

PROBATE INVESTIGATOR

DEFINITION

Under general direction, to conduct investigations for probate conservatorship and guardianship cases; to prepare comprehensive reports and recommendations for the Court; to consult with judicial officers, attorneys, petitioners and attend hearings, as necessary; to assist with mediating, as assigned; and to do related work as required.

DISTINGUISHING CHARACTERISTICS

This is a specialist class for performing a variety of reviews and analyses of pending guardianship and conservatorship cases prior to hearing in court, as well as conducting required investigations for on-going conservatorship and guardianship. Incumbents prepare analyses and reviews, including comprehensive reports for judicial officers and work with attorneys and to resolve problems.

REPORTS TO

Assistant Director, Probate or Director, Probate.

CLASSIFICATIONS SUPERVISED

This is not a supervisory class.

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

Examines a variety of forms and documents from court files and other sources related to conservatorship and guardianship matters for new cases and on-going cases which are the responsibility of the Court; conducts telephone interviews with a variety of parties; conducts field investigations and interviews in homes and other locations; obtains statements, affidavits, and other evidence related to conservatorship and guardianship; prepares detailed written reports for review by judicial officers; consults with judicial officers, supervisors, and colleagues regarding the implications of information which has been gathered; attends hearings and remains available to judicial officers, as necessary; works with attorneys and petitioners on conservatorship and guardianship cases; organizes case load and coordinates the maintenance of case files with office support staff; prepares status reports as required by statute and the Court; may assist with mediation of issues with concerned parties, prior to formal court proceedings; provides formal testimony on investigative findings and recommendations, when needed; provides general information to the public, outside agencies, and other concerned parties.

TYPICAL PHYSICAL REQUIREMENTS

Sit for extended periods; frequently stand and walk; frequently drive an automobile; 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, court room, and a variety of environments and locations visited during field investigations; continuous contact with other staff and the public.

DESIRABLE QUALIFICATIONS

Knowledge of:

- Provisions of the California Probate Code, relevant statutes and rules of the California Judicial Council and the Superior Court of California, County of San Francisco, and other statutes relevant to conservatorship and guardianship.
- Legal terminology and pleadings relevant to conservatorship and guardianship cases.
- Interviewing, mediation, and counseling techniques.
- Principles of individual and group behavior.
- Information development and report writing techniques.
- Basic knowledge of personal computers and software applicable to investigative work.

Ability to:

- Perform a variety of investigative work and information development pertinent to conservatorship and guardianship.
- Understand, interpret, and apply appropriate provisions of statutes, rules, and policies applicable to conservatorship and guardianship.
- Perform a variety of complex document and case analysis and effectively communicate findings both orally and in writing.
- Prepare comprehensive and concise reports and recommendations related to conservatorship and guardianship.
- Work effectively with people from a variety of socioeconomic backgrounds.
- Develop objective analyses and recommendations for use by judicial officers.
- Effectively represent the Superior Court of California, County of San Francisco and the Probate Court with the public, attorneys, petitioners, and representatives of other government agencies and court systems.
- 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:

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Superior Court of California
County of San Francisco

Class Code: 0362
Date Established: 6/17/99
Date Last Revised:

Five years of responsible work experience in developing information and recommendations related to conservatorship and guardianship, preferably including direct experience in working with documents and procedures related to matters heard in conservatorship and guardianship court cases.

Education equivalent to graduation from an accredited college or university with a Bachelor of Arts or a Bachelor of Science degree in social science, gerontology, political science, business, or a closely related field.

Special Requirements:

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

An incumbent 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.