



TITLE: DEPUTY CONSERVATOR/PUBLIC GUARDIAN/PUBLIC ADMINISTRATOR

BOARD APPROVED: ~~OCTOBER 21, 2008~~

FLSA: Non-Exempt

BARGAINING UNIT: Misc.

DEFINITION

Under direction of the Supervising Deputy Conservator/Public Guardian/Public Administrator assists in investigations, recommendations and administration of conservatorships and public administration cases; provides administrative and fiscal support in department activities and programs. .

SUPERVISION RECEIVED AND EXERCISED

Provides lead direction to subordinate staff in the department.

CLASS CHARACTERISTICS

In this journey level classification, incumbents manage a caseload of complex and difficult conservatee services; performs complex legal, financial and social services casework functions, including risk assessment. May provide technical direction, training and consultation to others and/or function in a lead worker capacity.

EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)

- Conducts investigations of proposed conservatees and public administration cases; prepares related reports.
- Visits clients on a regular or as-needed basis, and prepares visitation reports.
- Provides for the care, treatment and supervision of conservatees; acts as advocate in all matters pertaining to conservatees; makes referrals to other social service agencies as appropriate; makes appointments with physicians and other professionals as needed.
- Marshalls the assets of conservatees and public administration cases, deposits monies received on behalf of estates and others in accounts authorized by State law controlling the authority of Public Guardians and Public Administrators; maintains and balances conservator account; disburses and closes estates; opens burial trusts and makes funeral arrangements.
- Maintains contact and communication with conservatees and public administration cases, their families, mental health case managers, attorneys, care providers, and other client service related agencies.
- Provides client transportation to medical or other appointments as needed.
- Inventories, cleans, disposes of client property as appropriate.

- Attends meetings, workshops and training sessions as appropriate to enhance job knowledge and skills.
- Performs general office work as necessary, including answering the telephone, typing reports and correspondence, entering data into the computer, copying and filing documents, etc.
- Provides direction and indirect supervision of department support staff as assigned.
- Performs related work as required.

QUALIFICATIONS

Knowledge of:

- Probate and Welfare and Institutions Code sections pertinent to conservatorships, guardianships and public administration;
- Basics of abnormal psychology and individual/group behavior;
- Social security, veterans and welfare systems;
- Principles of estate management;
- Community resources available to the elderly and mentally ill;
- Administrative principles and techniques;
- Applicable Federal, State, County, Department, and Division laws, regulations, policies and procedures;
- 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:

- 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;
- Deal effectively with persons exhibiting symptoms of mental disorder, senility, and/or incompetence;
- Organize and administer estates;
- Maintain complex financial records;
- Effectively prepare and control the department budget;
- Type with accuracy and adequate speed on a typewriter and computer;
- 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;
- Operate modern office equipment including computer equipment and specialized software applications programs;
- Maintain significant flexibility in daily operations and decision making;
- Read and interpret various materials pertaining to the responsibilities of the job;
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work;

- Assemble and analyze information and prepare written reports and records in a clear and concise manner;
- React calmly and professionally in emergency, emotional, and/or stressful situations;
- Establish and maintain effective working relationships with those contacted on the job.

Education & 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:

- Graduation from an accredited college or university with an Associates Degree, with focus of education related to social services, mental health, legal, or other related fields.
- A minimum of three (3) years experience in social service, mental health, legal or other related fields.
- Other combinations of education and experience may be considered.

License & 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.
- Requires ability to be bonded.

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 30 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 occasionally be exposed to 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 and fumes. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

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

(10/21/08)