

CLASS SPECIFICATION



CLASS: Deputy Public Guardian I/II
ALLOCATION: Public Guardian
FLSA STATUS: Non-exempt
UNION AFFILIATION: YCEA

ESTABLISHED: April 2010

JOB SUMMARY:

This flexibly staffed class investigates the medical, psychological, financial and social backgrounds of individuals referred for conservatorship to determine and recommend to the court regarding appropriateness of conservatorship; plans and monitors the personal and financial affairs of such persons; arranges for delivery of community support services for elderly, mentally impaired or physically disabled clients; assesses risk and provides case management for conservatees to assure their safety in the least restrictive environment; and performs other duties as assigned.

Deputy Public Guardian I:

Under close direction incumbents learn to perform a variety of conservatorship specific duties related to case management and service provision and perform other duties as assigned. An incumbent of this classification possesses basic case management or investigative skills and learns to apply those skills to the Public Guardian/Conservator function. This is the entry Professional level in the Deputy Public Guardian series.

Deputy Public Guardian II:

Under direction incumbents are competent to independently perform a wide-range of conservatorship case management and service provision. This is the journey Professional level in the Deputy Public Guardian series.

CLASS CHARACTERISTICS:

This position reports directly to the Public Guardian-Conservator. This class is distinguished from the Public Guardian-Conservator in that the latter is a department head management classification with overall responsibility for the Public Guardian Department in its entirety of functions, including budget administration, policy development and implementation.

EXAMPLES OF DUTIES:

Essential:

- Analyzes compiled information to determine whether the person is disabled or substantially unable to provide for their own personal care, shelter and financial needs; investigates and assesses the financial, medical, psychological, vocational and social background of persons placed under the jurisdiction of the Public Guardian; explains conservatorship to proposed conservatees and wards, their families, and other involved persons or agencies, including legal representatives, physicians, health care providers and mental health professionals.
- Develops comprehensive care plans for the conservatees which address the conservatees' assessed needs and level of functioning, reviewing such plans on an on-going basis and modifying as appropriate.
- Petitions for appointment, annual reappointment and termination of Lanterman-Petris-Short (LPS) conservatorships and Probate Code Petitions based on declarations of mental health professionals; causes preparation of and reviews court pleadings, inventory and appraisal, periodic and final accountings, court confirmation of sales, and petitions for special instructions; interprets and applies the Welfare and Institution and Probate Codes.
- Prepares reports and recommendations regarding establishment of conservatorship or guardianship, including the powers and duties of proposed conservator, or any suitable alternatives.
- Researches records for pertinent clinical history, diagnosis and prognosis; consults with physicians, community social services or health care services to arrange for placement of conservatees in the most appropriate and least restrictive facility; authorizes treatment and personally coordinates the placement of conservatees in care facilities; visits board and care facilities to evaluate their ongoing suitability as a residence for conservatees; and arranges for transportation to court hearings when required.
- Serves as clients' rights advocate; works with community health, social services and other

agencies to arrange for a delivery of services to clients; applies for all public and private financial benefits and assistance to which conservatees are eligible, such as Social Security, Veteran's and retirement benefits or social services program assistance.

- Locates, inventories and directs the marshalling of all assets, including Social Security benefits, Veterans' benefits, other income, and personal and real property; oversees appraisal of estate, including maintaining records of assets and debits for the estate; and protects the estate against loss and/or waste; collects debts due to conservatees; reviews claims against conservatee's assets; 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 provides for payment of expenses from assets and other sources of assistance.
- Works cooperatively with Sutter-Yuba Mental Health, Yuba County Health and Human Services Department and other community-based organizations to arrange for the delivery of services to clients.
- Collaborates with Adult Protective Services and the Sheriff's Department in preparing and invoking a Certificate of Authority to Take Possession or Control of Property (Probate Code Section 2900-2903) for the purpose of protecting the assets of an elder or dependent adult domiciled in Yuba County from loss, injury, waste, or misappropriation by another party.
- Analyzes and makes recommendations to management concerning procedural changes such as for new or revised work related policies, procedures, and standards; serves on policy, technical, personnel, and customer group committees.
- Prepares and maintains comprehensive, accurate and timely case reports, records, and correspondence, including petitions, court reports and chronological activity records.
- Makes home visits in connection with casework assignments.
- May provide input into selection, evaluation, disciplinary and other personnel matters.
- Provides technical guidance to staff, particularly in difficult or non-routine situations.

Important:

- Comply with all County equipment and safety policies and procedures, and California Occupational Safety and Health Administration (CalOSHA) rules and regulations.
- Use standard office equipment, including a computer, in the course of the work.
- May drive a County or personal motor vehicle to attend court sessions and meetings, interview persons and visit case sites; may be designated to represent the County as the Public Guardian in meetings with other county or community agencies where assigned program is at issue.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, policies, and procedures used in conducting comprehensive assessments of mentally and functionally disabled persons, the elderly and their families.
- Principles, policies and procedures used in developing care plans for mentally and functionally disabled persons and the elderly.
- State and federal laws pertaining to guardianship, conservatorship, probate administration, and case management (e.g. Welfare and Institutions Code, Lanterman-Petris-Short Act, Probate Code and other laws and regulations as they relate to Public Guardian and Conservatorship).
- County and department policies and procedures.
- Legal definitions and forms used in conservatorship and probate proceedings; legal procedures and practices; functions of the court system and courtroom procedures.
- Principles and practices of legal, ethical and professional rules of conduct.
- Nature and range of social services related to public conservatorship law; various public welfare programs and community resources available to conservatees (i.e. community health, behavioral health, social services and legal support systems); regulations governing Federal Assistance, Social Security benefits, Veterans' Administration benefits, and other entitlements.
- Principles and techniques used in estate and financial investigation to determine conservatees' or wards' assets, including real and personal property, stocks, bonds and bank deposits.
- Concepts involved in wills, trusts, insurance policies, deeds and contracts.
- Techniques for interviewing and gathering information from a varied population.
- Principles and techniques of client assessment, investigation, intervention and case management.
- Laws and procedures governing location, marshalling and disposition of assets and property.
- Methods and practices of financial record keeping.

- Social and psychological problems of the elderly, emotionally disturbed, mentally ill, and severely physically disabled persons, and community resources available to assist this conservatee base.
- Techniques for working successfully with other employees in a lead capacity.
- Principles and practices of technical and functional supervision and training.

Skill in:

Deputy Public Guardian I:

- Gathering, assembling, analyzing and evaluating social, medical and legal information.
- Understanding, interpreting, applying and keeping up to date on laws and regulations.
- Assessing prioritizing multiple tasks, projects and demands.
- Planning and monitoring household budgets.
- Locating and arranging delivery of community health and welfare services.
- Analyzing reports and other written data.
- Analyzing problems, identifying solutions, recommending and implementing methods, procedures and techniques for resolution of issues.
- Gathering, assembling, analyzing and evaluating facts and evidence to draw conclusions and make good decisions.
- Establishing and maintaining systematic records including business, tax and inventory records.
- Developing, documenting and implementing comprehensive case plans.
- Communicating clearly and concisely verbally and in writing.
- Establishing and maintaining effective working relations with co-workers, other County employees and representatives from other county, state and federal agencies.
- Planning, directing and reviewing the work of others on a project or day-to-day basis.
- Train support staff in policies and procedures related to the work.

Deputy Public Guardian II (in addition to the above):

- Working independently, exercising good judgment and honesty.

Ability to:

- Give full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate and not interrupting at inappropriate times.
- Organize and present factual information in verbal and written form.
- Communicate competently and effectively in writing and verbally as appropriate for the needs of the audience.
- Define alternatives and make appropriate recommendations.
- Establish rapport and gain the trust of clients.
- Deal effectively with persons of varying cultural and social backgrounds as well as those exhibiting symptoms of mental disorder, senility and/or incompetence.
- Deal courteously, effectively and persuasively with the public, medical, legal and other professionals.
- Utilize various computer software programs relevant to the position.
- Develop skill in interviewing, case recording, and interpretation and combine pieces of information to form general rules or conclusions in developing clients' service plans.
- Perform calmly, purposefully and appropriately in emergency and stressful situations.
- Maintain composure, keep emotions in check, control anger, and avoid aggressive behavior, even in very difficult situations.
- Deal effectively with manipulative, hostile or antisocial behavior.
- Accept criticism and deal calmly and effectively with high stress situations.

Physical Demands: The physical demands and work environment described here are representative of those that must be met by an employee to successfully perform the essential function of the job, with or without accommodation. Prospective employees must complete a pre-employment medical exam (Occupational Group III) which will measure the ability to:

- See well enough to read fine print and view a computer screen; speak and hear well enough to understand, respond, and communicate clearly in person and on the telephone; independent body mobility sufficient to stand, sit, walk, stoop, squat, twist, and bend to access the work environment and a standard office environment; manual dexterity and sufficient use of hands, arms and shoulders to repetitively operate a keyboard and to write; and the ability to sit or walk for prolonged periods of time.

- Frequently use a computer keyboard and mouse; regularly twist, bend and reach a variety of office equipment; intermittently walk, stand, stoop, lift or carry items weighing up to 40 lbs.
- Regularly drive a motor vehicle to attend meetings, court proceedings and visit clients; ability to maneuver a wheelchair for clients.

Accommodation may be made for some of these physical demands for otherwise qualified individuals who require and request such accommodation.

Work Environment:

- Work closely with others or alone, inside and outside of buildings, in the heat or in the cold.
- Potential exposure to contagious or infectious diseases or hazardous substances and chemicals.
- Work with hostile or abusive persons.

QUALIFICATIONS:

The minimum and preferred requirements are listed below. While the following requirements outline the minimum qualifications the County reserves the right to select applicants for further consideration who demonstrate the best qualifications match for the job. Meeting the minimum qualifications does not guarantee further participation in selection procedures:

Licenses and Certification:

- The ability to obtain a valid California Class C driver's license within ten (10) days of employment.
- Must obtain certification issued by the California State Association of Public Administrators, Public Guardians and Public Conservators within four (4) years of appointment under the standards and certification requirements set forth by the PAPGPC and maintain certification while employed in the Public Guardian/Conservator Office or subject to dismissal; must provide proof of re-certification within 10 calendar days prior to expiration.

Special Requirements:

- Must successfully complete an extensive and thorough background investigation which includes Live Scan fingerprinting required prior to hire.
- DMV printout required prior to hire.
- Attend meetings outside of normal working hours.
- Respond to emergency situations during weekends, holidays and other off-hours shifts.
- Must complete periodic continuing education coursework as required to maintain active certification.

Education and Experience:

DEPUTY PUBLIC GUARDIAN I:

MINIMUM: Bachelor's degree from an accredited institution in a related field, including but not limited to Behavioral Science, Business Administration, Psychology, Sociology or Social Work, and at least three years of progressively responsible professional social casework and/or case management experience at a level at least equivalent to the County's class series of Social Worker I or Case Manager I/II.

Candidates with strong experience who lack the knowledge and can demonstrate they possess the required knowledge, skills and abilities are encouraged to apply.

PREFERRED: In addition to the minimum, a Bachelor's degree in Social Work from an accredited institution, advanced degree in a field related to social work and additional years of progressively responsible professional social casework experience as previously defined.

DEPUTY PUBLIC GUARDIAN II:

MINIMUM: In addition to the Deputy Public Guardian I minimum requirements, at least two years of direct experience at the County's class of Deputy Public Guardian I.

PREFERRED: In addition to the minimum, a Bachelor's degree in Social Work from an accredited institution, advanced degree in a field related to social work and additional years of progressively responsible professional social casework experience as previously defined.

This class specification lists the major duties and requirements of the job. Incumbent may be expected to perform job-related duties other than those contained in this document.

Dept Approval: Asha Davis

Date:

Signature: _____

Personnel Approval: Iva Seaberg

Date:

Signature: _____