

DIRECTOR , PROBATE

DEFINITION

Under administrative direction, to plan, organize, coordinate, and direct the Probate Court Services Unit, with direct supervision for probate investigators; to be responsible for investigations and case evaluation; to supervise staff; to organize and schedule unit workload and support services; to serve as a Court liaison with other government agencies, civic groups, and the legal community; and to do related work as required.

DISTINGUISHING CHARACTERISTICS

The is a special classification for the position which has responsibility for the management, administration, and supervision of the Probate Court Services Unit.

REPORTS TO

Chief Executive Officer and Presiding Judge, Probate Court.

CLASSIFICATIONS SUPERVISED

Assistant Director, Probate; Probate Examiner; Probate Investigator; Deputy Court Clerk I; II; III and other support staff, as assigned.

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

Plans, organizes, coordinates, and directs the activities of the Probate Court Services unit; provides administrative staff support for judicial officers; interprets codes, policies, and procedures for staff and the public; serves on a variety of task forces and advisory committees; represents the Probate Court with other departments and agencies; assists with planning and administration of the budget; monitors legislative developments, evaluating their impact on Court functions and developing recommendations to ensure compliance; compiles and analyzes statistical data; formulates and implements policies and procedures; selects, trains, supervises, and evaluates staff; attends Probate Court Proceedings, when necessary; provides guidance and direction for staff in investigations and case evaluations; makes case assignments and reviews staff work; develops and implements new programs related to Probate Court functions; reviews staff reports regarding conservatorship and guardianship; represents the Court in a variety of contacts with the general public, the legal community, community organizations, and other government agencies. In addition, performs duties of a Probate Investigator.

TYPICAL PHYSICAL REQUIREMENTS

Sit for extended periods; frequently stand and walk; drive an automobile to investigation sites; normal manual dexterity and eye-hand coordination; lift and move objects weighing up to 25 lbs; corrected hearing and vision to normal range; verbal communication; use of office equipment, including computer, telephone, calculator, copiers, and FAX.

TYPICAL WORKING CONDITIONS

Work is performed in an office and in various courtroom locations throughout the City and County; continuous contact with judicial officers, attorneys, litigants, other staff and the general public.

DESIRABLE QUALIFICATIONS

Knowledge of:

- Functions and operations of the Superior Court of California, County of San Francisco, including the Probate Court.
- Laws, rules, codes, regulations, policies, and legislation related to Court operations and functions, particularly those related to Probate Court functions.
- Investigative methods, including interviewing techniques and requirements for preparing court reports.
- Legal terminology and pleadings relevant to probate cases.
- Legal procedures and requirements for filing documents in Probate Court.
- Accounting and bookkeeping principles applicable to probate cases.
- Personal computers and software applicable to probate case analysis.
- Principles of effective public and community relations.
- Program planning, development, and evaluation.
- Principles of public administration, management, supervision, training, and employee evaluation.

Ability to:

- Plan, organize, administer, manage, and coordinate the support services, case evaluation, and investigation functions of the Probate Court.
- Provide supervision, training, and work evaluation for assigned staff.
- Consult with and advise judges and Court management staff regarding Probate Court operations and services.
- Interpret, explain, and apply a variety of codes, statutes, policies, rules, procedures, instructions, and regulations related to Probate Court functions.
- Develop and implement goals, objectives, policies, procedures and work standards.
- Analyze complex problems and evaluate alternatives.

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**Superior Court of California
County of San Francisco**

**Class Code: 0165
Date Established: 6/17/99
Date Last Revised:**

- Prepare clear, concise, and accurate records and reports.
- Provide guidance and direction for staff in Probate case evaluations and guardianship and conservatorship investigations.
- Testify in court.
- Establish and maintain effective working relationships with individuals from varying socioeconomic backgrounds.
- Effectively represent the Court in answering questions, responding to inquires, providing assistance, and dealing with concerns from the public, community organizations, other Court staff, and other government agencies.
- Maintain confidential information when required by legal or ethical standards.
- Establish and maintain cooperative working relationships.

Training and Experience:

Any combination of training and experience which would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Ten years of professional work experience in Probate Court case evaluation and investigative work, preferably including five years of experience in a management and/or supervisory capacity.

Special Requirements:

Possession of a valid and current California Driver's License.

Incumbents may be required to pass a criminal history background check. Information discovered through such a background check may become grounds for dismissal from employment.

The contents of this class specification shall not be construed to constitute any expressed or implied warranty or guarantee, nor shall it constitute a contract of employment. The contents of this specification may be modified or revoked without notice. Terms and conditions of employment are "at will" employment at the pleasure of the Judges of the Superior Court of California, County of San Francisco.