Public Guardian/Public Administrator
2018 YEAR IN REVIEW

Capacity
✓ Filled several vacant positions
✓ Reorganized caseload to manage expanding service needs across county
✓ Managed a caseload of 320 which included decedent estates, LPS conservatorship, and probate conservatorship
✓ Managed 42 referrals that included decedent estates, LPS conservatorship, LPS Criminal, probate conservatorship, and rep-payee

Accounting
✓ During an average six-month period this year, the Public Guardian managed
  • $622,971.01 in Client’s monthly income and
  • $512,178.16 in Client’s monthly expenses
✓ Staff prepared 300+ SSA Representative Payee Reports, 14 Veteran’s Affairs Accountings, and 50 Court Accountings in 2018

Organization
✓ Closed and successfully transferred Probate Conservatorship cases to an alternative third party or private fiduciary
✓ Created a process for Deputies, Finance, and Chief Deputy to produce thorough and complete accountings which increased productivity and reduced Superior Court’s need for follow up probate notes, which also reduced County Counsel hours expended
✓ Finance Staff provided training to Behavioral Health Staff for how to manage Sub-Payee clients’ cases and income and expenses
✓ Developed a collaboration between Behavioral Health and Public Guardian for the purpose of increasing our services of LPS Conservatorship cases. Areas covered included
  • Re-establishment of the 12-month conservatorship period
  • Termination of the conservatorship
  • Supportive services for clients during the conservatorship period and after termination
✓ Staff attended and became certified in State mandated training

What’s next in 2019?
The Public Guardian will continue to work in the above-mentioned areas, including working with stakeholders to develop relationships for the collaboration of client services. The Public Guardian is striving to create a working environment that encompasses health equity for clients as well as work equity for our dedicated staff.

For more information please contact: health@co.monterey.ca.us