



JULY 2019  
FLSA: NON EXEMPT  
Bargaining Unit: GE  
JNC: 7411/7412

## DEPUTY PUBLIC GUARDIAN I/II

### **DEFINITION**

Under general supervision or direction, performs a variety of 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; and performs related duties as assigned.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision or direction from assigned supervisory or management personnel. Exercises no direct supervision over staff.

### **CLASS CHARACTERISTICS**

*Deputy Public Guardian I:* This is the entry-level classification in the Deputy Public Guardian class series. Initially under general supervision, incumbents learn and perform routine conservatorship duties including assessing individuals for eligibility into the program, and learning the rules and regulations with respect to the different types of conservatorship, e.g., LPS (Lanterman-Petris-Short) conservatorships and probate conservatorships. As experience is gained, assignments become more varied, complex, and difficult; general supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the II-level, but are not expected to function at the same skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

*Deputy Public Guardian II:* This is the fully qualified journey-level classification in the Deputy Public Guardian class series. Positions at this level are distinguished from the I-level by the performance of the full range of duties as assigned, working independently under less supervision than the I-level, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

This class is further distinguished from the Deputy Public Guardian Supervisor in that the latter is the full supervisory-level class in the series that has responsibility for the assignment, supervision, and evaluation of the work of assigned to professional, technical, and administrative support staff.

Positions in the Deputy Public Guardian class series are flexibly staffed, and positions at the II-level are normally filled by advancement from the I-level, after gaining the knowledge, skill, and experience which meet the qualifications for and after demonstrating the ability to perform the work of the higher-level class.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)**

- Conducts intake/assessments for individuals to determine need for a guardian or conservator; areas of review include financial, medical, social, and psychological criteria; discusses case with physicians, behavioral health workers, probation, and other social services agencies; interviews clients, families,

- friends, and/or neighbors to gather information; compiles information and evidence to support the need for conservatorship and submits to County Counsel to petition for conservatorship.
- When appointed as conservator or guardian, interviews client and relatives to determine nature and location of all client assets and debts; secures assets and determines a plan to manage them on behalf of the client.
  - Performs fiscal management and Representative Payee services for assigned clients; obtains and researches any planning and financial documents; budgets the client's income; ensures that funds are available for rent/care and client personal needs; pays bills; works with financial institutions to marshal client assets and obtain funds; arranges for storage and/or disposition of property; processes all legal documents and procedures on behalf of clients; upon case closure, ensures the proper distribution of estate assets to beneficiaries and the Sheriff/Coroner/Public Administrator.
  - Ensures that clients receive the correct level of care for their needs; assesses gaps in care and coordinates services to fill these gaps; communicates with medical health providers to ensure proper care.
  - When acting as conservator for a client with a mental disorder, discusses the client with behavioral health professionals to determine the prognosis for release; assists the client in location of housing or other placement; monitors funds for client; follows actions of client to ensure that they are meeting their obligations and taking medication as directed; may recommend and assist in returning the client to a locked facility.
  - Prepares documentation outlining client interactions and communications, including services provided and service plans.
  - Assists client in pursuing other community-based resources and/or financial benefits to which they may be entitled; acts as an advocate for client with Social Security, Medi-Cal, Veterans Service, State Disability, and other agencies; represents client in dealing with federal, state, and local agencies and financial institutions.
  - Explains complex legal policies, conservatorship, financial arrangements; answers questions from client and family members; provides information and direction to community members.
  - Prepares court documents and testifies in court regarding the recommendation to be appointed guardian or conservator.
  - Performs related duties as assigned.

### **QUALIFICATIONS**

*Some knowledge and abilities may be gained by employees at the entry (I) level while in a learning capacity.*

#### **Knowledge of:**

- Purpose and authority vested within the Office of the Public Guardian.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned areas of responsibility.
- Principles and practices of effective estate management.
- Principles and practices of budget and accounting.
- Ethical standards related to the estate management and personal care of conserved clients.
- 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.
- Principles and techniques of effective interviewing.
- Principles and practices of case management.
- Community resources for the provision of public guardianship services, including housing, social services, and behavioral health resources.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Methods and techniques of reviewing and/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:**

- Administer estates, and safekeeping assets and personal effects.
- Organize and maintain accounting, inventory, appraisal, and other detailed business records.
- Conduct detailed investigations by obtaining information, establishing facts, and drawing valid conclusions.
- Objectively make financial and health related decisions for clients.
- Serve as an advocate for assigned clients with respect to resource or benefits eligibility and acquisition.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Prepare clear and concise correspondence, reports, and other written material.
- Effectively represent the department and the County in meetings with governmental agencies; the court system; 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 independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*Any combination of the required experience, education, and training that would provide the essential knowledge, skills, and abilities is qualifying.*

Deputy Public Guardian I:

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

AND

One (1) year of technical experience providing support to a public guardianship or social services program.

Deputy Public Guardian II:

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

AND

Two (2) years of experience providing professional support to a public guardianship program at a level equivalent to the County's class of Deputy Public Guardian I.

**Licenses and Certifications:**

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

**PHYSICAL DEMANDS**

Must possess 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 material 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 and controlled temperature conditions. Employees also work in the field, 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 within the course of performing such duties. Employees may interact with upset individuals connected with the client, staff, and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

**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.