



OCTOBER 2018
FLSA: NON-EXEMPT
Bargaining Unit: GE
JCN: 7411/7412

DEPUTY PUBLIC GUARDIAN I/II

DEFINITION

Under general supervision, reviews and analyzes the financial, medical, social and psychological backgrounds of clients to determine the need for conservator ship or guardianship; and manages an ongoing caseload of conservator ship and guardianship.

DISTINGUISHING CHARACTERISTICS

Deputy Public Guardian I is the entry-level class in this series. Initially under close supervision, incumbents assist and conduct basic investigations regarding conservator ship or guardianship for individuals unable to handle their own affairs. As experience is gained, casework becomes more difficult and is performed under more general supervision. This class is alternately staffed with Deputy Public Guardian II and incumbents may advance to the higher level after gaining experience and demonstrating proficiency, which meet the qualifications of the higher-level class.

Deputy Public Guardian II is the skilled professional class, responsible for detailed investigations of the need for conservator ship or guardianship. Incumbents also administer a caseload of active cases in which they attempt to locate appropriate housing for client, develop and administer a budget and assist client in meeting his normal needs. This class is distinguished from Assistant Public Guardian in that the latter is a supervisory class which also handles more complex Public Guardian cases.

EXAMPLES OF DUTIES (Illustrative Only)

- Reviews and analyzes the background of individuals to determine need for a guardian or conservator; discusses case with physicians, mental health workers, probation and other social services agencies.
- Interviews the client, family, friends and/or neighbors to gather information on the client's needs.
- Prepares court documents and testifies in court regarding the recommendation to be appointed guardian or conservator.
- When appointed as conservator or guardian interviews the client and relatives to determine nature and location of all assets and debts of the 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 may be entitled; acts as advocate for client with Social Security, Medi-Cal, Veterans Service, State Disability and other agencies; represents client in dealing with the I.R.S. and with banks and 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 person with mental disorder, discusses with mental health professionals the prognosis for release; assists clients in location of housing or other placement; monitors funds for client, follows actions of client to see that they are meeting their obligations, taking medication as directed; may recommend and assist in returning the client to locked facility.
- Explains complex legal policies, conservator ship, financial arrangements; answers questions from clients and family; provides information and direction to community members.
- Attendance and punctuality that is observant of scheduled hours on a regular basis.
- Performs other duties as assigned.

MINIMUM QUALIFICATIONS

Education and Experience:

Deputy Public Guardian I:

Education:

Equivalent to graduation from a four year college or university with major coursework in psychology, social services, business or public administration or a related field.

Deputy Public Guardian II:

Experience:

In addition to the above, one (1) year of experience in handling guardianship or conservator ship cases at a level equivalent to the class of Deputy Public Guardian I.

Other Requirements:

Must possess a valid driver's license.

Knowledge of:

- State and local laws pertaining to guardianships and conservator ships.
- Welfare and Institutions Code, Probate Code and other applicable laws and regulations relating to estate management and disbursement.
- Principles and practices of effective estate management.
- Social service programs and resources available to the disabled, aged, and mentally ill.
- Medical terminology and common procedures and medications.
- Principles and techniques of effective interviewing.
- Business arithmetic.
- Business English.

Skill in:

- Administering estates and safekeeping assets and personal effects.
- Organizing, prioritizing and coordinating work activities.
- Organizing and maintaining accounting, inventory, appraisal and other detailed business records.
- Preparing clear and concise correspondence, reports and other written materials.

Ability to:

- Conduct detailed investigations, obtaining information, establishing facts and drawing valid conclusions.
- Interpret, apply and explain County policies and adhering to laws related to Public Guardian functions.
- Exercise initiative and sound independent judgment within established guidelines.
- Deal effectively with clients who are difficult, unstable, mentally ill and potentially abusive and violent.

ENVIRONMENTAL CONDITIONS/PHYSICAL DEMANDS

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 or residential 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 and walking; wrist and arm motions and upward/downward flexion of neck; fine finger dexterity of both hands, ability to grasp and hold. **Occasional** standing, bending and reaching; lifting, carrying or pushing objects that weigh up to 15 lbs. **Infrequent** climbing; lifting, carrying or pushing objects that weigh more than 15 lbs.

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.

HISTORY

Created: JUN 1990

Revised: MAR 2013 – HRD

Revised: SEPT 2018 - HRD