

## **ASSISTANT DIRECTOR, PROBATE**

### **DEFINITION**

Under administrative direction, to assist with planning, organizing, coordinating, and directing the Probate Court Services Unit; to provide direction and guidance for Probate Examiners assigned to case evaluation and document review; to supervise staff; to organize and schedule Probate Examiner assignments; 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 assisting with the management, administration, and supervision of the Probate Court Services Unit. Direct supervision and guidance is provided for Probate Examiners.

### **REPORTS TO**

Director, Probate and Presiding Judge, Probate Court.

### **CLASSIFICATIONS SUPERVISED**

Probate Examiner 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.)*

Assists with planning, organizing, coordinating, and directing 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; reviews Probate files and communicates with attorneys regarding defects in pleadings; prepares hearing notes for judicial officers; provides guidance and direction for Probate Examiners regarding case evaluations; interviews and assists with hiring new Probate Examiners; reviews legislation and appellate court rulings, updating staff regarding changes which Probate case evaluations and document reviews; establishes Probate calendars and ensures equitable distribution of workload; compiles and analyzes statistical data; assists with formulation and implementation of policies and procedures; trains, supervises, and evaluates staff; attends Probate Court Proceedings, when necessary; represents the Court in a variety of contacts with the general public, the legal

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community, community organizations, and other government agencies. In addition, performs duties of a Probate Examiner.

**TYPICAL PHYSICAL REQUIREMENTS**

Sit for extended periods; frequently stand and walk; 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.
- 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.
- Principles of public administration, management, supervision, training, and employee evaluation.

**Ability to:**

- Assist with planning, organizing, managing, and coordinating the support services and case evaluation 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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- Prepare clear, concise, and accurate records and reports.
- Provide guidance and direction for staff in Probate case evaluations.
- 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:

Seven years of professional work experience in Probate Court case evaluation and document examination, preferably including four years of experience in a lead or supervisory capacity.

**Special Requirements:**

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.*