probate processes, conservatorship, financial arrangements, and responsibilities to conservatees and their families; explains plan of care to conservatees, families and significant others; provides advocacy when needed
- Provides consultation and training to other organizations in the community on conservatorship; meets with the public to communicate the functions of the Public Guardian, Public Administrator and Rep Payee programs
- Performs other related duties as assigned

QUALIFICATIONS

Knowledge of:

- Welfare and Institutions Code, Probate Code, Health and Safety Code, and other applicable laws and regulations relating to estate management and disbursement
- County, state and federal laws, statutes, rules, ordinances, codes and regulations pertaining to guardianship, conservatorship, probate administration, and case management
- Applicable Federal, State, County, Department, and Division laws, regulations, policies and procedures
- Principles and practices of legal, financial, ethical and professional rules of conduct
- Social Service programs and resources available to the disabled, aged and mentally ill
- Local community resources and various community services programs
- Principles and practices of effective case management and estate management
- Social program and justice system administrative processes and protocols
- Modern office practices, methods and computer equipment
- Record keeping principles and procedures
- Computer applications related to the work
- English usage, grammar, spelling, vocabulary, and punctuation
- Techniques for dealing effectively with and providing a high level of customer service to all individuals contacted in the course of work

Ability to:

- Lead, schedule and supervise staff, provide skills training, delegate tasks and authority

- Analyze problems, identify solutions, recommend and implement methods, procedures, and techniques for resolution of issues
- Make responsible life decisions for helpless, mentally ill and/or incompetent individuals
- Analyze and evaluate situations accurately, draw logical conclusions and adopt or recommend an effective course of action
- Tactfully and effectively communicate with persons exhibiting symptoms of mental disorder, senility, and/or incompetence
- Organize and administer estates
- Maintain complex financial records
- Work independently and as a team member
- Use English effectively to communicate in person, over the telephone and in writing
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities and meet critical time deadlines
- Use tact, initiative, prudence and independent judgment within general policy, procedural and legal guidelines
- Maintain significant flexibility in daily operations and decision making
- React calmly and professionally in emergency, emotional, and/or stressful situations
- Maintain high personal standards of ethics and integrity
- Make sound, educated decisions
- Make accurate mathematical, statistical and financial calculations
- Establish and maintain effective working relations with co-workers, other county employees and representatives from other county, state and federal agencies

Education and Experience:

Any combination of training and experience which would provide the required knowledge, skills and abilities is qualifying. A typical way to obtain the required qualifications would be:

- Equivalent to the completion of twelfth (12th) grade
- Graduation from an accredited college or university with an Associate's degree in social services, mental health, legal, or other related fields, a Bachelor's degree is desired; and three (3) years of increasingly responsible social work duties in a public or private social work or Public Guardian or Public Administrator agency. Two years of related work experience may be substituted for each one year of required education.
- Certification by the California State Association of Public Administrators, Public Guardians, and Public Conservators or the ability to obtain the certification within four (4) years of employment
- Other combinations of education and experience may be considered.

License and Special Requirements:

- Possession of, or ability to obtain and maintain, a valid California Class C Driver License and a satisfactory driving record is required. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.
- Must pass a security clearance investigation and fingerprinting for purposes of search of local, state and national fingerprint files

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various County and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to

communicate in person, before groups, and over the telephone. This is partially a sedentary office classification; the job also involves field investigation of clients and/or property as appropriate. Standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard, typewriter keyboard, or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects, up to 50 pounds, as necessary to perform job functions.

WORKING CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and partially in the field and may be exposed to substandard living areas including animal waste, vermin, illness/disease, strong odors, cold and hot temperatures, inclement weather conditions, road hazards, confining workspace, chemicals, mechanical, and/or electrical hazards, and hazardous physical substances, dust, scents and fumes. Employees will need to interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures. Employees will be called for crisis situations at irregular hours other than normal working hours, including nights, weekends and holidays.

**EQUAL OPPORTUNITY EMPLOYER / AMERICANS WITH DISABILITIES ACT
COMPLIANT / VETERANS' PREFERENCE POLICY / DRUG-FREE WORKPLACE**

(6/29/21)