



COUNTY OF LASSEN
JOB DESCRIPTION

CLASS TITLE:	Deputy Public Conservator/Guardian/Administrator	CLASS CODE	HH11
DEPARTMENT:	Health and Social Services Agency	UNIT	LCGU
REPORTS TO:	Public Conservator/Guardian/Administrator	FLSA STATUS	Non Exempt
BOARD APPROVAL	Shannon 1999/rev 10/03/Reviewed 12/04, Revised 11/27/12, Revised 12/13/2016	RANGE	17

JOB SUMMARY

Under direction of the Public Conservator/Guardian/Administrator, conducts investigations, provides recommendations, and manages conservatorships, guardianships, administrator, and representative payee cases.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Department Head.

Exercises functional supervision over assigned clerical staff.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. (All duties may not be performed by all incumbents.) Other duties may be assigned.

Perform other duties as assigned.

- Conducts investigations in proposed conservatee and public administration cases; prepares related reports and other documents.
- Assess/evaluate medical, psychological, financial, and social backgrounds of individuals referred for conservatorship.
- Prepares court documents; attend court hearings; provide court testimony as needed.
- Visits clients and placement facilities on a regular or as-needed basis.
- Provides for the care, treatment, and supervision of conservatees; acts as an advocate in all matters pertaining to conservatees; makes referrals to other social service agencies as appropriate; makes appointments with physicians and other professional as needed.
- Make medical and end-of-life decisions for conservatee.
- Provides both short and long term case management services and activities.
- Manages conservatee and representative payee client income, benefits, and other assets to provide for current and future needs of the conservatee and representative payee client.
- Develops budgets, track income, disbursements, investments, and other information to provide accurate accountings as required by the various types of cases handled by the department.
- Marshalls the assets of conservatees and in public administration cases; deposits monies received on behalf of estates and others in accounts authorized by State law controlling the authority of Public Guardians and Administrators; disburses and closes estates; opens burial trusts and makes funeral arrangements.
- Inventories, cleans, secures, and disposes of client property as appropriate.



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- Attends workshops and training sessions, local and out-of-county, as appropriate or required to enhance job knowledge and skills.
- Performs general office work as necessary, including answering the telephone, typing reports and correspondence, enter data into the computer, copying and filing documents, etc.
- Provides support to co-workers as needed and participate in team decision making processes as appropriate.
- Performs other duties as assigned.

MINIMUM QUALIFICATIONS REQUIRED

Education and Experience

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible experience providing accounting/property management services and/or crisis social services; or experience in interpreting processing and maintaining complex legal documents dealing with property transfer.

Education:

AA degree or equivalent experience based on one year of experience working in Adult Services or Public Guardian for one year of college.

Licenses and Certifications

Possession of a valid California Class C driver's license.

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of:

Principles and practices of public guardianship and conservatorship.

Pertinent local, state, and Federal laws, rules and regulations.

Interviewing and record keeping techniques.

Court procedures and techniques relating to public guardianship/conservatorship

Pertinent department rules and procedures.

Principles, practices and methods used in estate and financial conservatorship investment and disbursement.

Welfare and Institutions Code, Probate Code and other applicable laws and regulations relating to estate management and disposal.

Methods and terminology related to the appraisal of real and personal property.

Practices related to the real property title recording and transfer.

Techniques for locating next of kin and other heirs.



Ability to:

- Learn the functions and responsibilities of the Public Guardian/Conservator/Administrator department.
- Learn, interpret and apply the rules, regulations, laws, and procedures applicable to the department's functions.
- Interview people, assess situations, and identify needs to make appropriate recommendations and referrals.
- Learn to review and analyze a variety of court documents, fiscal reports, investigations, and accounting information.
- Prepare clear, concise, complete and accurate records and reports.
- Effectively represent the department in contacts with clients, service providers, the public, community organizations, and other government agencies.
- Understand and follow oral and written instruction.
- Establish and maintain effective working relationships with contacts in the course of work.
- Work cooperatively with other employees.
- To travel out-of-county for trainings or to visit clients. Travel may require one or more overnight stay.

Physical Demands

- Must possess ability to work in a standard office setting and use standard office equipment, including a computer; ability to operate a standard motor vehicle; ability to physically assist clients who have compromised mobility or mental status as appropriate; vision to read written material and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This job also requires field investigations of clients and/or their property. Must possess the ability to bend, stoop, kneel, and reach as well the ability to carry, push, and pull materials and objects, up to 30 pounds, as necessary to perform job functions.

Working Conditions

- Employees work both in an office environment and in the field. The office environment has moderate noise levels and controlled temperature conditions. In the field employees may be exposed to illness/disease, malodorous conditions, cold or hot temperatures, inclement weather conditions, road hazards, confining work space, and terrain, chemical, mechanical, and/or electrical hazards. In the office and in the field, employees may interact with upset staff and/or public and private representatives when interpreting and enforcing departmental policies and procedures.

Additional Info

- Government agencies accessing US government information, which include federal tax information must ensure that background investigation requirements for all agency employees and contractors that have access to federal tax information are consistent to the IRS background investigation requirements for access to federal tax information.



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Background requirements consist of three components which include, fingerprinting, citizenship verification and law enforcement checks. State agencies must conduct investigation during time of hire and ensure a reinvestigation is conducted 10 years from the date of the previous investigation for each employee that has access to federal tax information.