



OCTOBER 2018
AUGUST 2019
FLSA: NON-EXEMPT
Bargaining Unit: SU
JCN: 7414

SUPERVISING DEPUTY PUBLIC GUARDIAN SUPERVISOR

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** Under general direction, plans, supervises, organizes, coordinates, and reviews the work of staff performing public guardianship duties; performs a variety of sensitive or complex duties in the review of prospective clients to determine whether they meet the financial, medical, social, and psychological criteria for conservatorship or guardianship; assumes responsibility for a caseload with respect to administering the personal and financial affairs of the conservatee in accordance with mandated laws, rules, ordinances, codes, and regulations; provides responsible staff support to assigned manager in areas of expertise; and performs related duties as assigned.~~

SUPERVISION RECEIVED AND EXERCISED

~~Receives general direction from an assigned manager. Exercises direct supervision over assigned professional and administrative support staff.~~

CLASS CHARACTERISTICS

~~This is the firstfull supervisory-level classification in the Deputy Public Guardian class series, responsible for assisting the Public Guardian/Public Conservator in policy development, program planning, fiscal management, assigned manager in the 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, assigned staff and may take responsibility for investigating referralscases of a sensitive and/or urgent nature, and may carry a modified ease loadcaseload 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/TYPICAL JOB FUNCTIONS (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.~~
- ~~➤ Plans, organizes, assigns, supervises, and reviews the work of assigned staff responsible for the provision of public guardianship, including assessment and case management of clients who qualify under the rules and regulations of LPS (Lanterman-Petris-Short) conservatorships and probate conservatorships.~~

- ~~Evaluates employee performance; counsels employees, and effectively recommends initial disciplinary action; assists in selection and promotion.~~
- ~~Trains staff in work and safety procedures, and in the operation and use of equipment; implements training procedures and standards.~~
- ~~Conducts the full range of Deputy Public Guardian case management duties on more sensitive or complex cases.~~
- ~~Provides technical consultation and guidance to staff members on difficult cases, and manages the most complex and/or highly sensitive cases; reviews and approves assessments, reports, and other documentation prepared by staff; ensures staff complies with mandated rules, regulations, codes, and laws.~~
- ~~Represents the Public Guardian/Public Conservator in- with other County departments, governmental and other agencies, the court; prepares system, and community groups; acts as primary program contact for audits.~~
- ~~Prepares court documents and testifies in court regarding the recommendation to be appointed guardian or conservator; works with County Counsel on other legal matters, including end-of-life decision making on behalf of conservatees.~~
- ~~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 Reviews and approves County-Based Medi-Cal Administrative Activities/Targeted Case Management documents 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 requirements; conducts 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 assessments on a periodic basis for ongoing services.~~
- ~~➤ Performs related workduties as assigned.~~

QUALIFICATIONS

Knowledge of:

- ~~➤ Principles and practices of employee supervision, including work planning, scheduling, training, and assigning work, performance review and evaluation ~~and~~, discipline, and the training of staff in work procedures.~~
- ~~➤ Principles and practices of administration, including goal setting, policy and procedure, leadership.~~
- ~~➤ Ethical standards related to the estate management and personal care of conserved clients.~~
- ~~➤ Purpose and budget development authority vested within the Office of the Public Guardian.~~
- ~~➤ State Applicable federal, state, and local laws pertaining to guardianship, conservatorship, elder care, regulatory codes, ordinances, and procedures relevant to assigned areas of responsibility.~~
- ~~➤ Advanced principles and practices of case management.~~
- ~~➤ Welfare Advanced principles and Institutions Code, Probate Code, Elder Law, and other applicable laws and regulations relating to practices of effective estate management and disbursement.~~
- ~~➤ Principles and practices of effective case management and estate management budget and accounting.~~
- ~~➤ Social Service programs Methods and techniques of evaluating potential clients for conservatorship eligibility.~~
- ~~➤ Authorities vested in the court system as it relates to conservatorship and probate functions.~~
- ~~➤ Medical terminology and common procedures and medications.~~
- ~~➤ Advanced principles and techniques of effective interviewing.~~
- ~~➤ Community resources available to the disabled, aged and mentally ill for the provision of public guardianship services, including housing, social services and behavioral health resources.~~
- ~~➤ Principles and techniques of effective interviewing techniques and counseling interventions.~~
- ~~➤ Medical terminology, including common procedures and medications.~~
- ~~➤ Business English for working with groups and arithmetic fostering effective team interaction to ensure teamwork is conducted smoothly.~~

Skill in:

- ~~➤ Planning, organizing, assigning, supervising, Methods and techniques of reviewing and evaluating the /or preparing legal related documents for assigned cases.~~
- ~~➤ Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.~~
- ~~➤ The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.~~

- ~~Modern equipment and communication tools used for business functions and program, project, and task coordination.~~
- ~~Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.~~

Ability to:

- ~~Select and supervise staff, provide training and development opportunities, ensure work of Deputy Public Guardians and support staffs performed effectively, and evaluate performance in an objective and positive manner.~~
- ~~Providing training in work procedures for staff.~~
- ~~Developing, Assist in developing and implementing and interpreting goals, objectives, practices, policies, procedures, and work standards and internal controls.~~
- ~~Administering Manage a complex caseload and establish priorities for case management.~~
- ~~Administer estates, and safekeeping assets and personal effects.~~
- ~~Conducting Objectively make financial and health care decisions for clients.~~
- ~~Serve as an advocate for assigned clients with respect to estate and personal care matters.~~
- ~~Organize and maintain accounting, inventory, appraisal, and other detailed business records.~~
- ~~Conduct detailed investigations, by obtaining information, establishing facts, and drawing valid conclusions.~~
- ~~Interpreting, applying Understand, interpret, and explaining County apply all pertinent laws, codes, regulations, policies and adhering to laws related to Public Guardian/Public Conservator functions.~~
- ~~Organizing procedures, and maintaining accounting, inventory, appraisal and other detailed business records standards relevant to work performed.~~
- ~~Preparing Prepare clear and concise correspondence, reports, and other written materials material.~~
- ~~Exercising Effectively represent the department and the County in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.~~
- ~~Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.~~
- ~~Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.~~
- ~~Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.~~
- ~~Use tact, initiative, prudence, and sound independent judgement judgment within established general policy, procedural, and legal guidelines.~~
- ~~Negotiating difficult Establish, maintain, and challenging situations.~~
- ~~Establishing foster positive 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: Any combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying.~~

~~Equivalent to graduation a bachelor's degree from an accredited four-year college or university with major coursework in psychology, social services, business or public administration, pre-law, social services, psychology or or a closely related field;~~

~~-and-~~

~~Experience:~~

~~AND~~

~~Two years'(2) years of experience in social work or the administration of complex public guardianship and conservatorship cases program case management at a level equivalent to the County's County's class of Deputy Public Guardian II.~~

~~A Master's degree in social work, marriage At least one (1) year of supervisory experience is preferred.~~

Licenses and family counseling, psychology Certifications:

- ~~➤ Possession of, or ability to obtain and maintain, a valid California or Nevada Driver's License by time of appointment and a satisfactory driving record.~~

PHYSICAL DEMANDS

~~Must possess related mobility to work in a standard office setting and use standard office equipment, including a computer, and to operate a motor vehicle to visit various County and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. Standing in and walking between work areas is frequently required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification frequently bend, stoop, kneel, and reach to perform assigned duties, as well as 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 25 pounds with the use of proper equipment. Reasonable accommodations will be made for individuals on a case-by-case basis.~~

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures. Employees also work in the field ~~is highly desirable,~~ which requires going into client homes to search, inventory, marshal and manage assets according to established protocols. Employees may be exposed to hazardous physical substances, bodily fluids and variable temperature conditions with the course of the performing duties. Employees may interact with upset individuals connected with the client.

WORKING CONDITIONS

Must be willing to work after hours, weekends, and holidays as needed. 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.