COUNTY OF SOLANO

DEPUTY PUBLIC ADMINISTRATOR /PUBLIC GUARDIAN/ PUBLIC CONSERVATOR

Rev. 08/07

DEFINITION

Under direction, depending on assignment performs social and fiscal case management for clients under probate and Lanterman-Petris-Short (L.P.S.) conservatorships; investigates, collects, inventories, and disposes of estate assets and assists in administering the business affairs of estates in probate.

CLASS CHARACTERISTICS

Depending on assignment, incumbents in this class perform case management, estate management, technical paralegal duties and related duties as assigned involving conservatorship and/or decedent estates placed under the jurisdiction of the Public Administrator/Public Guardian/Public Conservators Office. Assignments may vary in any of the three areas: Public Administrator, Public Guardian, Public Conservator. The incumbent follows general guidelines and procedures, applies provisions of applicable laws in providing client and estate management services.

EXAMPLES OF DUTIES

Duties may include but are not limited to the following:

1. Collects and protects assets; locates, secures, and inventories all real and personal property of conservatee; develops financial plan for daily and monthly maintenance needs of conservatee; authorizes payment of bills; fixes the residence of clients to ensure placement in the least restrictive environment; ensures provision of food, clothing and personal needs

2. Ensures proper medical and psychological care for clients, including requesting evaluations, participating in development of treatment plans, monitoring provision of services, petitioning for or authorizing invasive procedures, and initiating, evaluating, and coordinating the need for life support, preparation of advance directives, appropriateness of withdrawing life support, evaluating and presenting client wishes

3. Secures funding, facilitates and coordinates obtaining various benefits for clients, and prepares benefit pre-determination to ensure current eligibility to those benefits.

4. Serves as fiduciary and administers living and decedent client estates and ongoing finances, including locating, inventorying, appraising, marshaling, protecting, conserving and managing assets; searches for and locate wills, heirs, and relatives; contacts banks, stock brokers, insurance companies and other organizations to verify assets and initiate various probate procedures; conducts preliminary title searches; recommends, requests, and reviews payment of fees; pays estate debts and makes disbursements to heirs; prepares and authorizes liquidation plans

5. Concerning estate administration; interviews and advises heirs; attempts to resolve estate administration conflicts to the satisfaction of heirs where possible and to the Courts as required

6. Prepares case documentation, correspondence and reports; prepares legal forms and related paperwork as necessary; maintains case logs and activity updates; assures safekeeping of case records and files

7. Arranges for disposition of final remains.

8. Stays abreast of current probate legislation; attends meetings and/or training sessions as required; may attend conferences and/or seminars.

QUALIFICATION GUIDELINES

Education and/or Experience

Progressively responsible experience which demonstrates possession of and competency in requisite knowledge skills and abilities. Typical qualifying experience would be:

1. Graduation from an accredited four-year college or university with a Bachelors Degree in Business Administration, Public Administration, Social Welfare, Psychology or a related field, AND
   One year of recent work experience in probate of estates, legal guardianship, conservatorship, estate management, or social work.

OR

2. An Associate Degree in Business Administration, Public Administration, Social Welfare, Psychology or a related field, AND
   Three years of recent work experience in probate of estates, legal guardianship, conservatorship, estate management, or social work.

OR

3. A total of thirty (30) semester or forty five (45) quarter units from an accredited college with major course work in Business Administration, Public Administration, Social Welfare, Psychology or other related course work, AND
   Five years of recent work experience in probate of estates, legal guardianship, conservatorship, estate management, or social work.

Special Requirements

Possession of a valid Class C driver's license is required.

Ability to be bonded.

Completion of California Association of Public Administrators /Public Guardians /Public Conservators certification is highly desirable.

Candidates may be required to pass a background investigation in accordance with applicable law, regulation and/or policy.Knowledge/Abilities

Working knowledge of the appropriate provisions of the California Probate Code, Welfare and Institutions Code, and other pertinent laws and regulations as they relate to Public Administrator and Public Guardian and Conservator; legal definitions and forms used in conservatorship and probate proceedings; various public benefit programs and community resources available to conservatees; principles, practices and methods used in estate and financial investigations; title searching, real property recording, real and personal property sales, transfers, appraisal methods and terminology; concept involved in wills, trusts, insurance policies, deeds and contracts; legal procedures and practices; courtroom procedures and the methods and techniques of interviewing, research and recordkeeping; the special needs of disabled adults, mentally ill, and frail elderly populations; medical and psychiatric terminology and current treatment methods.

Ability to assist in investigations of assigned cases; gather financial information, locate heirs, real property and other assets; develop and maintain confidence and cooperative relationships with the public, coworkers, clients, relatives and friends of clients, and employees of agencies involved with assigned caseload; communicate tactfully and effectively with persons under emotional stress; deal effectively with clients who are difficult, unstable, mentally ill, potentially abusive or violent; gather, assemble, analyze and evaluate facts and evidence and to draw conclusions and make good decisions; prepare correspondence and reports on various subjects in a clear and concise manner; prepare and monitor budgets; negotiate, draft, implement and interpret contracts; draft and implement clear and concise division policies, procedures, and operating manuals; answer procedural, factual and technical questions related to estate administration and conservatorship services; use modern office equipment and computers sufficient for satisfactory work performance.

SUPPLEMENTAL INFORMATION

Independent travel is required.

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Donald W. Turko
Director of Human Resources

Established Date: March 2002
Revised Date: August 2007

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