*Code: 7438*
*Title: PUBLIC FIDUCIARY DEPUTY DIRECTOR*

SUMMARY: Plans, organizes and oversees management of the personal and financial affairs of persons or decedent estates placed under guardianship, conservatorship, or probate estate, by the court, for wards of the Pima County Public Fiduciary Office. This classification is appointed, unclassified and exempt from the Pima County Merit System Rules.

DUTIES/RESPONSIBILITIES: (Work assignments may vary depending on the department's needs and will be communicated to the applicant or incumbent by the supervisor.)

Plans, organizes and oversees assigned staff and functions, programs and activities related to conducting client assessments for social, financial/medical and related services and developing and implementing care or management plans;
Assists the Public Fiduciary with determining the optimal organizational structure and personnel needs, providing for the selection, training, supervision and evaluation of professional, and support staff;
Plans, schedules and assigns work to managers/supervisors, and coordinates work between them;
Oversees the assessment of potential wards which includes psycho-social history and mental status or the Saint Louis University Mental Status (SLUMS) evaluation;
Oversees network maintenance of cost effective social and financial/medical services;
Remains current on fiduciary-related laws and regulations and formulates department procedures and policies, analyzes program effectiveness, and recommends changes in programs;
Develops and reviews relevant County policies and procedures to ensure compliance with state guidelines and fiduciary-related laws and regulations;
Reviews proposed and new legislation and reports to the Public Fiduciary on impact to clients and services;
Reviews proposed budgets of assigned units and participates in the development of the departmental budget;
Interprets investment and financial instrument reports;
Manages the departmental computer applications and security;
Monitors programs and prepares management reports, summary reports and other informational reports;
Oversees and coordinates activities with other County departments and with community agencies;
Assists with the preparation of the annual budget and evaluates and monitors expenditures;
Responds to County and public inquiries and performs community relations activities;
Establishes and maintains liaison with local, state and federal governmental agencies;
Represents the Public Fiduciary in a variety of forums, meetings, commissions, the County Board of Supervisors, state and federal agencies, social organizations, court/public hearings, community meetings and like events;
Responds to inquiries, complaints and requests from the community, and when applicable, recommends changes in programs, policies or procedures to address community concerns;
Participates in the development or review of contracts, grant proposals, Inter Governmental Agreements (IGA) and like materials.

KNOWLEDGE & SKILLS:

Knowledge of:
- administering, supervising, evaluating and training assigned divisions;

- methods, principles and practices of case management, social work, or psychodynamics;
- techniques of conducting patient and client financial/medical assessments, i.e., SLUMS, crisis intervention, quality-of-care and service evaluations;
- budget preparation and evaluation;
- financial/medical issues and needs of aged, disabled and institutionalized persons and care alternatives;
- principles and techniques of effective written and oral communication;
- available community resources, government programs and social service agencies;
- methods of property valuation, inventory techniques and terminology related to real estate and insurance;
- principles and practices of accounting;
- rules, regulations, policies and contract provisions governing care facilities;
- conservatorship/guardianship statutes, court rules, standards responsibilities of a fiduciary advocate;
- investment portfolio management and applicable tax laws.

Skill in:
- planning, organizing and overseeing fiduciary-related programs and activities;
- overseeing the interpretation and implementation of fiduciary-related rules, regulations, policies and procedures, operations and activities;
- assessing program achievements and deficiencies and developing solutions;
- communicating effectively, both orally and in writing;
- overseeing the supervision, training and evaluation of personnel;
- interpreting investment and financial instrument reports;
- negotiating contracts and agreements;
- analyzing, assessing and evaluating financial/medical service provisions and quality of care;
- establishing and maintaining effective working relationships with professional staff, care givers, service providers and community organizations;
- overseeing staff in a multi-disciplinary team environment;
- analyzing and evaluating financial/medical case history information;
- counseling clients and family members and performing crisis intervention;
- writing professional reports and service plans;
- overseeing professional staff which serve as an effective fiduciary advocate;
- managing departmental computer applications and security.

DESIRED QUALIFICATIONS:
Typically a position in this classification will have a Bachelor's degree from an accredited college or university with a major in social science, public or business administration, finance, accounting or a closely related field as defined by the appointing authority and five years of experience providing asset management/distribution, accounting and related social services.
(Additional relevant work experience and/or education from an accredited college or university may be substituted.)

OTHER REQUIREMENTS:

Licenses and Certificates: This position requires a valid Arizona Class D driver license at the time of application. This position requires current Arizona Supreme Court Fiduciary Licensure within 6 months of appointment. Failure to obtain and maintain appropriate licensure, certification and/or registration shall be grounds for termination.

Physical/Sensory Requirements: Physical and sensory abilities will be determined by position.

This classification specification is intended to indicate the basic nature of positions allocated to the classification and examples of typical duties that may be assigned. It does not imply that all positions within the classification perform all of the duties listed, nor does it necessarily list all possible duties that may be assigned.