

# Market Range Detail - Fiduciary Supervisor

## Effective Date

February 1, 2016

## Market Range Title Description

### PURPOSE STATEMENT

The purpose of this position is to be responsible for the oversight and daily supervision of staff engaged in the administration of cases under guardianship, conservatorship and decedent estates.

### PRIMARY DUTIES

This job may include the following job duties and is not an all-inclusive list of all job duties that may be required. Employees will be required to perform other related duties as assigned.

- Assigns and consults with staff on cases; monitors completion of assignments and provides guidance in difficult cases to assure compliance with statutes, court orders, ethics, departmental policies and procedures.
- Monitors completion of assignments using department case tracking system.
- Consults with staff on casework, monitors case planning, reviews caseloads and makes caseload changes as necessary.
- Instructs staff on counseling techniques, concepts of human behavior and caseload management.
- Establishes and maintains standards for work performed by assigned staff.
- Responsible for supervisory activities including, but not limited to, hiring, training, and performance management.
- Prepares, reviews, analyzes and responds to legal documents, correspondence, reports and proposed legislation.
- Collects and compiles data; develops and creates a variety of monthly reports.
- Makes Court appearances, testifies at hearings and provides legal coordination of cases.
- Responsible for reviewing medical and surgical procedure requests and participates in staffings concerning wards' care.
- Conducts conferences with agencies and persons outside of Public Fiduciary such as the Superior Court, attorneys, hospitals, nursing homes and Office of Attorney General.
- Conducts staffing and interoffice conferences as well as interprets policies for Public Fiduciary cases.
- Confers with Public Fiduciary related to issues affecting Public Fiduciary cases.
- Establish, maintain, and provide ongoing education regarding the role of the Public Fiduciary in the community while actively participating and communicating with medical, legal, and provider community partners to foster improved client outcomes.
- Participates in general management, program development and development of departmental goals, policies and procedures.
- Performs other duties and/or projects as assigned.
- Establish, maintain and provide ongoing Continued Education Credits (CEU's) within the office to ensure continuity of the delivery of fiduciary services.
- Participate, track and monitor outcomes for Managing for Results (MFR) strategic planning specific to the areas with direct supervision and tied to MFR.
- Track and monitor trends that may impact the way the Public Fiduciary does business and proactively bring identified issues to the management team meetings.
- Obtain and maintain a comprehensive working knowledge of the various duties performed by fiduciaries and assist staff with compliance to Rules and Laws governing this profession.
- Ensures informed decision making through thorough investigation of the case facts and issues and comprehensive documentation.

### Glossary:

**Market Range Title:** Broad grouping of related positions with like job responsibilities and qualifications. Market Range Titles typically include positions ranging from entry level to senior/lead level unless indicated otherwise.

**Effective date:** The date the salary range was implemented for use.

**Market Range Title Description:** Broad description of sample job duties and responsibilities of positions included in the Market Range Title. Each position included in a Market Range Title also has a job description that is specific to the department. Departments are responsible for writing and maintaining job descriptions for positions in their department. Employee Compensation is responsible for writing and maintaining Market Range Title Descriptions.

**Likely Minimum Qualifications:** Typical minimum qualifications for positions assigned to the Market Range Title. Because a broad group of jobs in different departments are included in a Market Range Title, minimum and preferred qualifications may vary slightly depending on the area of assignment.

**Market Range:** The minimum, midpoint, and maximum salary points for all positions included in the Market Range Title.

**Hiring Range:** The hiring range for all positions is ordinarily the minimum of the market range to the midpoint. The use of a different hiring range must be approved by Employee Compensation. Departments should use a hiring range that is within their funding capabilities and are required to comply with the County's Funded Position Policy ensuring that applicants are extended a rate that is supported by the department's budget.

**Working Title:** The specific title used by a department to identify a position within their organizational structure. Use of working titles is flexible and aimed to assist departments in identifying the unique functions and responsibilities of each position and is representative of the assigned Market Range Title. Ordinarily, supervisory and/or managerial titles should not be used for positions not assigned to a supervisory and/or manager Market Range Title.

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## Market Range

Minimum Hourly Rate	Midpoint / Hiring Maximum	Maximum Hourly Rate
\$26.15	\$31.65	\$37.15

## Likely Minimum Qualifications

- Bachelor's degree with a specialization in Gerontology, Social Services, Behavioral Science, Public or Business Administration, Finance, Accounting, Criminal Justice, or a closely related field and two (2) years of related professional fiduciary experience, such as administration of guardianships, conservatorships, or managing caseloads pertaining to meeting the personal and financial needs of clients, or related investigative work.
- Other combinations of education and experience may be considered in substitution for the minimum qualifications

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