

## **Mendocino County**

**JOB TITLE: DEPUTY PUBLIC GUARDIAN/ADMINISTRATOR**

**DEFINITION:**

Under direction, supervises the operations of the County's Public Guardian/Administrator's (PG/PA) Office. Supervises staff providing guardianship, conservatorship, and money management services to persons under the jurisdiction of the PG. Coordinates care, including placement and treatment, and management of income and assets of conservatees, and supervises activities related to the administration of estates as ordered by the court. Performs related duties as required.

**DISTINGUISHING CHARACTERISTICS:**

Deputy Public Guardian/Administrator is a unique single position classification in that it is supervisory yet responsibilities include direct case management and financial management services for conservatees, as well as, probate estate management. The employee in this class will receive general instructions regarding the scope of and approach to projects or assignments, but procedures and techniques are left to the discretion of the employee. This class is similar to Social Worker Supervisor II in that responsibilities include Unit supervision and direct staff supervision. Public Guardian/Administrator responsibilities lie with the Director of the Department of Social Services.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:**

Essential duties and responsibilities include the following.  
Other duties may be assigned

- Assesses the human service needs, physical and mental, of the conservatees placed under the jurisdiction of the Public Guardian.
- Develops and/or supervises the development and implementation of care plans for conservatees which address the conservatees assessed needs and level of functioning; reviews such plans on an ongoing basis and modifies as appropriate.
- Supervises the casework of the LPS Case Manager and Social Services Aide with the PA/PG Unit; oversees all assessments, investigations, and case plan development.
- Locates and directs the marshaling of all assets, including Social Security benefits, Veterans' benefits, other income, and personal and real property.
- Conducts and/or supervises all inventories for cash assets and real and personal property.

DEPUTY PUBLIC GUARDIAN/ADMINISTRATOR

Page 2

- Interviews, advises and confers with conservatees, relatives, and other collaterals as appropriate, concerning the conservatee's care and the administration of their estate.
- Completes detailed reports for the Superior Court which include the need for conservatorship, care plans to address the assessed needs, and accounting of all assets and disbursements.
- Prepares and maintains comprehensive, accurate and timely case reports, records and correspondence, including petitions and court reports; oversees the case work documentation of all those supervised.
- Provides management of estates of decedents, including the acquisition and disposition of real and personal property; oversees any necessary contracts for operation of property, liquidates assets as necessary, communicates with heirs, appraisers, creditors, title companies, etc.; examines all proofs of claimants to estates, settles all claims and bills filed against estates in PA case load.
- Arranges for the storing of personal property and assists in disposing of real and personal property through sale, public auction or disbursement to relatives, as appropriate and in accordance with all related Probate and Welfare and Institutions Code Sections.
- Supervises the development and implementation of computer based accounting and case management systems.

OTHER JOB RELATED DUTIES:

- Interprets the rules, regulations and policies of the Department to clients, staff and collaterals.
- Participates in the Adult Services Division Supervisory Meetings in the planning for the division and implementation of Department and Division policy.
- Participates in the CWDA PG/PA Northern Regional Meetings
- Performs related duties as required.

QUALIFICATIONS REQUIREMENTS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

DEPUTY PUBLIC GUARDIAN/ADMINISTRATOR

Page 3

- Knowledge of the principles, policies and procedures used in conducting comprehensive assessments of mentally and functionally disabled persons, the elderly and their families.
- Knowledge of the principles, policies and procedures used in developing care plans for mentally and functionally disabled persons and the elderly.
- Knowledge of the Welfare and Institutions Code, Lanterman-Petris-Short Act, Probate Code, and other applicable laws and regulations relating to individual and estate management.
- Knowledge of the principles, practices, and techniques of supervision and training.
- Knowledge of the regulations governing Federal Assistance, Social Security benefits, Veteran's Benefits, and other entitlements.
- Knowledge of the principles and techniques used in estate investigation and assessment to manage conservatees' or decedents assets, including real and personal property, stocks, bonds and bank deposits.
- Knowledge of the functions and procedures of the court system.
- Knowledge of social and community resources.
- Knowledge of and awareness to the needs and requirements of multi-cultural and ethnically diverse populations.
- Ability to provide leadership to unit staff; to include modeling of department communication and staff support policies, meeting facilitation skills, and problem resolution.
- Ability to work independently and with teams in the planning and development of programs.
- Ability to work effectively with mentally and emotionally disabled persons, the elderly, and their families.
- Ability to maintain complete, clear, concise, and accurate case records; to prepare and present written reports.
- Ability to supervise and train subordinates.
- Ability to read, understand, interpret and implement complex written materials.

DEPUTY PUBLIC GUARDIAN/ADMINISTRATOR

Page 4

- Ability to communicate openly, honestly, directly and respectfully with conservatees, their families, other agencies, staff and others encountered in the course of the work.
- Ability to organize and manage large volumes of paperwork; and to prioritize and delegate unit work effectively.
- Ability to respond immediately to client needs in the home and/or institutional settings.

MINIMUM QUALIFICATIONS:

Possession of a valid California Driver's License.

Education and Experience:

A combination of education and experience that would demonstrate possession of the knowledge and ability listed above. Qualifying education and experience would be the equivalent to a Bachelor's degree in Social Science, Business Administration, or related field; and two years experience in estate administration, business administration, social casework or related field investigation work. A Master's degree in Social Science, Business Administration or related field may be substituted for the experience requirement above.

PHYSICAL DEMANDS: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk; and use hands to finger, handle, or feel objects, tools, or controls. The employee is occasionally required to sit, and reach with hands and arms.

The employee must frequently lift and/or move up to 30 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception and the ability to adjust focus.

WORK ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.

DEPUTY PUBLIC GUARDIAN/ADMINISTRATOR  
Page 5

RESPONSIBILITY: Employees in this classification receive limited supervision within a broad framework of policies and procedures. Employees in this classification supervise personnel. Errors in work or judgment could result in loss of information, improper processing or issuing of legal documents, poor public relations and/or litigation against the County.

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