



SUPERVISING DEPUTY PUBLIC GUARDIAN

DEFINITION

Under general management direction, provides direction, coordination and planning for the activities of the Public Guardian Office; supervises support staff in the guardianship, conservatorship and Representative Payee programs; monitors Medi-Cal Administrative Activities/Targeted Case Management activities.

DISTINGUISHING CHARACTERISTICS

This is the first supervisory level classification in the Public Guardian class series, responsible for assisting the Public Guardian/Public Conservator in policy development, program planning, fiscal management, administration and operation of the Public Guardian Office of the Department of Human Services. The incumbent is responsible for supervising the day-to-day activities and functions of the Public Guardian Office, may take responsibility for investigating referrals of a sensitive and/or urgent nature and may carry a modified case load that includes the most serious, difficult and/or complex guardianships/conservatorships. This class is distinguished from the designated Public Guardian/Public Conservator in that the latter has overall administrative and programmatic responsibility for all functions of the Public Guardian Office.

EXAMPLES OF DUTIES (Illustrative Only)

- Assists in the development and implementation of goals, objectives, policies, internal controls, accounting procedures and work standards for the Public Guardian Office; provides input into the budget process.
- Assists the Public Guardian/Public Conservator in planning, organizing, directing, and coordinating the activities and programs of the Public Guardian Office.
- Represents the Public Guardian/Public Conservator in court; prepares court documents and testifies in court regarding the recommendation to be appointed guardian or conservator.
- Plans, assigns, supervises, reviews and evaluates the work of support staff directly or through subordinate staff; trains staff in work procedures.
- May interview candidates and make hiring recommendations to the Public Guardian/Public Conservator and Director of Human Services.
- Advises staff regarding the interpretation of laws and regulations; recommends the modification or adoption of procedures to meet changing requirements.
- Supervises and monitors performance and documentation of activities eligible under Medi-Cal Administrative Activities/Targeted Case Management to ensure compliance and receipt of available revenues.
- Evaluates employee performance, counsels employees and effectively recommends initial disciplinary action and other personnel decisions.
- Develops, recommends, and implements management-approved improvements and practices in the Office; makes recommendations on procedures, forms and work flow; ensures compliance with state and federal program mandates.
- Represents the Public Guardian/Public Conservator before the Court and with other County departments, governmental and other agencies and community groups; acts as primary program contact for audits.

- Reviews and analyzes the background of individuals to determine need for a guardian or conservator or Representative Payee services; discusses case with physicians, mental health workers, court investigators and other agencies.
- Interviews the client, family, friends and/or neighbors to gather information on the client's needs; develops and implements a care plan for the client.
- When conservator or guardian has been appointed, interviews client and relatives to determine the nature and location of all assets and debts of client; secures assets and determines a plan to manage them on behalf of client.
- Assists the client in pursuing other financial benefits to which he/she may be entitled; acts as an advocate for the client with appropriate agencies regarding Social Security, Medi-Cal, Veteran's Services, State Disability and other benefits; represents client with the I.R.S., banks and other financial institutions.
- Arranges for the physical storage of personal property of the client; manages real property and, if necessary, arranges for the sale or disposition of property; processes all legal documents and procedures on behalf of the client.
- When acting as conservator for a person with a mental disorder, discusses with mental health professionals the prognosis for release; assists clients in location of housing or other placement; monitors activities; may recommend and assist in returning the client to a locked facility.
- Explains complex legal policies, conservatorship, financial arrangements, case management and purchase of services; answers questions from clients and family; provides information and direction to community members.
- Assists deputies in communicating effectively with diverse parties or agencies regarding issues or disputes.
- Attendance and punctuality that is observant of scheduled hours on a regular basis.
- Performs related work as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices of employee supervision, including work planning, scheduling, training, work evaluation and discipline.
- Principles and practices of administration, including goal setting, policy and procedure, and budget development.
- State and local laws pertaining to guardianship, conservatorship, elder care and case management.
- Welfare and Institutions Code, Probate Code, Elder Law, and other applicable laws and regulations relating to estate management and disbursement.
- Principles and practices of effective case management and estate management.
- Social Service programs and resources available to the disabled, aged and mentally ill.
- Principles and techniques of effective interviewing techniques and counseling interventions.
- Medical terminology, including common procedures and medications.
- Business English and arithmetic.

Skill in:

- Planning, organizing, assigning, supervising, reviewing and evaluating the work of Deputy Public Guardians and support staff.
- Providing training in work procedures for staff.
- Developing, implementing and interpreting goals, objectives, policies, procedures, work standards and internal controls.
- Administering estates and safekeeping assets and personal effects.
- Conducting detailed investigations, obtaining information, establishing facts and drawing valid conclusions.

- Interpreting, applying and explaining County policies and adhering to laws related to Public Guardian/Public Conservator functions.
- Organizing and maintaining accounting, inventory, appraisal and other detailed business records.
- Preparing clear and concise correspondence, reports and other written materials.
- Exercising initiative and sound independent judgement within established guidelines.
- Negotiating difficult and challenging situations.
- Establishing and maintaining effective working relationships with those contacted in the course of the work.

Other Requirements:

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Environment: Work is primarily performed indoors in a standard office setting.

Physical: Primary functions require sufficient physical ability to work in an office setting and operate office equipment; vision in the normal visual range with or without correction sufficient to read computer screens and printed documents and to operate equipment; hear in the normal audio range with or without correction. **Frequent** sitting; wrist and arm motions and upward/downward flexion of neck; fine finger dexterity of both hands, ability to grasp and hold; lifting, carrying or pushing objects that weigh up to 15 lbs. **Occasional** standing and bending, walking and reaching; lifting, carrying or pushing objects that weigh 16 – 40 lbs. **Infrequent** climbing; lifting, carrying or pushing objects that weigh more than 40 lbs.

Must possess a valid driver's license. Individuals who do not meet this requirement due to physical disability will be reviewed on a case by case basis. Must be willing to work after hours, weekends and holidays as needed.

Education and Experience:

Where college degrees and/or college course credits are required, degrees and college units must be obtained from an accredited college or university. Courses from non-accredited institutions will not be evaluated for this requirement.

Education: Equivalent to graduation from an accredited four year college or university with major coursework in business or public administration, pre-law, social services, psychology or a closely related field,

-and-

Experience: Two years' experience in social work or the administration of complex guardianship and conservatorship cases at a level equivalent to the County's class of Deputy Public Guardian II.

A Master's degree in social work, marriage and family counseling, psychology or a related field is highly desirable.

WORKING CONDITIONS

As required by Internal Revenue Service Publication 1075, individuals in positions that have access to Federal Tax Information (FTI), will be subject to a background investigation and a criminal history check. In addition, individuals hired into positions that have access to FTI will be re-investigated at least once every ten (10) years.