



## CLASS SPECIFICATION

Class Code: 60000190  
Date Established: 07/1999  
Last Reviewed: 04/2024  
Last Revised: 04/2024  
Last Title Change:  
FLSA: exempt  
Probation: 12 months

### SUPERVISING GUARDIAN CASE MANAGER

#### **DEFINITION**

Under direction, supervises Guardian Case Managers who manage the personal and/or financial affairs of “protected persons” under a court ordered guardianship who are no longer able to manage their own affairs due to a medical, mental, or physical disability within the guardianship laws of the state; and performs related work as required.

#### **EXPERIENCE AND TRAINING REQUIREMENTS**

A bachelor’s degree from an accredited college or university in human services, social work, criminal justice, nursing, psychology, business, or a closely related field AND four years of full-time progressively responsible experience in guardian case management to include at least two years of full-time lead or supervisory experience; OR an equivalent combination of training and experience.

#### **LICENSE OR CERTIFICATE**

A valid driver’s license is required at the time of appointment.

Certification as a National Certified Guardian at the time of appointment.

#### **SUPERVISION EXERCISED**

Exercises direct supervision over professional, technical, and clerical staff.

**EXAMPLES OF DUTIES** *(The following is used as a partial description and is not restrictive as to duties required.)*

Supervise assigned staff, which includes staff selection; assigning, scheduling, and reviewing work; providing training in proper work methods and procedures; providing professional development, coaching, and mentoring; writing performance evaluations; and implementing discipline and conflict resolution procedures when necessary

Participate in program and policy development; ensure compliance with standards, statutes, policies and procedures; participate in program evaluation and budget development; identify unmet program needs and develop programmatic recommendations.

Receive guardianship referrals from medical/legal/financial institutions, community service agencies and the general public; review information for accuracy to determine the appropriate action for each case, develop action plans for the care and treatment of protected persons.

Supervise and assist in administration of guardianships; conduct periodic reviews of the Guardian Case Manager’s ongoing investigations and case management duties.

Identify training needs; develop and conduct trainings or workshops; make training recommendations to enhance skills in case management, case planning, asset management, and surrogate decision making.

Receive guardianship draft petitions; review, update case management software and assign to case managers for investigation or case management as directed by court outcome.

Supervise, oversee, and review recommendations of case managers and make final recommendations to the Public Guardian; assign Guardian Case Manager to handle the case.

Interact with a variety of public and private legal, medical, financial, and administrative professionals regarding case specific or general guardianship matters.

Serve on task forces and committees promoting protective services.

Function as liaison officer to all agencies that work with the Public Guardian's office including care facilities, hospitals, and public and private agencies.

Supervise, oversee, and assist in inventory control and on-site investigations for the Public Guardian.

Coordinate and oversee the handling of guardianships from inception to completion and final discharge by the court.

Perform legal research on guardianship issues; review the laws and regulations as necessary.

Assist the Public Guardian with bill draft legislation as it affects the Public Guardian's office.

Assist the Public Guardian with budget administration and issues for the Public Guardian's office.

Ensure that assigned personnel perform duties and responsibilities in a safe and prudent manner that does not expose them or others to unnecessary harm or risk of on-the-job injury.

## **JOB RELATED AND ESSENTIAL QUALIFICATIONS**

**Full Performance Level** *(These may be acquired on the job and are needed to perform the work assigned.)*

### **Knowledge of:**

Department and countywide policies, practices, and procedures.

Principles and practices of comprehensive employee supervision including leadership, motivation, development, team building, conflict resolution, employee training, performance evaluation and discipline

Legal responsibilities of the Public Guardian in Washoe County.

State laws and County regulations applicable to guardianship and estate administration.

Methods and techniques involved in the management of personal finances.

Federal, state, and county benefit and entitlement programs.

Legal process to establish, modify or terminate guardianship.

Software specific to the Public Guardian's Office.

National Guardianship Standards and Ethics

Protected Person's Bill of Rights

Elements of Supported Decision Making and how to implement within a guardianship case.

Patient Care Transfer Techniques.

**Ability to:**

Select, supervise, and evaluate the performance of assigned staff.

Evaluate operations, develop, recommend, and implement operational alternatives.

Independently manage the affairs of Washoe County protected persons, meeting all relevant standards for care.

Provide direction on the most complex casework duties.

Perform duties of the Public Guardian when directed and after having been appointed as a Deputy.

**Entry Level** (*Applicants will be screened for possession of these through written, oral, performance, or other evaluation methods.*)

**Knowledge of:**

Principles and practices of employee supervision and training.

Aspects of legal guardianship and estate administration.

Asset management and fiduciary duties.

Casework preparation, principles, objectives, and practices.

Interviewing methods and techniques.

Socio-economic conditions, trends, and factors impacting protected persons.

Basic dynamics of human behavior.

Legal, medical, and psychological terminology.

Effects of mental and physical illnesses.

**Ability to:**

Analyze information, project consequences of proposed actions, formulate alternative solutions and make appropriate responses or recommendations.

Read, interpret, and apply pertinent laws, regulations, and standards, including eligibility criteria, legal/financial documents and departmental policies and procedures.

Analyze and utilize medical and psychological data.

Research information related to client referrals and document findings.

Coordinate available community resources and services to meet client needs.

Write clear, accurate and concise narrative reports.

Communicate orally in a clear, concise manner.

Maintain confidential data and information.

Safely operate a motor vehicle.

Operate a computer and a variety of software.

Understand and act upon a variety of financial and real estate documents.

Interview, counsel and interact effectively with critically ill, mentally incapacitated or dying clients, maintaining confidentiality, sensitivity, and tact in communications regarding guardian cases.

Exercise emotional control, especially under stressful situations.

Deal effectively with hostile, aggressive and abusive protected persons, family, or caregivers.

Interview and interact effectively with critically ill, mentally incapacitated or dying protected persons, maintaining confidentiality, sensitivity, integrity, and tact in communications regarding guardian cases.

Maintain effective working relationships with those contacted in the course of work including medical professionals, community agencies and the public.

**SPECIAL REQUIREMENTS** *(Essential duties require the following physical skills and work environment.)*

Ability to work outside and independently travel to various locations where protected persons reside. Ability to tolerate exposure to unsanitary, hazardous, or hostile environments. Ability to work in a professional office environment. Ability to operate office equipment including, but not limited to, computers, telephones, calculators, copiers, and fax machines.

*This class specification is used for classification, recruitment, and examination purposes. It is not to be considered a substitute for work performance standards.*