



Probate Court Manager

Class Code:
5012

Bargaining Unit: Alameda County Management Employees
Association

SUPERIOR COURT OF CALIFORNIA, COUNTY OF ALAMEDA
Established Date: Jun 22, 2018
Revision Date: Jun 22, 2018

SALARY RANGE

SEE SALARY SCHEDULE

JOB DESCRIPTION:

JOB DEFINITION

Under direction of the Division Director or designee, a Probate Court Manager, provides technical expertise in the procedural aspects of probate cases as well as supervision of assigned staff, and performs related duties as assigned.

DISTINGUISHING FEATURES

Probate Court Manager is the supervisory level classification assigned to the Probate Investigator and Probate Examiner Units. The classification is differentiated from the next lower classifications of Investigator and Probate examiner by the assignment of, and responsibility for, the planning, coordinating, prioritizing and monitoring of the daily workflow of the unit, including the supervision, mentoring, training, evaluation and provision of technical guidance to Court Investigators and Probate Examiners.

EXAMPLES OF DUTIES:

NOTE: The following are duties performed by employees in this classification. However, employees in this classification may perform other related duties at an equivalent level, and do not necessarily perform all of the listed duties.

1. Prioritizes and assigns work; monitors workflow and timelines; conducts regular quality control of reports for compliance with statutes and policies; develops and/or updates policies, procedures, forms and materials in response to changes in the law and/or court practices; serves as liaison to the probate judges.
2. Oversees investigations and interviews in conservatorship and guardianship matters; assesses living conditions, reviews medical records, petitions, reports and fiduciary accountings; makes determinations and provides written recommendations to the Court;

attends hearings; briefs judicial officer about particular cases; and follows up on judicial orders.

3. Oversees the review of probate files that involve calendared and ex parte conservatorship, guardianship, trust and estate matters for procedural and technical deficiencies and necessary court action; advises attorneys and/or staff of judicial actions and procedural defects in filings; briefs judicial officers on outstanding items, unusual cases; and performs research as requested.
4. Oversees the recommendations in matters that are in order and can be granted on the verified petition.
5. Reviews and approves requests for waiver and/or deferment of Court Investigator fees. Maintains files for Private Professional Conservators; processes applications, including background checks; updates listing; and ensures compliance with requirements.
6. Participates in employee selection, creates training plans for staff and ensures adequate and timely training; establishes performance standards; evaluates employees' job performance; and investigates and recommends disciplinary action.
7. Serves on committees and/or task forces within the Court, local and state agencies and various other organizations.
8. Acts as liaison between the court investigator and probate examiner offices and the community.
9. Participates in developing and implementing goals and objectives; conducts operational and analytical studies and makes recommendations as appropriate; conducts audits of work procedures and products to ensure efficiency and compliance with applicable state and local rules and regulations; creates training and procedural manuals.
10. Performs other related duties as assigned.

MINIMUM QUALIFICATIONS:

Education

Possession of a bachelor of arts or bachelor of science degree from an accredited university in a science, a social science, a behavioral science, liberal arts, or nursing from an accredited education institution; and

And

Experience:

A minimum of two years' employment experience performing casework or investigations in a legal environment (includes a court, public or private law office, a public administrator, public guardian, public conservator, or private professional fiduciary), and the equivalent to two years of supervisory or management experience with responsibilities for a division, department or agency in a business, court or legal environment with the proven ability to plan, assign, supervise, review and evaluate the work of professional staff.

In addition to meeting the minimum requirements under one of the options above, candidates must also meet all of the qualifications of a probate examiner AND probate investigator as set

forth in rule 10.777 of the California Rules of Court and any other applicable legal authority.

KNOWLEDGE AND ABILITIES:

Knowledge of principles and practices of supervision, training and management; applicable federal, state and local laws, regulations, statutes and rules relating to scope of responsibility; complex legal, and administrative terminology, phraseology, documents, and procedures; grammar, spelling, vocabulary and punctuation; courtroom procedures and protocol. Strong technological skills.

Ability to understand, interpret and apply pertinent provisions of the Probate Code, Civil Code, and other California Codes, Judicial Council and Superior Court rules and procedures. Ability to supervise, train, assign, review and evaluate the work of others; manage schedules involving numerous individuals; direct, manage, evaluate and administer various court-related programs; meet with direct reports and manager regularly to discuss operational issues; coordinate the day to day functions of assigned Units and staff; establish and maintain effective working relationships with judicial officers, court administration, court staff, attorneys, justice partners; maintain confidential information where legal standards so require; deal professionally and courteously with the bar, litigants and the public in general.

NOTE: The following are duties performed by employees in this classification; however, employees may perform other related duties at an equivalent level. Each individual in the classification does not necessarily perform all listed duties.

Physical Demands:

Physical demands include strength, dexterity, coordination and vision to use a keyboard and video display terminal; hearing, listening and speaking to communicate with the public and court staff; dexterity and coordination to handle files and single pieces of paper; and moving from place to place within an office or other court location. The job requires occasional travel by car.

Working Conditions:

Video display terminals are used on a daily basis. Attend meetings, respond to emails, and engage in work as needed outside of normal business hours. Work occasional evening and weekend hours. May be required to travel statewide as necessary.

FLSA Status:

Exempt