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(3) If the court determines that there is sufficient evidence to justify the imposition on the alleged victim's civil liberties caused by the certification, the court may, in its discretion, do one or more of the following:

(A) Order disbursements from the alleged victim's assets, as are reasonably needed to address the alleged victim's needs.

(B) Appoint a temporary conservator of the alleged victim's estate, where the facts before the court would be sufficient for the appointment of a temporary conservator under Section 2250.

(C) Deny the petition.

(D) Award reasonable attorney's fees to the respondent's attorney from the victim's estate.

Cal. Prob. Code § 2954. Form of declaration

A declaration issued by a peace officer under this chapter shall not be valid unless it substantially complies with the following form: (please reference statute for full form).

Cal. Prob. Code § 1511: Notice of hearing

- (a) Except as provided in subdivisions (f) and (g), at least 15 days before the hearing on the petition for the appointment of a guardian, notice of the time and place of the hearing shall be given as provided in subdivisions (b), (c), (d), and (e) of this section. The notice shall be accompanied by a copy of the petition and shall include a copy of the form required by Section 68511.1 of the Government Code. The court shall not shorten the time for giving the notice of hearing under this section.
- (b) Notice shall be served in the manner provided in Section 415.10 or 415.30 of the Code of Civil Procedure, or in any manner authorized by the court, on all of the following persons:
- (1) The proposed ward if 12 years of age or older.
 - (2) Any person having legal custody of the proposed ward, or serving as guardian of the estate of the proposed ward.
 - (3) The parents of the proposed ward.

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- (4) Any person nominated as a guardian for the proposed ward under Section 1500 or 1501.
- (c) Notice shall be delivered pursuant to Section 1215 to the addresses stated in the petition, or in any manner authorized by the court, to all of the following:
 - (1) The spouse named in the petition.
 - (2) The relatives named in the petition, except that if the petition is for the appointment of a guardian of the estate only the court may dispense with the giving of notice to any one or more or all of the relatives.
 - (3) The person having the care of the proposed ward if other than the person having legal custody of the proposed ward.
 - (d) If notice is required by Section 1461 or 1542 to be given to the Director of State Hospitals or the Director of Developmental Services or the Director of Social Services, notice shall be delivered pursuant to Section 1215 as required.
 - (e) If the petition states that the proposed ward is receiving or is entitled to receive benefits from the Veterans Administration, notice shall be delivered pursuant to Section

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1215 to the office of the Veterans Administration referred to in Section 1461.5.

(f) Unless the court orders otherwise, notice shall not be given to any of the following:

(1) The parents or other relatives of a proposed ward who has been relinquished to a licensed adoption agency.

(2) The parents of a proposed ward who has been judicially declared free from their custody and control.

(g) Notice need not be given to any person if the court so orders upon a determination of either of the following:

(1) The person cannot with reasonable diligence be given the notice.

(2) The giving of the notice would be contrary to the interest of justice.

(h) Before the appointment of a guardian is made, proof shall be made to the court that each person entitled to notice under this section either:

(1) Has been given notice as required by this section.

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(2) Has not been given notice as required by this section because the person cannot with reasonable diligence be given the notice or because the giving of notice to that person would be contrary to the interest of justice.

(i) If notice is required by Section 1460.2 to be given to an Indian custodian or tribe, notice shall be mailed as required.

Cal. Prob. Code § 1600. Majority, death, adoption, or emancipation of ward

(a) A guardianship of the person or estate or both terminates when the ward attains majority unless, pursuant to Section 1510.1, the ward requests the extension of, or consents to the extension of, the guardianship of the person until the ward attains 21 years of age.

(b) A guardianship of the person terminates upon the death of the ward, the adoption of the ward, or upon the emancipation of the ward under Section 7002 of the Family Code.

(c) A guardianship of the estate terminates upon the death of the ward, except as provided by Section 2467 and Article 4 (commencing with Section 2630) of Chapter 7 of Part 4, and except as otherwise provided by law.



RUBH – PG Policy 301 – General Powers– Probate Conservatorship of the Person

Cal. Prob. Code § 1880. Determination by court: order

If the court determines that there is no form of medical treatment for which the conservatee has the capacity to give an informed consent, the court shall (1) adjudge that the conservatee lacks the capacity to give informed consent for medical treatment and (2) by order give the conservator of the person the powers specified in Section 2355. If an order is made under this section, the letters shall include a statement that the conservator has the powers specified in Section 2355.

- B. Medical Consent
 1. If a conservatee has been adjudicated to lack the capacity to consent to medical treatment, the conservator shall have the exclusive right to consent to medical treatment.

Cal. Welf. & Inst. Code § 5004.5 Reports of crime: complaints

(a) Notwithstanding any other law, a legal guardian, conservator, or other person who reasonably believes a person with a mental health disorder or developmental disability is the victim of a crime may file a report with an appropriate law enforcement agency. The report shall specify the nature of the alleged offense and any pertinent evidence. Notwithstanding any other law, the information in that report shall not be deemed confidential in any

manner. No person shall incur any civil or criminal liability as a result of making a report authorized by this section unless it can be shown that a false report was made and the person knew or should have known that the report was false.

Cal. Prob. Code § 1800. Purpose of chapter

It is the intent of the Legislature in enacting this chapter to do the following:

- (a) Protect the rights of persons who are placed under conservatorship.
- (b) Provide that an assessment of the needs of the person is performed in order to determine the appropriateness and extent of a conservatorship and to set goals for increasing the conservatee's functional abilities to whatever extent possible.
- (c) Provide that the health and psychosocial needs of the proposed conservatee are met.
- (d) Provide that community-based services are used to the greatest extent in order to allow the conservatee to remain

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as independent and in the least restrictive setting as possible.

(e) Provide that the periodic review of the conservatorship by the court investigator shall consider the best interests of the conservatee.

(f) Ensure that the conservatee's basic needs for physical health, food, clothing, and shelter are met.

(g) Provide for the proper management and protection of the conservatee's real and personal property.

Cal. Prob. Code § 1830. Order appointing conservator or limited conservator for developmentally disabled adult; contents

(c) An information notice of the rights of conservatees shall be attached to the order. The conservator shall deliver pursuant to Section 1215 the order and the attached information notice to the conservatee and the conservatee's relatives, as set forth in subdivision (b) of Section 1821, within 30 days of the issuance of the order. By January 1, 2008, the Judicial Council shall develop the notice required by this subdivision.

Cal. Prob. Code § 1863. Hearing and judgment

(a) The court shall hear and determine the matter according to the law and procedure relating to the trial of civil actions, including trial by jury if demanded by the conservatee. The conservator, the conservatee, the spouse or domestic partner, or any relative or friend of the conservatee or other interested person may appear and support or oppose the termination of the conservatorship.

(b)(1) The conservatee shall be produced at the hearing except in the following cases:

(A) When the conservatee is out of the state and is not the petitioner.

(B) When the conservatee is unable to attend the hearing by reason of medical inability.

(C) When the court investigator has reported to the court that the conservatee has expressly communicated that the conservatee (i) is not willing to attend the hearing, (ii) does not wish to contest the continuation of the conservatorship, and (iii) does not object to the current conservator or prefer that another person act as conservator, and the court makes an order that the conservatee need not attend the hearing.

Statute	Public Guardian Policies and Procedures	Care Standard Discussed in Manual?
<p>(2) If the conservatee is unable to attend the hearing because of medical inability, that inability shall be established by the affidavit or certificate of a licensed medical practitioner or, if the conservatee is an adherent of a religion whose tenets and practices call for reliance on prayer alone for healing and is under treatment by an accredited practitioner of that religion, by the affidavit of the practitioner. The affidavit or certificate is evidence only of the conservatee's inability to attend the hearing and shall not be considered in determining the issue of need for the continuation of the</p> <p>(3) Emotional or psychological instability is not good cause for the absence of the conservatee from the hearing unless, by reason of that instability, attendance at the hearing is likely to cause serious and immediate physiological damage to the conservatee.</p> <p>(c) Unless the court determines, on the record and by clear and convincing evidence, that (1) the conservatee still meets the criteria for appointment of a conservator of the person under subdivision (a) of Section 1801, a conservator of the estate under subdivision (b) of Section 1801, or both; and (2) a conservatorship remains the least restrictive alternative needed for the conservatee's protection, as required</p>	<p><u>RUBH – PG Policy 300.2 – Probate Conservatorship Investigation</u></p> <p>When an investigator is recommended, the Public Guardian Investigator shall [. . .] determine if the Proposed conservatee is able to attend the court hearing.</p> <p>b. if not able to attend court hearing, the PGI shall be responsible for obtaining a Declaration of Medical Inability to attend court hearing.</p>	<p>✓</p>

Statute	Public Guardian Policies and Procedures	Care Standard Discussed in Manual?
<p>by subdivision (b) of Section 1800.3, the court shall enter judgment terminating the conservatorship.</p> <p>(d) If the court determines, by clear and convincing evidence, that the conservatee meets the criteria for appointment of a conservator of the person under subdivision (a) of Section 1801, a conservator of the estate under subdivision (b) of Section 1801, or both, the court shall determine whether to modify the existing powers of the conservator to ensure that the conservatorship remains the least restrictive alternative needed for the conservatee's protection and shall order the conservatorship to continue accordingly. If the court modifies the existing powers of the conservator, new letters shall issue.</p> <p>(e) At the hearing, or thereafter on further notice and hearing, the conservator may be discharged and the bond given by the conservator may be exonerated upon the settlement and approval of the conservator's final account by the court.</p> <p>(f) This section does not apply to limited conservatorships.</p> <p>(g) Termination of conservatorship does not preclude a new proceeding for appointment of a conservator on the same or other grounds.</p>		

Cal. Prob. Code § 2113. Balance of conflicting interests

A conservator shall accommodate the desires of the conservatee, except to the extent that doing so would violate the conservator's fiduciary duties to the conservatee or impose an unreasonable expense on the conservatorship estate.

Cal. Prob. Code § 2430. Payments from principal and income; debts and expenses

(a) Subject to subdivisions (b) and (c), the guardian or conservator shall pay the following from any principal and income of the estate:

(1) The debts incurred by the ward or conservatee before creation of the guardianship or conservatorship, giving priority to the debts described in Section 2431 to the extent required by that section.

(2) The debts incurred by the ward or conservatee during the guardianship or conservatorship to provide the necessities of life to the ward or conservatee, and to the spouse and minor children of the ward or conservatee, to

RUBH – PG Policy 380 – General Sales Procedures

The guardian or conservator may sell personal property of estate in any of the following cases:

2. The personal Property of the estate and income from real property of the estate is insufficient to pay the debts referred to in section 2430 and 2431.



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the extent the debt is reasonable. Also, the debts reasonably incurred by the conservatee during the conservatorship to provide the basic living expenses, as defined in Section 297 of the Family Code, to the domestic partner of the conservatee. The guardian or conservator may deduct the amount of any payments for these debts from any allowance otherwise payable to the ward or conservatee.

(3) In the case of a conservatorship, any other debt incurred by the conservatee during the conservatorship only if the debt satisfies the requirements of any order made under Chapter 4 (commencing with Section 1870) of Part 3.

(4) The reasonable expenses incurred in the collection, care, and administration of the estate, but court authorization is required for payment of compensation to any of the following:

(A) The guardian or conservator of the person or estate or both.

(B) An attorney for the guardian or conservator of the person or estate or both.

(C) An attorney for the ward or conservatee.

Statute	Public Guardian Policies and Procedures	Care Standard Discussed in Manual?
<p>(D) An attorney for the estate.</p> <p>(E) The public guardian for the costs and fee under Section 2902.</p> <p>(b) The payments provided for by paragraph (3) of subdivision (a) are not required to be made to the extent the payments would impair the ability to provide the necessities of life to the conservatee and the spouse and minor children of the conservatee and to provide the basic living expenses, as defined in Section 297 of the Family Code, of the domestic partner of the conservatee.</p> <p>(c) The guardian or conservator may petition the court under Section 2403 for instructions when there is doubt whether a debt should be paid under this section.</p>		
<p><u>Cal. Prob. Code § 2431. Wage claims; priority</u></p> <p>(a) Subject to subdivision (d), the guardian or conservator may petition the court under Section 2403 for instructions when there is doubt whether a wage claim should be paid under this section.</p> <p>(b) The guardian or conservator shall promptly pay wage claims for work done or services rendered for the ward or conservatee within 30 days prior to the date the petition for</p>	<p><u>RUBH – PG Policy 380 – General Sales Procedures</u></p> <p>The guardian or conservator may sell personal property of estate in any of the following cases:</p> <ol style="list-style-type: none"> 2. The personal Property of the estate and income from real property of the estate is 	<p>✓</p>

appointment of the guardian or conservator was filed. The payments made pursuant to this subdivision shall not exceed nine hundred dollars (\$900) to each claimant. If there is insufficient money to pay all the claims described in this subdivision up to nine hundred dollars (\$900), the money available shall be distributed among such claimants in proportion to the amount of their respective claims.

(c) After the payments referred to in subdivision (b) have been made, the guardian or conservator shall pay wage claims for work done or services rendered for the ward or conservatee within 90 days prior to the date the petition for appointment of the guardian or conservator was filed, excluding the claims described in subdivision (b). The payments made pursuant to this subdivision shall not exceed one thousand one hundred dollars (\$1,100) to each claimant. If there is insufficient money to pay all the claims described in this subdivision up to one thousand one hundred dollars (\$1,100), the money available shall be distributed among such claimants in proportion to the amounts of their respective claims.

(d) The guardian or conservator may require sworn claims to be presented. If there is reasonable cause to believe that the claim is not valid, the guardian or conservator may refuse to pay the claim in whole or in part but shall pay any

part thereof that is not disputed without prejudice to the claimant's rights as to the balance of the claim. The guardian or conservator shall withhold sufficient money to cover the disputed portion until the claimant has had a reasonable opportunity to establish the validity of the claim by bringing an action, either in the claimant's own name or through an assignee, against the guardian or conservator.

(e) If the guardian or conservator neglects or refuses to pay all or any portion of a claim which is not in dispute, the court shall order the guardian or conservator to do so upon the informal application of any wage claimant or the assignee or legal representative of such claimant.

*** The following references found in the Public Guardian Handbook are to outdated statutes. These references should be updated in the Handbook to assure compliance.

Statute	Public Guardian Policies and Procedures Discussed in Manual?	Care Standard Discussed in Manual?
<p><u>Outdated Citations:</u> <u>Cal. Prob. Code § 3200. Definitions:</u> Nothing to do with establishing conservatorship.</p>	<p><u>Outdated Reference:</u> <u>RUBH—PG Policy 300 – Probate Conservatorship Policy</u> C. The Public Guardian shall not petition to act as the Probate conservator for any of the following reasons: 1. For the Sole Purpose of providing medical consent. Existing State law provides a mechanism for obtaining medical consent without the necessity of establishing a Conservatorship (Probate Code Section 3200)</p>	
<p><u>Cal. Welf. & Inst. Code §§ 8000 to 8013. Repealed by Stats.1988, c. 1199, §§ 110 to 117, operative July 1, 1989</u></p>	<p><u>RUBH – PG Policy 408 – Revenue Interest</u> Cites to W & I 8009 – repealed</p>	

Stature	Public Guardian Policies and Procedures	Care Standard Discussed in Manual?
<p><u>Cal. Welf. & Inst. Code §§ 8000 to 8013. Repealed by Stats.1988, c. 1199, §§ 110 to 117, operative July 1, 1989</u></p>	<p><u>RUBH – PG Policy 300.2 – Probate Conservatorship Investigation</u></p> <p>3. Public Guardian Investigator shall determine if the Proposed Conservatee is able to attend the court hearing.</p> <p>e. If any assets require protection under provisions of the Welfare and Institution Code Section 8006, the Public Guardian Investigator shall marshal those items.</p>	<p>xx</p>

Appendix K: Adult Protective Services Policies

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p><u>Cal. Welf. & Inst. Code § 10851 Public social services case records; establishment and maintenance; retention; destruction</u></p>	<p>(c) Each county shall maintain fiscal, statistical, and other records necessary for maintaining accountability and meeting reporting requirements relating to the administration of public social services. These fiscal and reporting records shall be retained for a minimum period of three years from the date of submission of the final expenditure report and shall be retained beyond the three-year period when audit findings have not been resolved.</p>	
<p><u>Cal. Welf. & Inst. Code § 10851.5 Retention of records to determine months of received aid; automated system for tracking; alternative nonautomated format; failure to provide information; good cause standards and appeal process; expending funds; adoption of regulations</u></p>		<p>(a) Notwithstanding Section 10851, each county shall retain all records that are necessary to determine the number of months each adult recipient has received aid</p>

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subject to the time limits provided in Section 11454 and Section 608(a)(7) of Title 42 of the United States Code. The county shall retain the records for the period of time established by the department by regulation.

(b) Each county shall provide case record information to the department's automated system for tracking the period of time a recipient has received aid. Each county shall provide information, as determined by the department, to the department's automated system that is sufficient to allow reliable determinations of the number of months each adult recipient of aid has received aid for purposes of Section 11454 and Section 608(a)(7) of Title 42 of the United States Code. The department shall, pursuant to the adoption of emergency regulations, specify the case record information that each county shall provide under this section.

Cal. Welf. & Inst. Code § 15630 Mandated reporters; known or suspected abuse; telephone or Internet reports; failure to report; impeding or inhibiting report; penalties

(a) A person who has assumed full or intermittent responsibility for the care or custody of an elder or dependent adult, whether or not they receive compensation, including administrators, supervisors, and any licensed staff of a public or private facility that provides care or services for elder or dependent adults, or any elder or dependent adult care custodian, health practitioner, clergy member, or employee of a county adult protective services agency or a local law enforcement agency, is a mandated reporter.

APS Policy Manual – Module 1: Adult Protect Services intake – Chapter 2. Reporting Party

A reporting party (RP) is an individual who files a report of any known or suspected instance of elder abuse or neglect to Adult Protective Services. Mandated reporters must report any reasonable suspicion of elder or dependent abuse or neglect (WIC 15630) by phone and written report. Mandated reporters are protected from civil or criminal liability as a result of any required reporting responsibilities. The identity of all reporting parties for APS referrals is confidential and shall only be released under limited circumstances.



(b)(1) A mandated reporter who, in their professional capacity, or within the scope of their employment, has observed or has knowledge of an incident that reasonably appears to be physical abuse, as defined in Section

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>15610.63, abandonment, abduction, isolation, financial abuse, or neglect, or is told by an elder or dependent adult that they have experienced behavior, including an act or omission, constituting physical abuse, as defined in Section 15610.63, abandonment, abduction, isolation, financial abuse, or neglect, or reasonably suspects that abuse, shall report the known or suspected instance of abuse by telephone or through a confidential internet reporting tool, as authorized by Section 15658, immediately or as soon as practicably possible. If reported by telephone, a written report shall be sent, or an internet report shall be made through the confidential internet reporting tool established in Section 15658, within two working days.</p> <p>(A) If the suspected or alleged abuse is physical abuse, as defined in Section 15610.63, and the abuse occurred in a long-term care facility, except a state mental health hospital or a state developmental center, the following shall occur:</p> <p>(i) If the suspected abuse results in serious bodily injury, a telephone report shall be made to the local law enforcement agency immediately, but also no later than within two hours of the mandated reporter observing, obtaining knowledge of, or suspecting the physical abuse,</p>		

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and a written report shall be made to the local ombudsman, the corresponding licensing agency, and the local law enforcement agency within two hours of the mandated reporter observing, obtaining knowledge of, or suspecting the physical abuse.

(ii) If the suspected abuse does not result in serious bodily injury, a telephone report shall be made to the local law enforcement agency within 24 hours of the mandated reporter observing, obtaining knowledge of, or suspecting the physical abuse, and a written report shall be made to the local ombudsman, the corresponding licensing agency, and the local law enforcement agency within 24 hours of the mandated reporter observing, obtaining knowledge of, or suspecting the physical abuse.

(iii) When the suspected abuse is allegedly caused by a resident with a physician's diagnosis of dementia, and there is no serious bodily injury, as reasonably determined by the mandated reporter, drawing upon their training or experience, the reporter shall report to the local ombudsman or law enforcement agency by telephone, immediately or as soon as practicably possible, and by written report, within 24 hours.

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>(iv) When applicable, reports made pursuant to clauses (i) and (ii) shall be deemed to satisfy the reporting requirements of the federal Elder Justice Act of 2009, as set out in Subtitle H of the federal Patient Protection and Affordable Care Act (Public Law 111-148),¹ Section 1418.91 of the Health and Safety Code, and Section 72541 of Title 22 of the California Code of Regulations. When a local law enforcement agency receives an initial report of suspected abuse in a long-term care facility pursuant to this subparagraph, the local law enforcement agency may coordinate efforts with the local ombudsman to provide the most immediate and appropriate response warranted to investigate the mandated report. The local ombudsman and local law enforcement agencies may collaborate to develop protocols to implement this subparagraph.</p> <p>(C) If the suspected or alleged abuse is abuse other than physical abuse, and the abuse occurred in a long-term care facility, except a state mental health hospital or a state developmental center, a telephone report and a written report shall be made to the local ombudsman or the local law enforcement agency.</p> <p>(E)(i) If the suspected or alleged abuse or neglect occurred in a state mental hospital or a state</p>		

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developmental center, and the suspected or alleged abuse or neglect resulted in any of the following incidents, a report shall be made immediately, but no later than within two hours of the mandated reporter observing, obtaining knowledge of, or suspecting abuse, to designated investigators of the State Department of State Hospitals or the State Department of Developmental Services, and to the local law enforcement agency:

- (I) A death.
- (II) A sexual assault, as defined in Section 15610.63.
- (III) An assault with a deadly weapon, as described in Section 245 of the Penal Code, by a nonresident of the state mental hospital or state developmental center.
- (IV) An assault with force likely to produce great bodily injury, as described in Section 245 of the Penal Code.
- (V) An injury to the genitals when the cause of the injury is undetermined.
- (VI) A broken bone when the cause of the break is undetermined.

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- (ii) All other reports of suspected or alleged abuse or neglect that occurred in a state mental hospital or a state developmental center shall be made immediately, but no later than within two hours of the mandated reporter observing, obtaining knowledge of, or suspecting abuse, to designated investigators of the State Department of State Hospitals or the State Department of Developmental Services, or to the local law enforcement agency.
- (iii) When a local law enforcement agency receives an initial report of suspected or alleged abuse or neglect in a state mental hospital or a state developmental center pursuant to clause (i), the local law enforcement agency shall coordinate efforts with the designated investigators of the State Department of State Hospitals or the State Department of Developmental Services to provide the most immediate and appropriate response warranted to investigate the mandated report. The designated investigators of the State Department of State Hospitals or the State Department of Developmental Services and local law enforcement agencies may collaborate to develop protocols to implement this clause.
- (iv) Except in an emergency, the local law enforcement agency shall, as soon as practicable, report any case of

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>known or suspected criminal activity to the Division of Medi-Cal Fraud and Elder Abuse.</p> <p>(v) Notwithstanding any other law, a mandated reporter who is required to report pursuant to Section 4427.5 shall not be required to report under clause (i).</p> <p>(F) If the abuse has occurred in any place other than a long-term care facility, a state mental hospital, or a state developmental center, the report shall be made to the adult protective services agency or the local law enforcement agency.</p> <p>(c)(1) Any mandated reporter who has knowledge, or reasonably suspects, that types of elder or dependent adult abuse for which reports are not mandated have been inflicted upon an elder or dependent adult, or that their emotional well-being is endangered in any other way, may report the known or suspected instance of abuse.</p> <p>(e) A telephone report or internet report, as authorized by Section 15658, of a known or suspected instance of elder or dependent adult abuse shall include, if known, the name of the person making the report, the name and age of the elder or dependent adult, the present location of</p>		

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the elder or dependent adult, the names and addresses of family members or any other adult responsible for the elder's or dependent adult's care, the nature and extent of the elder's or dependent adult's condition, the date of the incident, and any other information, including information that led that person to suspect elder or dependent adult abuse, as requested by the agency receiving the report.

(f) The reporting duties under this section are individual, and no supervisor or administrator shall impede or inhibit the reporting duties, and no person making the report shall be subject to any sanction for making the report. However, internal procedures to facilitate reporting, ensure confidentiality, and apprise supervisors and administrators of reports may be established, provided they are not inconsistent with this chapter.

(g)(1) Whenever this section requires a county adult protective services agency to report to a law enforcement agency, the law enforcement agency shall, immediately upon request, provide a copy of its investigative report concerning the reported matter to that county adult protective services agency.

(2) Whenever this section requires a law enforcement agency to report to a county adult protective services

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>agency, the county adult protective services agency shall, immediately upon request, provide to that law enforcement agency a copy of its investigative report concerning the reported matter.</p>		
<p>(3) The requirement to disclose investigative reports pursuant to this subdivision shall not include the disclosure of social services records or case files that are confidential, nor shall this subdivision allow disclosure of any reports or records if the disclosure would be prohibited by any other state or federal law.</p>		
<p>(h) Failure to report, or impeding or inhibiting a report of, physical abuse, as defined in Section 15610.63, abandonment, abduction, isolation, financial abuse, or neglect of an elder or dependent adult, in violation of this section, is a misdemeanor, punishable by not more than six months in the county jail, by a fine of not more than one thousand dollars (\$1,000), or by both that fine and imprisonment. A mandated reporter who willfully fails to report, or impedes or inhibits a report of, physical abuse, as defined in Section 15610.63, abandonment, abduction, isolation, financial abuse, or neglect of an elder or dependent adult, in violation of this section, if that abuse results in death or great bodily injury, shall be punished by not more than one year in a county jail, by a fine of not</p>		

more than five thousand dollars (\$5,000), or by both that fine and imprisonment. If a mandated reporter intentionally conceals their failure to report an incident known by the mandated reporter to be abuse or severe neglect under this section, the failure to report is a continuing offense until a law enforcement agency specified in paragraph (1) of subdivision (b) of Section 15630 discovers the offense.

Cal. Welf. & Inst. Code § 15631 Nonmandated reporters: known or suspected abuse

(b) Any person who is not a mandated reporter under Section 15630, who knows, or reasonably suspects, that an elder or a dependent adult has been the victim of abuse in any place other than a long-term care facility may report the abuse to the county adult protective services agency or local law enforcement agency.

Cal. Welf. & Inst. Code § 15633.5 Information given to investigator: reporting person's identity: confidentiality

(a)(1) Information relevant to the incident of elder or dependent adult abuse shall be given to an investigator from an adult protective services agency, a local law enforcement agency, the office of the District Attorney,

the office of the public guardian, the probate court, the division, the Department of Financial Protection and Innovation, or an investigator of the Department of Consumer Affairs, Division of Investigation, who is investigating a known or suspected case of elder or dependent adult abuse.

Cal. Welf. & Inst. Code § 15636 Victim's refusal or withdrawal of consent; long-term care ombudsman; temporary conservatorship or guardianship

(a) Any victim of elder or dependent adult abuse may refuse or withdraw consent at any time to an investigation or the provision of protective services by an adult protective services agency or long-term care ombudsman program. The adult protective services agency shall act only with the consent of the victim unless a violation of the Penal Code has been alleged. A local long-term care ombudsman shall act only with the consent of the victim and shall disclose confidential information only after consent to disclose is given by the victim or pursuant to court order.

(b) If the elder or dependent adult abuse victim is so incapacitated that he or she cannot legally give or deny

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consent to protective services, a petition for temporary conservatorship or guardianship may be initiated in accordance with Section 2250 of the Probate Code.

Section B – Interviews – Completing the Investigation without Client Consent

The social worker shall continue the APS investigation even if the client refuses services or has been determined to not have capacity to consent if one of the following situations exists: The client is at risk of serious injury, death, or significant loss, in which case the social worker shall continue the investigation in order to determine the need for involuntary services (e.g. conservatorship) consistent with WIC 15636(b).

Cal. Welf. & Inst. Code § 15640 Criminal activity and abuse instances requiring reports: referring agencies; abuse by licensed health practitioners; abuse at long-term care facilities; consent of victim for reporting; neglect or abandonment

(a)(1) An adult protective services agency shall immediately, or as soon as practically possible, report by telephone to the law enforcement agency having jurisdiction over the case any known or suspected instance of criminal activity, and to any public agency given responsibility for investigation in that jurisdiction of

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cases of elder and dependent adult abuse, every known or suspected instance of abuse of an elder or dependent adult pursuant to Section 15630, 15630.1, or 15630.2. A county adult protective services agency shall also send a written report thereof within two working days of receiving the information concerning the incident to each agency to which it is required to make a telephone report under this subdivision. Before making any cross-report of allegations of financial abuse to law enforcement agencies, an adult protective services agency shall first determine whether there is reasonable suspicion of any criminal activity.

The social worker shall cross report the APS case to law enforcement within 24 hours by sending the SOC 341/342 under the following conditions (MPP 33-515):

The social worker substantiated the allegations of financial abuse and there is reasonable suspicion of criminal activity defined under W&IC15640(a)(1).

(2) If an adult protective services agency receives a report of abuse alleged to have occurred in a long-term care facility, that adult protective services agency shall immediately inform the person making the report that they are required to make the report to the long-term care ombudsman program or to a local law enforcement agency. The adult protective services agency shall not accept the report by telephone but shall forward any written report received to the long-term care ombudsman.

(b) If an adult protective services agency or local law enforcement agency or ombudsman program receiving a report of known or suspected elder or dependent adult abuse determines, pursuant to its investigation, that the


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abuse is being committed by a health practitioner licensed under Division 2 (commencing with Section 500) of the Business and Professions Code, or any related initiative act, or by a person purporting to be a licensee, the adult protective services agency or local law enforcement agency or ombudsman program shall immediately, or as soon as practically possible, report this information to the appropriate licensing agency. The licensing agency shall investigate the report in light of the potential for physical harm. The transmittal of information to the appropriate licensing agency shall not relieve the adult protective services agency or local law enforcement agency or ombudsman program of the responsibility to continue its own investigation as required under applicable provisions of law. The information reported pursuant to this subdivision shall remain confidential and shall not be disclosed.

(c) A local law enforcement agency shall immediately, or as soon as practically possible, report by telephone to the long-term care ombudsman program when the abuse is alleged to have occurred in a long-term care facility or to the county adult protective services agency when it is alleged to have occurred anywhere else, and to the agency given responsibility for the investigation of cases of elder and dependent adult abuse every known or

suspected instance of abuse of an elder or dependent adult. A local law enforcement agency shall also send a written report thereof within two working days of receiving the information concerning the incident to any agency to which it is required to make a telephone report under this subdivision.

(d) A long-term care ombudsman coordinator may report the instance of abuse to the county adult protective services agency or to the local law enforcement agency for assistance in the investigation of the abuse if the victim gives their consent. A long-term care ombudsman program and the Licensing and Certification Division of the State Department of Public Health shall immediately report by telephone and in writing within two working days to the Division of Medi-Cal Fraud and Elder Abuse any instance of neglect occurring in a health care facility that has seriously harmed any patient or reasonably appears to present a serious threat to the health or physical well-being of a patient in that facility. If a victim or potential victim of the neglect withholds consent to being identified in that report, the report shall contain circumstantial information about the neglect, but shall not identify that victim or potential victim. The Division of Medi-Cal Fraud and Elder Abuse and the reporting agency shall maintain

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>the confidentiality of the report until the report becomes a matter of public record.</p> <p>(e) When a county adult protective services agency, a long-term care ombudsman program, or a local law enforcement agency receives a report of abuse, neglect, or abandonment of an elder or dependent adult alleged to have occurred in a long-term care facility, that county adult protective services agency, long-term care ombudsman coordinator, or local law enforcement agency shall report the incident to the licensing agency by telephone as soon as possible.</p>		
<p>(f) County adult protective services agencies, long-term care ombudsman programs, and local law enforcement agencies shall report the results of their investigations of referrals or reports of abuse to the respective referring or reporting agencies.</p>	<p><u>APS Policy Manual – Module 2: Adult Protective Services investigations – Section B – Reporting Party Contact</u></p> <p>Report the results of the investigation to the mandated reporting party representing a local law enforcement agency or long-term care ombudsman program (W&IC 15640(f)).</p>	

APS Policy Manual – Module 2: Adult Protective Services investigations

Cal. Welf. & Inst. Code § 15650 Investigation of reports of known or suspected abuse; responsibility; other involved public agencies; inventories of services available to help victims

- (a) Investigation of reports of known or suspected instances of abuse in long-term care facilities shall be the responsibility of the division, the local law enforcement agency, and the long-term care ombudsman program.
- (b) Investigations of known or suspected instances of abuse outside of long-term care facilities shall be the responsibility of the county adult protective services agency, unless another public agency is given responsibility for investigation in that jurisdiction, and the local law enforcement agency.
- (c) The investigative responsibilities set forth in this section are in addition to, and not in derogation of or substitution for, the investigative and regulatory responsibilities of licensing agencies, such as the State Department of Social Services Community Care Licensing Division and the State Department of Public Health Licensing and Certification Division and their authorized representatives.

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p><u>Cal. Welf. & Inst. Code § 15651 Referral of individuals with complex or intensive needs by county adult protective service agencies and the Home Safe Program</u></p>	<p>County adult protective service agencies and the Home Safe Program, as established in Chapter 14 (commencing with Section 15770), may refer individuals with complex or intensive needs to the appropriate state or local agencies, as determined by the adult protective services agency or the Home Safe Program case workers, and based on a determination that the individual may be eligible for services and that those services may support the individual's safety goals. A referral may be made before or after an individual begins to receive adult protective services, and a referral does not preclude the individual from receiving adult protective services or Home Safe program services.</p>	
<p><u>Cal. Welf. & Inst. Code § 15654 Training programs; investigating and prosecuting criminal abuse; training materials</u></p>		<p>(a) As described in subdivision (h) of Section 12528 of the Government Code, the division shall offer training programs to local law enforcement and prosecutorial</p>

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personnel in investigating and prosecuting crimes against elders and dependent adults, and to the State Department of Health Care Services, the State Department of Social Services, the county adult protective services agencies and to the long-term care ombudsman program in evaluating and documenting criminal abuse against elders and dependent adults.

(b) When producing new or updated training materials pursuant to this section, the division shall consult with the Commission on Peace Officer Standards and Training and other subject matter experts. Any new or updated training materials shall address all of the following:

(1) The jurisdiction and responsibility of law enforcement agencies pursuant to Section 368.5 of the Penal Code.

(2) The fact that the protected classes of "dependent person" as defined in Section 288 of the Penal Code and "dependent adult" as defined in Section 368 of the Penal Code include many persons with disabilities, regardless of the fact that most of those persons live independently.

(3) Other relevant information and laws.

(c) When the division offers or provides new or updated training materials pursuant to this section,

the division also may inform the agencies of other relevant training materials.

Cal. Welf. & Inst. Code § 15655 Training on elder and dependent adult abuse: long-term health care facility, community care facility and residential care facility for the elderly; facility review

(a)(1) Each long-term health care facility, as defined in Section 1418 of the Health and Safety Code, community care facility, as defined in Section 1502 of the Health and Safety Code, or residential care facility for the elderly, as defined in Section 1569.2 of the Health and Safety Code, that provides care to adults shall provide training in recognizing and reporting elder and dependent adult abuse, as prescribed by the Department of Justice. The Department of Justice shall, in cooperation with the State Department of Health Services and the State Department of Social Services, develop a minimal core training program for use by these facilities. As part of that training, long-term care facilities, including nursing homes and out-of-home care facilities, shall provide to all staff being trained a written copy of the reporting requirements and a written notification of the staff's confidentiality rights as specified in Section 15633.5.

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- (2) Each long-term health care facility, as defined in Section 1418 of the Health and Safety Code, and each community care facility as defined in Section 1502 of the Health and Safety Code, shall comply with paragraph (1) by January 1, 2001, or, if the facility began operation after July 31, 2000, within six months of the date of the beginning of the operation of the facility. Employees hired after June 1, 2001, shall be trained within 60 days of their first day of employment.
- (3) Each residential care facility, as defined in Section 1569.2 of the Health and Safety Code, shall comply with paragraph (1) by July 1, 2002, or, if the facility began operation after July 1, 2002, within six months of the date of the beginning of the operation of the facility. Employees hired on or after July 1, 2002, shall be trained within 60 days of their first day of employment.
- (b) Each long-term health care facility, as defined in Section 1418 of the Health and Safety Code, shall be subject to review by the State Department of Health Services Licensing and Certification Unit for compliance with the duties imposed in subdivision (a).

Cal. Welf. & Inst. Code § 15655.5 Provision of instructional materials regarding elder and dependent adult abuse and neglect and reporting requirements to specified organizations and mandated reporters: contents

A county adult protective services agency shall provide the organizations listed in subdivisions (v), (w), and (x) of Section 15610.17, and mandated reporters of suspected financial abuse of an elder or dependent adult pursuant to Sections 15630.1 and 15630.2, with instructional materials regarding abuse and neglect of an elder or dependent adult and their obligation to report under this chapter. At a minimum, the instructional materials shall include the following:

- (a) An explanation of abuse and neglect of an elder or dependent adult, as defined in this chapter.
- (b) Information on how to recognize potential abuse and neglect of an elder or dependent adult.
- (c) Information on how the county adult protective services agency investigates reports of known or suspected abuse and neglect.

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>(d) Instructions on how to report known or suspected incidents of abuse and neglect, including the appropriate telephone numbers to call and what types of information would assist the county adult protective services agency with its investigation of the report.</p>		
<p><u>Cal. Welf. & Inst. Code § 15657.03 Protective orders</u></p>		
<p>(a)(1) An elder or dependent adult who has suffered abuse, as defined in Section 15610.07, may seek protective orders as provided in this section.</p>	<p><u>APS Policy Manual – Module 2: Adult Protective Services investigations, Chapter 3, Section B</u></p>	
<p>(3)(A) A petition under this section may be brought on behalf of an elder or dependent adult by a county adult protective services agency in either of the following circumstances:</p>		
<p>(i) If the elder or dependent adult has suffered abuse as defined in subdivision (b) and has an impaired ability to appreciate and understand the circumstances that place the elder or dependent at risk of harm.</p>		
<p>(ii) If the elder or dependent adult has provided written authorization to a county adult protective services agency to act on that person's behalf.</p>		

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>(B) In the case of a petition filed pursuant to clause (i) of subparagraph (A) by a county adult protective services agency, a referral shall be made to the public guardian consistent with Section 2920 of the Probate Code prior to or concurrent with the filing of the petition, unless a petition for appointment of a conservator has already been filed with the probate court by the public guardian or another party.</p>		
<p>(C) A county adult protective services agency shall be subject to any confidentiality restrictions that otherwise apply to its activities under law and shall disclose only those facts as necessary to establish reasonable cause for the filing of the petition, including, in the case of a petition filed pursuant to clause (i) of subparagraph (A), to establish the agency's belief that the elder or dependent adult has suffered abuse and has an impaired ability to appreciate and understand the circumstances that place the elder or dependent adult at risk, and as may be requested by the court in determining whether to issue an order under this section.</p>		

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p><u>Cal. Welf. & Inst. Code § 15760 Included adult protective services</u></p> <p>Adult protective services shall include investigations, needs assessments, remedial and preventive social work activities; the necessary tangible resources such as food, transportation, emergency shelter, and In-home protective care; the use of multidisciplinary teams; and a system in which reporting of abuse can occur on a 24-hour basis.</p>		
<p><u>Cal. Welf. & Inst. Code § 15762 Report of abuse; social worker meeting with alleged victim</u></p>	<p><u>APS Policy Manual – Module 1: Adult Protective Services Intake</u></p>	
<p>When an allegation of abuse of an elder or dependent adult is reported to a county designated adult protective service agency and an agency social worker has reason to believe an elder or dependent adult has suffered or is at substantial risk of abuse pursuant to Section 15630, the social worker shall attempt to obtain consent to enter and meet privately with the elder or dependent adult about whom the report was made in the residence or dwelling in which the elder or dependent adult resides without the presence of the person's caretaker, attendant, or family or household member, unless the person requests the</p>	<p><u>APS Policy Manual – Module 2: Adult Protective Services Investigations</u></p>	

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presence of the attendant, care giver, or family member, or refuses to meet with the social worker.

Cal. Welf. & Inst. Code § 15763 Establishment of an emergency response adult protective services program policies and procedures

(a) Each county shall establish an emergency response adult protective services program that shall provide in-person response, 24 hours per day, seven days per week, to reports of abuse of an elder or a dependent adult, for the purpose of providing immediate intake or intervention, or both, to new reports involving immediate life threats and to crises in existing cases. The program shall include policies and procedures to accomplish all of the following:

- (1) Provision of case management services that include investigation of the protection issues, assessment of the person's concerns, needs, strengths, problems, and limitations, stabilization and linking with community

APS Policy Manual – Module 1: Adult Protective Services Intake

State regulations require APS to provide free public telephone access to a 24-hour hotline system to receive reports of suspected abuse or neglect of elder and dependent adults. The Adult Services Division's APS Hotline is a toll-free number and inaccessible for the deaf and hearing impaired via a Telecommunications Device for the Deaf (TDD/TTY). All reports of elder and dependent adult abuse in Riverside County can be made by calling the following number:



<p>services, and development of a service plan to alleviate identified problems utilizing counseling, monitoring, followup, and reassessment.</p> <p>(2) Provisions for emergency shelter or In-home protection to guarantee a safe place for the elder or dependent adult to stay until the dangers at home can be resolved.</p> <p>(3) Establishment of multidisciplinary teams to develop interagency treatment strategies, to ensure maximum coordination with existing community resources, to ensure maximum access on behalf of elders and dependent adults, and to avoid duplication of efforts. The multidisciplinary team may include community-based agencies, health plans, and other state- and county-based service providers.</p>	<p><u>APS Policy Manual – Module 3: Program Support and Resources – EAFCCore Representatives</u></p> <p>Core members of the EAFCC include the following agency representatives: APS; Riverside County Sheriff's Department; Sheriff's Office; Coroner's Office; Public Administrator's Bureau; University of California Riverside (UCR) School of Medicine; Riverside University Health System (RUHS) Behavioral Health; Public Guardian Programmatic Center Emergency Treatment Services (ETS); Riverside County District Attorney; District Attorney's Office Division of Victim Services; Riverside County Office of County Counsel; Superior Court of California, County of Riverside, Probate Court; State of</p>	<p>✓</p>
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California, Department of Justice; Office of the Attorney General; Bureau of Medi-Cal Fraud and Elder Abuse (BMFEA); Long-term Care Ombudsman Program; Riverside Legal Aid

(4) Provisions for homeless prevention through the Home Safe Program established in Chapter 14 (commencing with Section 15770), to the extent that funding is provided for this purpose in the annual Budget Act and the county receives those funds.

(b)(1) A county shall respond immediately to any report of imminent danger to an elder or dependent adult in other than a long-term care facility, as defined in Section 9701, or a residential facility, as defined in Section 1502 of the Health and Safety Code. For reports involving persons in a long-term care facility or a residential care facility, the county shall report to the local long-term care ombudsman program. Adult protective services staff shall consult, coordinate, and support efforts of the ombudsman program to protect vulnerable residents. Except as specified in paragraph (2), the county shall respond to all other reports of danger to an elder or dependent adult in other than a long-term care facility or residential care

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facility within 10 calendar days or as soon as practicably possible.

(2) An immediate or 10-day in-person response is not required when the county, based upon an evaluation of risk, determines and documents that the elder or dependent adult is not in imminent danger and that an immediate or 10-day in-person response is not necessary to protect the health or safety of the elder or dependent adult.

(d) A county shall provide case management services to elders and dependent adults who are determined to be in need of adult protective services for the purpose of bringing about changes in the lives of victims and to provide a safety net to enable victims to protect themselves in the future. Case management services shall include all of the following, to the extent services are appropriate for the individual:

(1) Investigation of the protection issues, including, but not limited to, social, medical, environmental, physical, emotional, and developmental.

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>(2) Assessment of the person's concerns and needs on whom the report has been made and the concerns and needs of other members of the family and household.</p> <p>(3) Analysis of problems and strengths.</p> <p>(4) Establishment of a service plan for each person on whom the report has been made to alleviate the identified problems.</p> <p>(5) Client input and acceptance of proposed service plans.</p> <p>(6) Counseling for clients and significant others to alleviate the identified problems and to implement the service plan.</p> <p>(7) Stabilizing and linking with community services, including, but not limited to, those provided by health plans, other county-based service providers, and community agencies.</p> <p>(8) Monitoring and followup.</p> <p>(9) Reassessments, as appropriate.</p> <p>(e)(1) To the extent resources are available, each county shall provide emergency shelter in the form of a safe haven or In-home protection for victims. Shelter and care</p>		

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>appropriate to the needs of the victim shall be provided for frail and disabled victims who are in need of assistance with activities of daily living.</p> <p>(2) To the extent a county receives grant funds under the Home Safe Program (Chapter 14 (commencing with Section 15770)), counties may provide housing assistance and support to elders and dependent adults who are homeless or at risk of becoming homeless.</p>		
<p>(f) Each county shall designate an adult protective services agency to establish and maintain multidisciplinary teams including, but not limited to, adult protective services, law enforcement, probation departments, home health care agencies, hospitals, adult protective service staff, the public guardian, private community service agencies, public health agencies, and mental health agencies for the purpose of providing interagency treatment strategies.</p>	<p><u>APS Policy Manual – Module 3: Program Support and Resources – EAFCC Core Representatives</u></p> <p>Core members of the EAFCC include the following agency representatives: APS; Riverside County Sheriff's Department; Sheriff's Office; Coroner's Office; Public Administrator's Bureau; University of California Riverside (UCR) School of Medicine; Riverside University Health System (RUHS) Behavioral Health; Public Guardian Programmatical Center Emergency Treatment Services (ETS); Riverside County District Attorney; District Attorney's Office Division of Victim Services; Riverside County Office of County Counsel; Superior Court of California,</p>	<p>✓</p>

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>(g) Each county shall provide tangible support services, to the extent resources are available, which may include, but not be limited to, emergency food, clothing, repair or replacement of essential appliances, plumbing and electrical repair, blankets, linens, and other household goods, advocacy with utility companies, and emergency response units.</p>	<p>County of Riverside, Probate Court; State of California, Department of Justice; Office of the Attorney General; Bureau of Medi-Cal Fraud and Elder Abuse (BMFEA); Long-term Care Ombudsman Program; Riverside Legal Aid</p>	
<p><u>Cal. Welf. & Inst. Code § 15766 Investigations and case management of elder and dependent adult abuse cases; county merit systems civil service employees</u></p>		
<p>The investigation of allegations of elder and dependent adult abuse pursuant to this chapter, and the case management of elder and dependent adult abuse cases shall be performed by county merit systems civil service employees. A county adult protective service agency may utilize a contracted private or nonprofit telephone answering service after normal working hours and on</p>	<p><u>APS Policy Manual – Module 1: Adult Protective Services intake – Chapter 4, Stand-By/Call-Back</u></p> <p>ASD must arrange to have screeners and responders available to provide coverage for after-hours, weekends, and holidays. All APS</p>	<p>✓</p>

Statute	Adult Protective Services Policy Manual	Care Standard Discussed in Manual?
<p>weekends and holidays. Such a contracted telephone service shall immediately forward to a county merit systems civil service employee any report of abuse or neglect of an elder or dependent adult, unless the caller is: (a) requesting routine information only; (b) reporting an incident of abuse which occurred prior to the date of the call, which does not at the time of the call put the victim at risk; or (c) requesting information not related to the adult protective service program, and the person answering the telephone meets the standards established by the department.</p>	<p>social workers shall participate in SBCB based on business needs.</p>	

Appendix L: Summary of Recommendations

Appendix I provides a summary of recommendations, including benchmarks, timelines, and action steps if applicable. It also sets forth the positions or units responsible for carrying out the recommendations for the following:

1. Children's Services Division
2. Office of Public Guardian
3. Appointed Counsel
4. Self-Sufficiency Programs

CSD: Summary of Recommendations

Recommendation & Benchmark	Timeline & Action Steps	Positions or Units Responsible
Workforce: Concrete Resources Recommendation: Create and resource a cross-functional, cross-organizational strategic initiative for Workforce Retention and Enhancement (Workforce Initiative) with responsibility for planning and implementing specified workforce recommendations.	Action Steps: <ul style="list-style-type: none"> • Establish and resource the Workforce Initiative • Task the newly-formed Strategic Initiatives Unit with implementation. • Determine how to obtain input from social workers, supervisors, CSD leadership, and HR to support the Workforce Initiative in implementing Workforce recommendations 	Responsible: DPSS HR; CSD leadership; Strategic Initiatives Unit

(e.g., serve on sub-teams, engage in targeted consultation).

Recommendation:
Increase compensation for social workers and supervisors across positions.

Benchmark: Annual cost of living for Riverside County, as calculated by the MIT Living Wage Calculator.

Action Steps:

- Compare current salaries for all CSD positions to cost of living and wages for similar positions in surrounding large counties, including Los Angeles, San Bernardino, San Diego, and Imperial Counties.
- Identify a time period for achieving parity and associated percentage increases to reach this goal.
- Share salary increase structure with staff and provide benchmark updates.
- Institute cost-of-living-adjustments across positions.

Responsible:
DPSS HR; Workforce Initiative

Recommendation:
Reduce employee contribution and increase employer contribution to medical and retirement benefits.

Action Steps:

- Compare employee benefit contributions to those in surrounding counties and for other public service positions such as public school teachers.

Responsible:
DPSS HR; Workforce Initiative

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Benchmark: *Benchmark to be identified based on feasibility assessment.*

- Identify reductions in employee benefit contributions and secure necessary funding.

Recommendation:
Set caseload limits for all units.

Action Steps:

- Identify positions with the largest gap between current average caseload and SB 2030 minimum caseload standards.

Responsible:

CSD leadership with input from social workers; CQI Unit; Workforce Initiative

Benchmark: *Initially, SB 2030 minimum caseload standards, with the goal of reaching SB 2030 optimum standards.*

- For identified positions, review the caseload process to assess areas for increased efficiency, as well as possible needs for additional staffing to meet benchmarks.
- Create and recruit for a back-up unit of retired, on-call social workers to mobilize during surges or staff shortages.

Recommendation:
Increase clerical support for social workers.

Action Steps:

- Collaborate with social workers to identify tasks which could be taken on by dedicated clerks.

Responsible:

DPSS HR; CSD leadership, with input from social workers; Workforce Initiative, FFA contractors

Benchmarks: *Reduced hours worked per case; reduced social worker stress and burnout, as determined by feedback surveys.*

- Review feasibility of hiring additional clerical staff, either as direct hires or as part of CSD's FFA contracts.
- Identify and provide necessary training for clerks and identify dedicated supervision for

- clerical staff so training does not fall to social workers.
- Gather quarterly feedback from social workers on effectiveness of clerical staff and the impact on their workload. This feedback should be used by supervisors as a key element of performance reviews for clerical staff.

Recommendation:
Improve hiring practices to reduce vacancies and workload.

Benchmarks: Increased offer acceptance rate; reduced vacancy rate; increased retention rate, decreased onboarding time.

Action Steps:

- A sub-team of the Workforce Initiative team should define the core competencies, responsibilities, and education needed for key positions.
- Review job qualifications and posting language to ensure they match core competencies.
- Develop and institute a pre-screening process. Assess effectiveness based on offer acceptance and retention rates for pre-screened staff compared to non-prescreened staff.

Responsible:

DPSS HR; CSD leadership; Workforce Initiative

Workforce: Positive Organizational Culture

Recommendation:
Address critical incidents as system-wide learning opportunities.

Action Step:

- Develop protocol to engage all staff and community partner agencies involved in a critical incident to conduct a thorough practice and policy review. In addition to extreme and rare instances of egregious child maltreatment and/or death, adoption dissolutions should be considered critical incidents.
- Write briefing documents following critical incidents to share lessons learned with all staff, and CSD stakeholders, noting system-level areas in need of improvement.

Responsible:
DPSS; CSD; CQI Unit

Recommendation:
Develop a peer support program for critical incidents and overall employee well-being.

Action Step:

- A sub-team of the Workforce Initiative should design the peer support group, including level of support provided, and a funding source.

Responsible:
DPSS HR; CSD leadership; CQI Unit; Workforce Initiative; social workers

Benchmarks: *Increased social worker retention; reduced number of critical incidents per year; reduced stress and increased job satisfaction,*

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

as determined through annual employee surveys.

Recommendation:

Increase team-building events for all staff.

Action Steps:

- Identify a current position or team that can be responsible for remote and in-person team-building events.
- Establish a new position if needed.

Responsible:

DPSS HR; CSD leadership; Workforce Initiative

Benchmarks: Increased retention across positions; increased job satisfaction, as determined through annual employee surveys.

Recommendation:

Highlight staff accomplishments on an ongoing basis.

Action Steps:

- Create and regularly use online appreciation platforms while staff work remotely to celebrate excellence and work anniversaries.
- Provide monthly awards to recognize employees doing excellent work.
- Honor key work anniversaries including years 1, 2, 3, 5, 10, 15, and additional increments of 5 years thereafter.
- Incorporate appreciation and recognition at every all-staff or all-hands meeting.

Responsible:

DPSS HR; CSD leadership; newly-identified position/team cited above; Workforce Initiative

Benchmarks: Increased retention across positions; increased job satisfaction, as determined through annual employee surveys.

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Participate in community events to improve public perception of CSD.

Action Steps:

- Create and staff a Communications team for CSD.
- Identify relevant community events and media contacts.
- Develop a communications package with key talking points and success stories.
- Assign events and media opportunities to leadership and communications teams.

Responsible:
Communications team; CSD leadership

Benchmarks: *Increased retention across positions; reduced stress and increased job satisfaction, as determined through annual employee surveys.*

Workforce: Support

Recommendation:
Increase support for new social workers through mentorship.

Action Steps:

- A sub-team of the Workforce Initiative should assess feasibility and structure of a mentorship model, building on CSD's previous program.
- Compensate mentors.
- Gather feedback within the first three months and during annual employee surveys.

Responsible:
Workforce Initiative; peer support workgroup; CSD leadership

Benchmarks: *Increased retention for both incoming and seasoned social workers; increased job satisfaction, as determined through annual employee surveys.*

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Establish an Office of Staff Health and Wellness.

Action Steps:

- A sub-team of the Workforce Initiative should assess feasibility of establishing such a team or office.
- Gather social worker input on Office structure and services.
- Identify necessary funding.
- Gather feedback within the first three months and during annual employee surveys.

Responsible:

Workforce Initiative; DPSS HR; CSD leadership

Benchmarks: Increased retention across positions; reduced stress and increased job satisfaction, as determined through annual employee surveys.

Workforce: Training and Advancement

Recommendation:
Tailor employee training to core competencies and increase field training.

Action Steps:

- A sub-team of the Workforce Initiative should review training modules and recommend improvements based on core competencies and employee feedback.
- Implement changes and gather continuous feedback to assess the need for further refinement.
- Conduct outreach to local universities to explore partnerships.

Responsible:

DPSS HR; Workforce Initiative; Training workgroup

Benchmarks: Increased field hours for new hires; increased retention of new hires within their first six and 12 months; reduced workload for supervisory staff, as determined in annual employee surveys.

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Resume in-person induction for new social workers.

Action Step:

- Review feasibility of increasing in-person induction hours and implement accordingly.

Responsible:
DPSS HR; Training Workgroup

Benchmarks: Increased retention of new hires within their first six and 12 months; reduced workload for supervisory staff, as determined in annual employee surveys.

Recommendation:
Provide bi-annual training on foundational skills.

Action Step:

- A sub-team of the Workforce Initiative should identify topics for inclusion in bi-annual training.

Responsible:
Training Workgroup

Benchmarks: Increased retention for all positions receiving increased training; reduced workload for supervisory staff.

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Incentivize higher education and professional development by offering an increased pay differential for staff with advanced degrees and/or licenses.

Action Step:

- Review feasibility of providing pay differentials based on what is offered in surrounding counties or in other departments.

Responsible:
DPSS HR; Workforce Initiative

Benchmarks: Increased number of new hires with advanced degrees/licenses; increased retention for staff with advanced degrees/licenses

Placements for Children: Kinship Care

Recommendation:
Create and resource a cross-functional, cross-organizational strategic initiative for placements (Placement Initiative) with responsibility for planning and implementing placement recommendations.

Action Steps:

- Establish and resource the Placement Initiative.
- Task the Strategic Initiatives Unit with implementation.
- Determine how to obtain input and support from CSD leadership, social workers, selected FFA leaders, faith leaders, other

Responsible:
Committee on Inter-Departmental Systems Improvement; Strategic Initiatives Unit

Recommendation & Benchmark	Timeline & Action Steps	Positions or Units Responsible
<p>Benchmarks: Lower rate of maltreatment in care, increased percent of siblings placed together, increased rates of children being placed near their community of origin, increased placement stability.</p>	<p>community-based organizations, and media representatives to help implement placement recommendations (e.g., serve on sub-teams, engage in targeted consultation, lead specific campaigns).</p>	
<p>Recommendation: Make better use of family finding efforts to identify viable kinship or NREFM (non-related extended family member) placements when children are placed in out-of-home care.</p> <p>Benchmarks: Increased rate of children in kinship care.</p>	<p>Action Step:</p> <ul style="list-style-type: none"> Engage the National Institute for Permanent Family Connectedness for additional training and support relating to family finding and family engagement. 	<p>Responsible: CSD leadership; Placement Initiative</p>
<p>Recommendation: Use CFTs strategically to identify family members who might serve as a placement or other resource.</p>	<p>Action Step:</p> <ul style="list-style-type: none"> Mandate that there be a family finding representative on every CFT. 	<p>Responsible: CSD leadership; Placement Initiative</p>

Benchmarks: *Increased rate of children in kinship care.*

Recommendation: **Develop policies and support initiatives to strengthen and increase kin placements.**

Action Steps:

- Kinship placement supervisors should regularly assess and track barriers to kinship placements for family members who they identify as potential caregivers.
- Institute quarterly meetings with kinship placement supervisors and their managers to review and resolve placement barriers.

Responsible:

CSD leadership; Placement Initiative

Benchmarks: *Increased placement stability for children in kinship care placements. Decreased rates of maltreatment for children in kinship care.*

Recommendation:

Make greater use of hybrid, in-person, and remote access to CFTMs.

Action Steps:

- Develop a written plan to resume in-person CFTMs.
- Assign staff to ensure that in-person meetings have basic technology capacity to support remote access for family members unable to attend in person.

Responsible:

CSD leadership

Placements for Children: Foster Care

Recommendation:
Launch a county-wide effort to substantially increase the number of highly-effective foster homes available to care for children.

Benchmark: Detailed county-wide plan to the Board of Supervisors.

Action Steps:

- A sub-team of the Placement Initiative should create a county-wide plan.
- The sub-team should identify specific partners to lead workstreams (e.g., media campaign pilots for highly-targeted recruitment efforts).

Responsible:

Committee on Inter-Departmental Systems Improvement; Placement Initiative

Recommendation:
Appoint an ombudsperson to process feedback about FFA-county partnerships.

Action Steps:

- Consult with the California State Ombudsperson for guidance on setting up this role at the county level.
- Determine the entity to sponsor and house this position that will promote neutrality.
- Develop an ombudsperson position, communicate its scope of practice, and provide outreach to all CSD and FFA providers about access points.
- Assess the value of this staff position within one year of appointment and determine the

Responsible:

County leadership; Appointed Counsel; CSD leadership; California State Ombudsperson as liaison and advisor in establishing local role

need for additional ombudspersons or support for this position.

Recommendation:
Increase County oversight of Foster Family Agencies (FFAs).

Benchmarks:
*Reduced critical incidents;
 increased placement stability;
 fewer children who abscond from placement; fewer maltreatment reports for children in care.*

Action Steps

- Review mechanisms for increased verification of FFA safety and performance described in this report to determine the most effective strategies.
- Review lessons learned from past critical incidents and identify additional safety protocols needed.
- Modify FFA contracts to require continuous access to FFA social worker notes, visit logs, and service logs.
- Engage a contractor such as Implementix to develop audit protocols for FFAs when one or more critical incidents occur.

Responsible:

CSD Leadership; CQI Unit; Contracts Unit

Recommendation:
Launch several region-specific pilots in partnership with selected FFAs to increase the census of foster parents.

Action Step:

- Use the RFP process to select 3–5 FFAs to develop new, targeted recruitment initiatives, including enhanced funding for recruitment efforts.

Responsible:

CSD leadership; Strategic Initiatives Unit/Placement Initiative

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Develop targeted, intensive efforts to improve the quality of care that kin and non-kin foster parents provide.

Action Steps:

- Develop a plan for a quality-improvement initiative county-wide.
- Start the roll-out with a small group of selected FFAs, using a train-the-trainer model to expand the initiative.
- Engage the California Alliance for Child and Family Services in developing best practice models for FFA contracting to build incentives for high-quality caregiving.

Responsible:
CSD leadership; Strategic Initiatives Unit/Placement Initiative

Recommendation:
Implement KEEP training for all resource parents.

Action Steps:

- Engage the services of KEEP model trainers.
- Dedicate resources to staff the KEEP coaching model with kinship caregivers.
- Build incentives into FFA contracts for agencies utilizing the KEEP model.

Responsible:
CSD leadership; contracts managers; FFA leaders; Strategic Initiatives Unit/Placement Initiative

Recommendation:
Fully implement and elevate Riverside County's Quality Parenting Initiative (QPI) model.

Action Steps:

- Target QPI training to kinship foster parents, since these caregivers fall under the jurisdiction of CSD.
- Examine the relevance of CSD's QPI staffing in relation to FFA providers, and

Responsible:
CSD leadership; Strategic Initiatives Unit/Placement Initiative

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

- consider focusing QPI resources only on kinship caregivers.
- Work with Binti or another firm to develop a ready inventory of all active resource parents serving Riverside County so that CSD can communicate initiatives such as QPI directly to the caregiver community.

Recommendation:
Develop a Foster Parent Retention Plan, with a focus on retaining highly effective resource parents.

Action Step:

- A sub-team of the Placement Initiative should work with selected FFA providers and relevant community partners to develop a plan to effectively address retention issues.

Responsible:

CSD leadership; Strategic Initiatives Unit/Placement Initiative

Recommendation:
Consider providing additional financial support to resource families to improve retention.

Action Steps:

- Create a pilot initiative with 3–5 select FFAs to increase the financial subsidy offered to resource parents.
- Contract with a local university or evaluation firm to study the impacts.

Responsible:

CSD leadership; Strategic Initiatives Unit/Placement Initiative

Recommendation & Benchmark	Timeline & Action Steps	Positions or Units Responsible
<p>Recommendation: Develop a receiving center or home for short-term transitional stays for children awaiting placement.</p>	<p>Action Steps:</p> <ul style="list-style-type: none"> • Expedite the development of a receiving center with a selected FFA provider. • Study best practices for receiving centers locally and nationally. 	<p>Responsible: CSD leadership; Strategic Initiatives Unit</p>
<p>Recommendation: Standardize professional norms.</p>	<p>Action Steps:</p> <ul style="list-style-type: none"> • Develop written policies regarding workplace professional norms. • Include these professional norms in in-service training for staff and supervisors. 	<p>Responsible: CSD leadership; training workgroup</p>
<p>Recommendation: Institute feedback mechanisms to regularly elicit information from clients about the services they receive.</p>	<p>Action Steps:</p> <ul style="list-style-type: none"> • Develop a strategy (e.g., QR code) for collecting feedback from constituent groups with whom CSD interacts. • Develop a plan for collecting, analyzing, and acting upon community feedback. 	<p>Responsible: Strategic Initiatives Unit; CQI Unit</p>
<p>Placements for Special Populations</p>		
<p>Recommendation: Assess the newly-developed professional parent model</p>	<p>Action Step:</p> <ul style="list-style-type: none"> • Contract with a local university or evaluation firm to study the relative 	<p>Responsible: CSD leadership</p>

Recommendation & Benchmark	Timeline & Action Steps	Positions or Units Responsible
<p>(Short-term Residential Treatment Program of 1) and determine if it should be expanded to serve additional children.</p>	<p>outcomes and costs/benefits associated with the new model.</p>	
<p>Recommendation: Create financial or other incentives for FFAs to develop STRTPs with unconditional care policies.</p>	<p>Action Steps:</p> <ul style="list-style-type: none"> • Identify a small group of FFA providers who show an interest in developing an unconditional care continuum of services model. • Work with the California Alliance of Child and Family Services to identify existing California FFAs incorporating an unconditional care philosophy and establish a training opportunity for selected Riverside FFAs. • Evaluate the effectiveness of the expansion of the model. 	<p>Responsible: CSD leadership; Contracts Unit</p>
<p>Recommendation: Explore an organizational partnership with Think of Us.</p>	<p>Action Steps:</p> <ul style="list-style-type: none"> • Engage with Think of Us, or a similar partner, to guide the implementation of TAY recommendations below. 	<p>Responsible: CSD leadership; Strategic Initiatives Unit; Contracts Unit</p>

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Create and resource a cross-functional, cross-organizational strategic initiative for services for TAY-a TAY Initiative-with responsibility for planning and implementing related recommendations.

Action Step:

- Establish and resource a TAY Initiative.
- Task the Strategic Initiatives Unit with implementation.

Responsible:

CSD leadership; Strategic Initiatives Unit

Recommendation:
Seek input from teens and young adults on effective ways to support them.

Action Step:

- Establish a funded county Youth Commission to provide input on the TAY recommendations in this report and supplement with areas of concern and ideas for improvement.

Responsible:

CSD leadership; Tay Initiative

Recommendation:
Increase opportunities to pair TAY with a young adult mentor with experience in foster care.

Action Step:

- Examine whether expansion of the Youth Partner program is feasible and implement if so.

Responsible:

CSD leadership; TAY Initiative

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Recruit young adults with experience in foster care for TAY-related roles in the CSD.

Action Step:

- Review all of the regions, units, and roles in CSD to determine if any positions might be appropriate for targeted staff recruitment among TAY former clients.

Responsible:

DPSS HR; CSD leadership; Contracts Unit; TAY Initiative

Recommendation:
Create a TAY Navigation Team within the Youth and Community Services Region.

Action Step:

- Work with HR to develop new TAY navigation positions within the Youth and Community Services Region.

Responsible:

CSD leadership; TAY Initiative

Recommendation:
Verify the obtaining of vital identification documents and track performance.

Action Steps:

- Identify a single point of accountability for obtaining clients' vital identification documents.
- Communicate these expectations widely to staff, FFAs, and other CSD partners.
- Require photographic verification that documents have been obtained.
- Track what percentage of children in care have their identification documents at six months after entering care, at age 15.5, and at 18th birthday milestones.

Responsible:

CSD leadership; TAY Initiatives; Appointed Counsel; IT Unit; Contracts Unit; FFAs

Benchmarks: Track and ensure that 95% of young adults in care and leaving care have vital identification documents.

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Provide young adults with tools to retain their vital documents.

Action Steps:

- Modify protocols to require social workers for youth to assist young people with creating a free iFoster membership and to upload their vital documents to the digital locker smartphone app.
- Include a brief module on iFoster's free services, including the digital locker, in-staff training and during Independent Living Program (ILP) training.

Responsible:

CSD leadership; IT Unit; TAY Initiative; Training Unit

Recommendation:
Develop and use teen-friendly channels of communication with TAY.

Action Steps:

- Explore an organizational partnership with Think of Us to connect youth with their virtual support services.
- Contract with a social media expert to develop and regularly update a social media platform that is TAY-friendly, that includes relevant and timely information and resources, and that is connected to services, supports, and information both within and outside of CSD.
- Update the DPSS website to include TAY-specific information in TAY-responsive language.

Responsible:

CSD leadership; IT unit; TAY Initiative

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

- Redesign DPSS website for improved navigation.

Recommendation:
Increase texting options to communicate with TAY about youth services, including peer support.

Action Step:

- Collaborate with County Counsel and minors' counsel to determine when and what types of information can be shared via text.

Responsible:

CSD leadership; County Counsel; Appointed Counsel

Recommendation:
Increase promotion of the Independent Living Program.

Action Step:

- Revise the current contract with the county's ILP provider to include provisions for outreach using social media and other methods.

Responsible:

CSD leadership; TAY Initiative

Recommendation:
Collect contact information for youth exiting the system to support reconnection.

Action Step:

- Work with IT staff to modify internal systems and protocols to collect email and alternate contact details for youth exiting care who may wish to return to care to become Non-Minor Dependents (NMDs).

Responsible:

CSD leadership; Tay Initiative; IT manager

Services to Children and Families

Recommendation:
Review data on service availability by region within the County and assess opportunities for service expansion.

Action Step:

- Leverage the Asset Mapping effort to collect and analyze data on service availability, particularly for high-need services such as domestic violence, mental health, substance abuse, income & employment, housing, and carceral re-entry programs.

Responsible:

Committee on Inter-Departmental Systems Improvement

Recommendation:
Identify opportunities for expanded access to transportation for clients living in remote areas of the county.

Action Step:

- Engage rideshare companies (e.g., Lyft & Uber) to determine opportunities for reduced-cost transportation services for child-welfare-involved families.
- Consider the feasibility of extending Los Angeles County's child and youth transportation service, Hop, Skip, Drive for implementation in Riverside County (www.hopskipdrive.com).

Responsible:

CSD leadership; Contract Unit; Strategic Initiatives Unit

Recommendation & Benchmark	Timeline & Action Steps	Positions or Units Responsible
<p>Recommendation: Continue to build on the already established peer mentor model to make mentoring services more widely available to parents.</p>	<p>Action Step:</p> <ul style="list-style-type: none"> Contact staff associated with the Contra Costa Parent Partner program to examine replication opportunities, including models of staff supervision. 	<p>Responsible: CSD leadership; Strategic Initiatives Unit</p>
<p>Court Services</p>		
<p>Recommendation: Include a requirement in CSD contracts that directs service providers to share completion reports and activity logs with the County and Appointed Counsel.</p>	<p>Action Step:</p> <ul style="list-style-type: none"> Add new contract language to community providers to require regular communication with CSD social workers and juvenile court attorneys about client progress and completion activities. 	<p>Responsible: CSD leadership; Juvenile Court leadership, Contracts Unit, IT Unit</p>
<p>Recommendation: Track and publicize court report completion rates.</p>	<p>Action Step:</p> <ul style="list-style-type: none"> Court staff should develop simple case counts and summarize monthly. 	<p>Responsible: Juvenile Court leadership</p>

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Expand the role of County Counsel during this period of staffing shortages to support the development of timely court reports.

Action Step:

- County counsel staff be made available for office hours and other one-on-one support to aid social workers in developing court reports.

Responsible:
County Counsel

Recommendation:
Resume in-person court activities for social workers on a selective basis.

Action Step:

- Engage supervisors in selecting client cases appropriate for a social workers' in-person court presence on a limited basis.

Responsible:
CSD; County Counsel

Recommendation:
Expand partnership with the CASA program.

Action Steps:

- Engage communications staff in featuring CASA on the revamped DPSS website.
- Ensure a CASA representative is included in county-wide efforts to recruit highly effective foster parents.

Responsible:
CSD leadership; CASA E.D.; Juvenile Court; Appointed Counsel

**Recommendation &
Benchmark**

Timeline & Action Steps

Positions or Units Responsible

Recommendation:
Create courtroom and attorney-level access to the new Comprehensive Child Welfare Information System (CCWIS).

Action Step:

- Implement two-way (bi-directional) data exchange between the agency and the court.
- Identify Appointed Counsel representative to assist in system design approval

Responsible:

CSD leadership; Appointed Counsel; Juvenile Court; IT Unit

OPG: Summary of Recommendations

Recommendation & Benchmark	Timeline & Action Steps	Positions or Units Responsible
<p>Recommendation: Increase number of deputy public guardians and decrease caseloads.</p> <p>Benchmarks: <i>Reduced caseloads to 1:60 or less; reduced and maintained caseloads at a maximum ratio of 1:30 within two years.</i></p>	<p>Action Steps:</p> <ul style="list-style-type: none"> • Fill vacant deputy public guardian positions. • Work through CA PA/PG/PC to secure state funds for additional positions. • Explore specific grant funding in collaboration with other agencies. • Track cost savings of public guardianship functions for the county and state; use this information to advocate for additional funding for staff. 	<p>Responsible: Board of Supervisors; RUHS/BH leadership; OPG leadership</p>
<p>Recommendation: Increase support for deputy public guardians.</p> <p>Benchmark: <i>Reduced turnover of deputy public guardians.</i></p>	<p>Action Steps:</p> <ul style="list-style-type: none"> • Explore scenarios of unsafe field environments and develop a plan of protection. • Develop, contract for, and incentivize curricula concerning best practices through OPG supervisors, RUHS/BH staff, DPSS and other county agencies, CA PA/PG/PC, and National Guardianship Association. • Purchase necessary technology for deputy public guardians, including equipment for use in the field. 	<p>Responsible: Board of Supervisors; RUHS/BH leadership; OPG leadership; RUHS/BH and OPG HR</p>

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

- Allocate funds for increased administrative support for deputy public guardians.
- Review and develop policies for remote work for functions without client interface.
- Increase flexibility of work hours.
- Convene a facilitated working group on reducing deputy public guardians' stress.
- Develop protocols for supervisors to periodically receive feedback from deputies.

Recommendation:
Improve OPG collaboration with other agencies.

Benchmark: Increased use of Self-Sufficiency benefits by OPG clients.

Action Steps:

- Include OPG in County Service Integration planning meetings.
- Establish meetings with DPSS agencies, CalFresh, Medi-Cal, CalWORKS, Office on Aging, and housing agencies to develop working agreements.
- Designate liaisons with these agencies to fast track services.

Responsible:

Inter-departmental executive steering committee for Service Integration; RUHS/BH leadership; OPG leadership; County Counsel; DPSS leadership; leadership of housing agencies

Recommendation:
Implement means of OPG external review and outreach.

Action Steps:

- Convene a workgroup to develop OPG-specific complaint processes and means of publicizing the process.
- Contract for a redesign of the website within county guidelines.

Responsible:

RUHS/BH leadership; OPG leadership; County Counsel

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

Benchmark: *Increased awareness of how to make a complaint using the complaints process, as measured by client interviews; number of website hits; percentage of audit findings resolved.*

- Contract for or designate staff to produce a succinct, accessible, and informative OPG annual report.
- Identify an independent performance audit entity and contract for review.
- Identify staff and/or an outside entity to develop a plan for a continuous quality improvement protocol.
- Identify 8–10 experts from different disciplines in the county to serve on an advisory committee, staff the committee, and determine meeting protocols and means of committee input.

Recommendation:
Implement channels to strengthen client voice in OPG decision-making.

Action Steps:

- Convene a workgroup of staff and experts or use the advisory committee to develop a guide for staff on client-centered practice and client rights.
- Train staff on the client-centered practice guide.
- Convene a workgroup of staff and experts or use the advisory committee to develop an OPG client satisfaction survey.

Responsible:

OPG leadership; County Counsel; Appointed Counsel

- Implement the client satisfaction survey; provide any needed support to clients in responding.

Recommendation:
Expand use of client residential settings.

Benchmark: Increased Number and percent of clients living in their own home, in affordable apartments, in small board and care or assisted living settings, and in nursing homes.

Action Steps:

- Convene a workgroup of staff, experts and/or advisory committee members to develop policies and procedures for community-based placements.
- Train staff on policies and procedures.
- Meet with housing agencies and programs to develop OPG agreements and liaisons.
- Meet with the long-term care ombudsman program concerning referral protocols.

Responsible:
leadership; OPG leadership; Housing agencies

Appointed Counsel: Summary of Recommendations

Recommendation & Benchmark	Timeline & Action Steps	Positions or Units Responsible
<p>Recommendation: Reduce juvenile dependency counsel caseloads.</p> <p>Caseloads for court appointed dependency counsel should be reduced such that caseloads should never exceed the 141/188 threshold per attorney.</p> <p><i>Benchmark: Cases per court-appointed dependency counsel below the 141/188 threshold.</i></p>	<p>Action Step:</p> <ul style="list-style-type: none"> Monitor court-appointed dependency counsel's caseloads and contract with additional attorneys as needed to ensure caseloads do not exceed the 141/188 threshold. 	<p>Responsible: Superior Court, in consultation with Appointed Counsel</p>
<p>Recommendation: Ensure payment on each juvenile dependency appointment.</p> <p>Currently, the contracts require that appointed counsel submit an invoice for a predetermined number of</p>	<p>Action Steps:</p> <ul style="list-style-type: none"> Amend current contract to permit monthly invoices for actual number of appointments. Include similar provision in future contracts. 	<p>Responsible: Superior Court, in consultation with Appointed Counsel</p>

Recommendation & Benchmark

Timeline & Action Steps

Positions or Units Responsible

appointments with a quarterly reconciliation system. The contract should be revised to allow appointed counsel to submit invoices for the actual number of appointments each month.

Benchmark: Completion of new or amended contract.

Recommendation:

Conduct flat-fee compensation analyses.

The County should conduct studies to ensure that the negotiated flat-fee rates are adequate for the attorneys' practice, accounting for overhead and other costs borne by private professionals and, in the case of juvenile appointments, that at a minimum, compensation is equal to county or child welfare agency attorneys' compensation.

Action Steps:

- Conduct studies to evaluate current rates provided to counsel providing representation in juvenile dependency, conservatorship, and guardianship proceedings.
- Amend the contracts to compensate court-appointed counsel according to the studies.
- Ensure any future flat-fee contract reflects the findings of these studies.

Responsible:

Superior Court; Board of Supervisors, in consultation with Appointed Counsel

Benchmark: *Completion of flat-fee compensation analyses.*

Recommendation:
Add an extraordinary case fee provision to the contract for representation in probate court.

Benchmark: *Revised contract for Designated Firm includes extraordinary case fee provision.*

Action Steps:

- Negotiate with the Designated Firm to amend the current contract to include a provision for additional compensation in extraordinary cases.
- Ensure that any future flat-fee contract includes a provision for additional compensation in extraordinary cases.

Responsible:

Board of Supervisors, in consultation with Appointed Counsel

Recommendation:

Consider the feasibility of hourly rate compensation structures.

Consider modifying the contracts with appointed counsel and the Designated Firm to compensate on an hourly basis instead of on a per-case basis.

Action Step:

- Evaluate the feasibility of hourly rate structures.

Responsible:

Superior Court; Board of Supervisors, in consultation with Appointed Counsel

Recommendation:
Implement feedback systems that capture clients' voices.

Create formal client feedback systems to make sure that clients are given the opportunity to voice their needs and concerns to their counsel on a regular basis.

Benchmark: Created client feedback systems.

Action Step:

- Create formal client feedback systems (i.e., periodic surveys, client check-ins, and client exit interviews) to make sure that clients are given the opportunity to voice their needs and concerns on a regular basis.

Responsible:

Appointed counsel

Recommendation:

Determine and set caseload for caseload of conservatorship and guardianship proceedings.

Impose a cap on attorney caseloads in guardianship and conservatorship cases.

Benchmarks: Established ceiling for caseloads per attorney, completed new or amended contract which

Action Steps:

- Work with the Designated Firm and other experts to determine the appropriate caseload ceiling for a caseload of conservatorship and guardianship proceedings.
- Modify the contract with the Designated Firm to ensure that no attorney has a caseload higher than the determined threshold.
- Once set, include caseload ceilings in future contracts.

Responsible:

Board of Supervisors, in consultation with Appointed Counsel

**Recommendation &
Benchmark**

Timeline & Action Steps

Positions or Units Responsible

ensures caseloads fall below the determined threshold.

**Recommendation:
Create an informational
document for conservatorship
and guardianship proceedings.**

*Benchmark: Created informational
summary document describing roles
and responsibilities.*

Action Step:

- Create an informational document that summarizes the various roles and responsibilities of professionals involved in conservatorships and guardianships.

Responsible:

OPG leadership; Superior Court;
County Counsel; Appointed Counsel

Self-Sufficiency Programs: Summary of Recommendations

Recommendation & Benchmark	Timeline & Action Steps	Positions or Units Responsible
<p>Recommendation: Leverage the county-wide Integrated Health and Human Services Delivery System effort to streamline data sharing protocols and practices between DPSS internal programs.</p>	<p>Action Steps:</p> <ul style="list-style-type: none"> Identify a plan to prioritize training and supporting staff in accessing and interpreting new information that will become available through increased data sharing. Maximize opportunities to share de-identified data for large-scale analytics and targeted outreach. Create protocols for documenting the legal basis for each step of the data sharing. A knowledge base of these rationales will support continuity, especially when turnover is high. Develop and articulate an umbrella approach that avoids the need to reinvent sharing agreements. 	<p>Responsible: DPSS leadership</p>
<p>Recommendation: Create a plan, as part of the Integrated Health and Human Services Delivery System effort, to improve screening, referral, and enrollment systems to</p>	<p>Action Steps: Develop implementation plans for:</p> <ul style="list-style-type: none"> Investing in automated screening tools to support integrated enrollment and agency-wide protocols for DPSS staff to 	<p>Responsible: DPSS leadership; OPG leadership</p>

ensure that all clients are systematically connected to the full suite of supportive services that they may need, regardless of whether DPSS, other county departments, or community-based service providers administer those services.

systematically connect clients to referral hubs.

- Ramping up ongoing communication with clients about additional services.
- Expanding the use of multi-disciplinary teams between DPSS programs and across the county to better assess needs and provide holistic support for clients.

Recommendation:

Strengthen messaging to clients to ensure that they can maximize the benefits from Self-Sufficiency programs.

Action Steps:

- Develop multilingual materials, along with text and email follow-up messaging, on ways to use and maximize benefits.

Responsible:

DPSS leadership

Benchmarks: Increased client knowledge of ways to maximize benefits; increased engagement with health care providers among Medi-Cal clients.

Identify distribution times for physical materials and digital follow-up messages.

- Monitor uptake rates for promoted services.
- Create a plan to systematically promote the availability of health care navigators to ensure that Medi-Cal clients get actual health care and not just insurance.
- Systematically include guidance on how to stretch CalFresh benefits.

Recommendation:
Streamline enrollment experiences to ensure that more eligible clients, especially those experiencing high stress and instability, get approved for benefits.

Benchmarks: *Increased BenefitsCal portal and text messaging opt-in rates to at least 80%; decreased percentage of applications denied due to procedural reasons to at least the rates of the closest peer county.*

Action Steps:

- Conduct an analysis of current enrollments and procedural denials for Self-Sufficiency programs for low-income adults associated with recent APS, CSD, and OPG cases.
- Review existing benefits access and enrollment experiences from a client-centered, trauma-informed approach, potentially engaging a client-centered design consultant for support. Include ongoing feedback structures and plans for testing possible improvements.
- Create additional liaisons, including dedicated eligibility specialists, to support Adult Services, CSD, and OPG social workers with streamlined interviewing and verification processes. This should include a focus on CalFresh applications for NMDs and youth under the care of CSD who lack food access.
- Increase the usage (opt-in rate) and impact of text and email campaigns that let people know what the next steps are in the enrollment and benefits access process before it is too late. Reminder messages for key enrollment processes (e.g., interviews,

Responsible:

DPSS leadership

**Recommendation &
Benchmark**

Timeline & Action Steps

Positions or Units Responsible

- verification document uploads) should use industry best practices with regard to messaging and timing.
- Experiment with strategies for reducing CalFresh denials due to missed verifications.

Turpin children

10:24

Riverside County Board of Supervisors Request to Speak

Submit request to Clerk of Board (right of podium), Speakers are entitled to three (3) minutes, subject to Board Rules listed on the reverse side of this form.

SPEAKER'S NAME: Jacki McCray

Address: 17265 Gardner Ave

City: Rio Zip: 92504

Phone #: 951-237-2077 3,360

Date: 7-12-22 Agenda # DPSS

PLEASE STATE YOUR POSITION BELOW:

Position on "Regular" (non-appealed) Agenda Item:

 Support Oppose Neutral

Note: If you are here for an agenda item that is filed for "Appeal", please state separately your position on the appeal below:

 Support Oppose Neutral

I give my 3 minutes to: _____

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You may request to be heard on a published agenda item. Requests to be heard must be submitted to the Clerk of the Board before the scheduled meeting time.

Requests to Address Board on items that are "NOT" on the Agenda/Public Comment:

Notwithstanding any other provisions of these rules, a member of the public shall have the right to address the Board during the mid-morning "Oral Communications" segment of the published agenda. Said purpose for address must pertain to issues which are under the direct jurisdiction of the Board of Supervisors. YOUR TIME WILL BE LIMITED TO THREE (3) MINUTES. Donated time is not permitted during Public Comment.

Power Point Presentations/Printed Material:

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12:02

Riverside County Board of Supervisors Request to Speak

Submit request to Clerk of Board (right of podium), Speakers are entitled to three (3) minutes, subject to Board Rules listed on the reverse side of this form.

SPEAKER'S NAME: Ray Buckner

Address: _____

City: _____ Zip: _____

Phone #: _____

Date: _____ Agenda # 3:36

PLEASE STATE YOUR POSITION BELOW:

Position on "Regular" (non-appealed) Agenda Item:

_____ Support _____ Oppose _____ Neutral

Note: If you are here for an agenda item that is filed for "Appeal", please state separately your position on the appeal below:

_____ Support _____ Oppose _____ Neutral

I give my 3 minutes to: _____

BOARD RULES

Requests to Address Board on "Agenda" Items:

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12:06

Riverside County Board of Supervisors Request to Speak

Submit request to Clerk of Board (right of podium), Speakers are entitled to three (3) minutes, subject to Board Rules listed on the reverse side of this form.

SPEAKER'S NAME: Monica Mulcair

Address: 31712 Los Rios St.

City: STC Zip: 92675

Phone #: (949) 493-9999

Date: 7/12/22 Agenda # 3.36

PLEASE STATE YOUR POSITION BELOW:

Position on "Regular" (non-appealed) Agenda Item:

Support Oppose Neutral

Note: If you are here for an agenda item that is filed for "Appeal", please state separately your position on the appeal below:

Support Oppose Neutral

I give my 3 minutes to: _____

BOARD RULES

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Request Vehicles be removed
Support Staff

1:18

**Riverside County Board of Supervisors
Request to Speak**

Submit request to Clerk of Board (right of podium), Speakers are entitled to three (3) minutes, subject to Board Rules listed on the reverse side of this form.

SPEAKER'S NAME: Cathie Wilde

Address: 907 Ridge Heights Dr.

City: Fallbrook Zip: 92028

Phone #: 520 250 6969

Date: 7/12/22 Agenda # 18327 / 19.1

PLEASE STATE YOUR POSITION BELOW:

Position on "Regular" (non-appealed) Agenda Item:

 Support Oppose Neutral

Note: If you are here for an agenda item that is filed for "Appeal", please state separately your position on the appeal below:

 Support ✓ Oppose Neutral

I give my 3 minutes to: _____

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