

**COUNTY OF SOLANO**  
**DEPUTY PUBLIC GUARDIAN**

**DEFINITION**

Under direction, performs social and fiscal case management for clients under probate and Lanterman-Petris-Short (L.P.S.) conservatorships; performs related work as required.

**CLASS CHARACTERISTICS**

Positions in this class serve as the court appointed conservator for persons under the jurisdiction of the Public Guardian. Incumbents follow general guidelines and procedures and apply provisions of applicable laws in providing client and estate management services. This class is distinguished from Public Guardian by the latter's responsibility to plan, organize and direct overall department activities.

**EXAMPLES OF DUTIES**

Depending on assignment, duties may include but are not limited to the following:

1. Arranges and/or provides for physical support for clients such as housing, clothing and transportation; arranges for payment of expenses deemed necessary for adequate living arrangements; identifies problems of conservatee and provides for needed social services; provides counseling on issues of money management and general living skills; evaluates reported or suspected problem with conservatees; assists in locating and returning conservatees to care facilities; recommends and initiates detention and hospitalization of conservatees when deemed necessary; participates in case conferences with mental health professionals; reviews each case and determines need for continuation of conservatorship and submits necessary documents for renewal.
2. Gathers 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.
3. Makes arrangements for purchase or disposal of conservatee's personal and real property; applies for social security, medicare, private or government pensions, etc.
4. Ensures that conservatee has adequate food, housing, clothing and medical care.

**QUALIFICATION GUIDELINES**

**Education and/or Experience**

Some experience in estate management, estate investigation work or providing case worker services to incompetent, disabled or needy persons which demonstrates possession of and competency in the requisite knowledge and abilities.

**Knowledge/Abilities**

Considerable 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 Guardian and conservatorship cases; public Welfare programs and community resources available to conservatees.

Working knowledge of the principles, practices and methods used in estate and financial investigations; concepts involved in wills, insurance policies, deeds and contracts; legal terminology sufficient to read, understand and interpret legal documents; emotional and psychological problems peculiar to elderly, emotionally disturbed and mentally ill persons as well as the severely physically disabled; knowledge of title searching, real property recording, real estate transfers and appraisal methods and terminology.

Ability to manage the assets of conservatees including financial management, the paying of taxes, maintenance of real property and the safe keeping of personal effects; gather information on financial resources, real property and other assets; develop and maintain the confidence and cooperation of individuals involved in conservatorship proceedings; gather, assemble, analyze and evaluate facts and evidence to draw logical conclusions and make sound recommendations; ability to understand, interpret and apply complex laws and regulations; prepare and maintain clear, concise and comprehensive records and reports; evaluate and cope with difficult interpersonal situations; make referrals to providers of social, medical and other services; collaborate with mental health professionals; prepare concise reports; determine the appropriate course of action in emergency or stressful situations; understand program objectives in relation to departmental goals and procedures; recognize and respect limits of authority and responsibility; project consequences of decisions; communicate effectively both verbally and in writing; establish and maintain cooperative working relationships; maintain confidentiality of information.

**Special Requirements**

Ability to be bonded.

Possession of or ability to obtain a valid Class III California driver's license is required.

**SUPPLEMENTAL INFORMATION**

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