

CLASS SPECIFICATION



CLASS: Public Guardian/Conservator
ALLOCATION: Public Guardian
FLSA STATUS: Exempt
UNION AFFILIATION: Non-Represented

ESTABLISHED: Prior 1985
REVISED: February 2021

JOB SUMMARY:

This management classification administers all departmental administrative and budgetary functions; oversees the protection, preservation and management of estate assets, surrogate decision making for medical, surgical, psychiatric and other health/personal care and arrangements for the provision of food, clothing, shelter and other needs for court-assigned clients; and performs related work as assigned.

This is the executive level classification in the Public Guardian series.

CLASS CHARACTERISTICS:

This is an at-will position appointed by the Board of Supervisor and reporting directly to the County Administrator. This class is distinguished from the County Administrator in that the latter is responsible for county-wide policy guidance, program development and evaluation, and the provision and coordination of all County Services in accordance with the adopted goals and objectives of the Board of Supervisors.

EXAMPLES OF DUTIES:

Essential:

- Represents the County of Yuba in Superior Court as the Public Guardian; testifies in court as required; provides assistance to the Public Administrator and County Counsel in filing appropriate documents with Superior Court in the initiation, management and completion of conservatorships and decedent estates.
- Develops, directs, plans, and implements goals, objectives, policies, procedures, and work standards for the department; develops and implements policy and procedural changes as required; drafts changes to County ordinances, regulations and procedures for approval.
- Directs and coordinates the department's financial and budgetary activities in order to fund operations, maximize investments, and increase efficiency; directs the preparation and administration of the department's budget for approval, including those for funding and implementation of programs.
- Analyzes operations to evaluate performance of the department and its staff in meeting objectives and to determine areas of potential cost reduction, program improvement, or policy changes; prioritizes and allocates available resources; reviews and evaluates program and service delivery; makes recommendations for improvements and ensures maximum effective service provisions.
- Confers with the County Administrator, members of the Board of Supervisors, County Counsel and staff members to discuss issues, coordinate activities, and resolve problems; represents the County to members of boards and commissions, various governmental agencies, contractors, business and industrial groups, as well as, to the public.
- Plans, assigns, reviews, and evaluates the activities of professional, technical, and office support staff directly or through subordinate managers; directs the selection of staff; provides training and professional development; interprets regulations and County policies and procedures to departmental employees; ensures effective morale, productivity and discipline of departmental employees.
- Petitions for appointment, annual reappointment and termination of Lanterman-Petris-Short (LPS) conservatorships based on declarations from mental health professionals; Petitions for appointment and termination of Probate Conservatorships. Prepares and reviews court pleadings, completes inventory and appraisals, processes periodic and final accountings, seeks court confirmation for sales, petition for special instruction from court when needed; interprets and applies Welfare and Institution and Probate Codes.
- 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.
- 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 conservatees' 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.

- 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; coordinate with stakeholders regarding the services and care as it relates to conservatees.
- 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.
- 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.

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.
- 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:

- Business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.
- Principles and practices of employee supervision, including selection, work planning and organization, performance review and evaluation and employee training and discipline.
- Principles and practices of public guardian case management, social work and social service provision, including locally-available community resources.
- 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).
- Principle and practices of estate property accounting, records and money management.
- Crisis intervention and basic counseling techniques.
- Applicable laws, codes and regulations.
- Administrative principles and practices, including goal setting, program development, implementation and evaluation, and the supervision of staff.
- Computer applications related to the work.
- Records management principles and practices.
- Techniques for dealing with a variety of individuals from various socio-economic, ethnic and cultural backgrounds, often in situations which may be stressful.

Skill in:

- Project Management.
- Motivating, developing, and directing people as they work, identifying the best people for the job.
- Leadership, scheduling and supervising staff, skills training, and delegating tasks and authority.
- Identifying the developmental needs of others and coaching, mentoring, or otherwise helping others to improve their knowledge or skills.
- Monitoring and assessing the performance of one's self, other individuals, or processes to make improvements or take corrective action.
- Planning, assigning, organizing, supervising, reviewing and evaluating the work of staff.
- Training staff in policies and procedures related to the work.
- Developing and implementing goals, objectives, policies, procedures and work standards.
- Interpreting, applying and explaining laws and regulations relating to guardianship and conservatorship functions.

- Making accurate arithmetic calculations.
- Preparing clear and concise reports, correspondence and other written materials.
- Using initiative and independent judgment within general policy guidelines.
- Organizing own work and the work of subordinates, managing multiple projects and meeting critical deadlines.
- Dealing successfully with a variety of individuals from various socioeconomic, ethnic and cultural backgrounds.
- Maintaining accurate records and files.
- Using tact, discretion and prudence in dealing with those contacted in the course of the work.

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.
- Instill individual accountability and responsibility by immediately responding to behavior.
- Communicate competently and effectively in writing and verbally as appropriate for the needs of the audience.
- Organize and present factual information in verbal and written form.
- Establish and maintain client rapport on an individual basis.
- 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.
- Interpret and explain to the applicant, recipient, or others public social service programs, policies, rules and regulations.
- Come up with unusual or clever ideas about a given topic or situation, or develop creative ways to solve a problem.
- 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 is performed in office, outdoor, driving and courtroom environments.
- 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 be 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 and credit check 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.
- Ability to be bonded.
- Must file statements of economic interest with the Yuba County Clerk/Recorder.

Education and Experience:

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 experience involving independent responsibility and public contact in one or more of the following areas: probate of estates, estate management, paralegal services, conservatorship administration, management of public outreach or social services staff.

Candidates with strong experience who lack the degree are encouraged to apply.

PREFERRED: In addition to the minimum, at least two years of professional experience equivalent to the County's class of Deputy Public Guardian II and management/supervisory experience in a public agency.

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.

CAO Approval:
Date:

Signature: _____

HR Approval:
Date:

Signature: _____

EEOC: A
WC: 9410

Established: Prior to 1985
Revised: May 1996; July 2002; March 2010; July 2016