

**SUBMITTAL TO THE BOARD OF SUPERVISORS  
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**

151



**FROM:** Human Resources

**SUBMITTAL DATE:**  
June 11, 2007

**SUBJECT:** Approval of Classification Study Recommendations for the Mental Health Department's Public Guardian's Office, the Transportation Department; and amend Ordinance 440 pursuant to Res. No 440-8729 submitted herein.

**RECOMMENDED MOTION:** That the Board approve the recommendations in the attached Resolution 440-8729.

**BACKGROUND:** The Conservatorship Investigations Office (CIO) of the Mental Health Department's Public Guardian's Office evaluates and investigates probate and Lanterman-Petris-Short (LPS) conservator referrals to determine the need and eligibility for public conservatorship for individuals who may be gravely disabled or legally incompetent. To more accurately describe the level of difficulty and responsibility as well as nature of the duties performed by the incumbents, the Department has requested that a class of Public Guardian Investigator be established.

Continued on page 2

Ronald W. Komers  
Asst. County Executive Officer/Human Resources

|                       |                               |   |                         |         |
|-----------------------|-------------------------------|---|-------------------------|---------|
| <b>FINANCIAL DATA</b> | Current F.Y. Total Cost:      | 0 | In Current Year Budget: | N/A     |
|                       | Current F.Y. Net County Cost: | 0 | Budget Adjustment:      | N/A     |
|                       | Annual Net County Cost:       | 0 | For Fiscal Year:        | 2006/07 |

|                         |                                  |                          |
|-------------------------|----------------------------------|--------------------------|
| <b>SOURCE OF FUNDS:</b> | Positions To Be Deleted Per A-30 | <input type="checkbox"/> |
|                         | Requires 4/5 Vote                | <input type="checkbox"/> |

**C.E.O. RECOMMENDATION:**

APPROVE

BY: Steve P. Schubert

County Executive Office Signature

- Consent
- Policy
- Consent
- Policy

Dept Recomm.:

Per Exec. Ofc.:

Prev. Agn. Ref.:

District:

Agenda Number:

3.13

**BACKGROUND continued**

The Transportation Department requests a parity adjustment for the Senior Surveyor classification. This will both restore the historic parity relationship with Associate Engineer and the 5.5% salary relationship between Senior Surveyor and the licensed Senior Land Surveyor level that existed prior to May 13, 2004.

**CLASSIFICATION ADDITION: Mental Health**

**Public Guardian Investigator:** It is recommended that a new classification of Public Guardian Investigator be established with the proposed salary plan/grade UPE 479 L11 (\$36,783 - \$47,921). Labor market salary data was not available; therefore, internal class relationships were used as the basis for the proposed salary plan/grade. Since this request is only to add the class to the Class and Salary Listing, there is no cost impact at this time. The class specification is attached.

**PARITY ADJUSTMENTS**

**Senior Surveyor:** It is recommended that this job class be granted a parity adjustment of approximately 11.2% from salary plan/grade SEU 616 L11 (\$57,660 – 75,216) to salary plan/grade SEU 670 L11 (\$64,119 – 83,651). Since there are no incumbents in the Senior Surveyor class, there will be no cost impact resulting from this recommended action.

1 RESOLUTION NO. 440-8729

2  
3 BE IT RESOLVED by the Board of Supervisors of the County of Riverside, State of California, in  
4 regular session assembled on June 19, \_\_\_\_\_, 2007, that pursuant to Section 4.C. of  
5 Ordinance No. 440, the Assistant County Executive Officer/Human Resources Director is authorized to  
6 amend the Class and Salary Listing of Ordinance No. 440, operative the beginning of the pay period  
7 following approval, as follows:

| <u>Job Code</u> | <u>+/-</u> | <u>Class Title</u>           | <u>Salary Plan/Grade</u> |
|-----------------|------------|------------------------------|--------------------------|
| 37522           | +          | Public Guardian Investigator | UPE 479                  |

10  
11  
12  
13  
14 BE IT FURTHER RESOLVED that pursuant to Section 8.C. of Ordinance No. 440, the Assistant County  
15 Executive Officer/Human Resources Director is authorized to amend the Class and Salary Listing of  
16 Ordinance No. 440, operative at the beginning of the pay period following the date of approval, as  
17 follows:

| <u>Job Code</u> | <u>Class Title</u> | <u>From Salary Plan/Grade</u> | <u>To Salary Plan/Grade</u> |
|-----------------|--------------------|-------------------------------|-----------------------------|
| 76483           | Senior Surveyor    | SEU 616                       | SEU 670                     |



COUNTY OF RIVERSIDE  
Established Date: May 16, 2007

## **PUBLIC GUARDIAN INVESTIGATOR**

Class Code:  
37522

### **SALARY RANGE**

\$17.68 - \$23.04 Hourly \$3,065.28 - \$3,993.39 Monthly \$36,783.34 - \$47,920.70 Annually

### **CLASS CONCEPT:**

Under general supervision, to evaluate and investigate referrals to the Public Guardian Office to determine the individual's need and eligibility for conservatorship; to evaluate the level of risk of individuals who may be gravely disabled or legally incompetent; to prepare reports recommending conservatorship or a viable alternative; and to do other work as required.

The Public Guardian Investigator investigates and evaluates individual's need and determines eligibility for and if public conservatorship is in the best interests of that individual. This class is allocated only to the Department of Mental Health's Public Guardian's Office. The Public Guardian Investigator class is distinguished from the Deputy Public Guardian in that the latter classification manages the personal and financial affairs of persons who have been placed under guardianship by the court and are responsible for protecting conservatees and their respective estates from exploitation and loss. The Public Guardian Investigator is responsible for investigating referrals and preparing recommendations for conservatorship for County Counsel's review.

### **REPRESENTATION UNIT:**

Inspections & Technical

### **EXAMPLES OF ESSENTIAL DUTIES:**

(Depending on the area of assignment, duties may include, but are not limited to, the following)

- Receives and reviews referrals to evaluate and assess the level of risk of individuals who may be gravely disabled or legally incompetent.
- Investigates allegations of abuse, self-neglect, financial loss, or medical or health concerns by making home or facility visits and interviewing the referred individual to collect and verify information; identifies and locates, individual's family, physicians, and others by searching through directories, utility records and other available resources as well as through inquiries of public or private agencies; interviews the potential client's family, neighbors, friends, landlords, physicians, and others to assess that individual's functional capacity, physical and environmental conditions.
- Contacts banks, investment agencies, mortgage and title companies and other agencies to obtain information regarding the potential conservatee's financial assets; collects, reviews, and analyzes legal documents including wills, trusts, Power of Attorney to assess the potential conservatee's need for conservatorship or a viable alternative.
- Interprets department policies and conservatorship procedures to the potential conservatee's family and others as required.
- Consults with doctors, psychologists, other medical providers, and professionals from other department and agencies to determine if the potential client's need for medical and medical health services or to assist in facilitating temporary placement of clients; makes arrangements for referrals for immediate medical or mental health treatment and temporary placement.

- Interviews perpetrators of physical or sexual abuse or financial exploitation of potential conservatees; meets with representatives from Adult Protective Services, law enforcement and the District Attorneys office to report investigation findings in cases involving abuse; may testify in Court regarding the facts and findings of investigation.
- Determines if public conservatorship is in the best interest of the potential client, based on that individual's life skills, cognitive abilities, limitations, mental, physical and environmental conditions; recommends public conservatorship or alternatives including persuading relatives to assume conservatorship or guardianship responsibility.
- Maintains case records of investigation findings and prepares and submits a detailed report to County Counsel recommending conservatorship; meets with assigned Deputy Pubic Guardian to review investigation findings and turns over the case file after the client has been placed under guardianship by the court.
- Investigates Orders to Show Cause from Superior Court why the Public Guardian should not be appointed over a case that has a private conservator; reviews the Court file and interviews the client, conservator and attorney to assess the situation; prepares a detailed report including substantiating evidence supporting the reason why the Public Guardian should not be appointed and recommends a viable alternative to the Court.
- Provides In-Service Training to educate hospitals, Care Agencies, law enforcement, APS induction of new employees and other agencies as needed regarding conservatorship requirements.

**RECRUITING GUIDELINES:**

**OPTION I**

Education: Completion of 30 semester or 45 quarter units in law, real estate, finance, accounting, public or business administration social services, human services of closely related field.

AND

Experience: Two years of experience as an Estate Investigator with the County of Riverside. (Additional qualifying experience may substitute for the required education on a year-for-year basis).

**OPTION II**

Education: Completion of 30 semester or 45 quarter units in law, real estate, finance, accounting, public or business administration social services, human services of closely related field. (Additional qualifying experience may substitute for the required education on a year-for-year basis).

AND

Experience: Three years of experience in which the primary duties of the job involved in-depth interviewing and the securing of information from individuals to determine, on the basis of laws and regulations, the proper case action or experience performing case management duties in a health or human services field.

Knowledge of: Basic Public Guardian/Conservator's functions and related laws; investigative procedures, interviewing and analytical techniques for gathering interpreting and evaluating data; language used in documents such as wills, deeds and contracts; various types and uses of documents representing assets and liabilities and techniques to determine assets and liabilities.

Ability to: Conduct effective interviews with individuals to obtain financial, personal and sensitive information pertaining to prospective clients; research, collect and review and verify the accuracy and

completeness of information; meet with and effectively communicate investigation findings with representatives from various departments and agencies to resolve issues and develop an effective course of action; make sound and effective decisions and determinations in the best interest of prospective clients; exercise tact, diplomacy, courtesy, and sensitivity when interacting with prospective clients and their family members who are under emotional stress, suffering from mental illnesses or who are uncooperative, inflexible, agitated, upset or hostile.

**OTHER REQUIREMENTS:**

License or Certificate: Possession of a valid California Driver's License.

Fingerprinting and/or background investigation will be required.

**PRE-EMPLOYMENT:**

All employment offers are contingent upon successful completion of both a pre-employment physical exam, including a drug/alcohol test, and a criminal background investigation, which involves fingerprinting. (A felony or misdemeanor conviction may disqualify the applicant from County employment).