

SUBMITTAL TO THE BOARD OF SUPERVISORS
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA



ITEM: 3.34
(ID # 31393)

MEETING DATE:

Tuesday, September 15, 2026

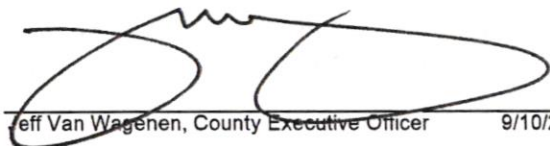
FROM : EXECUTIVE OFFICE

SUBJECT: EXECUTIVE OFFICE: Approval of the Response to the 2025-2026 Grand Jury Report 'Office of the Public Guardian: How Well Do They Protect Riverside County's Most Vulnerable?'

RECOMMENDED MOTION: That the Board of Supervisors:

1. Approve, with or without modification, the attached response to the 2025-26 Grand Jury Report: Office of the Public Guardian: How Well Do They Protect Riverside County's Most Vulnerable?; and
2. Direct the Clerk of the Board to immediately forward the Board's finalized responses to the Grand Jury, the Presiding Judge, and the County Clerk-Recorder.

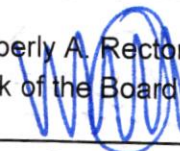
ACTION:Policy


Jeff Van Wagenen, County Executive Officer 9/10/2026

MINUTES OF THE BOARD OF SUPERVISORS

On motion of Supervisor Washington, seconded by Supervisor Perez and duly carried by unanimous vote, IT WAS ORDERED that the above matter is approved as recommended.

Ayes: Medina, Spiegel, Washington, Perez, and Gutierrez
Nays: None
Absent: None
Date: September 15, 2026
xc: EO, RUHS-BH, Grand Jury, Presiding Judge, Recorder

Kimberly A. Rector
Clerk of the Board
By: 
Deputy

**SUBMITTAL TO THE BOARD OF SUPERVISORS COUNTY OF RIVERSIDE,
STATE OF CALIFORNIA**

FINANCIAL DATA	Current Fiscal Year:	Next Fiscal Year:	Total Cost:	Ongoing Cost
COST	N/A	N/A	N/A	N/A
NET COUNTY COST	N/A	N/A	N/A	N/A
SOURCE OF FUNDS: N/A			Budget Adjustment: No	
			For Fiscal Year: 25/26	

C.E.O. RECOMMENDATION: Approve.

BACKGROUND:

Summary

On June 16, 2026, the Riverside County Civil Grand Jury publicly released the report titled *Office of the Public Guardian: How Well Do They Protect Riverside County's Most Vulnerable?* The report reviews the practices of the Office of the Public Guardian (OPG) related to in-person conservatee visits, visit tracking and documentation, scheduling, use of the Panoramic case-management system, Deputy Public Guardian training, and the effect of caseload, vacancies, and training demands on program operations.

The OPG operates within Riverside University Health System – Behavioral Health (RUHS-BH) and serves individuals for whom the Public Guardian has been appointed conservator. Public Guardian work is complex and specialized. Deputy Public Guardians serve conservatees with significant medical, behavioral health, cognitive, legal, placement, family, and financial needs. Timely in-person visits, accurate documentation, appropriate caseloads, consistent supervision, reliable case-management systems, and effective training are essential to protecting conservatees and supporting staff.

The attached response reaffirms the Board's commitment to protecting vulnerable conservatees and ensuring that County systems support timely, accountable, and effective conservatorship services. The response recognizes that the OPG has already implemented or initiated improvements related to visit tracking, supervisory monitoring, scheduling, recruitment, software reporting, and training.

The response agrees that visit documentation, centralized monitoring, and supervisory follow-up needed to be strengthened. At the same time, the response clarifies that the County does not interpret the report to establish that every undocumented or unverified visit did not occur. Rather, the response treats the issue as a need for stronger centralized tracking, documentation, and supervisory monitoring.

Since the Civil Grand Jury interviews, the OPG began using a Panoramic report that identifies the date of the last visit for each conservatee. The report is automatically distributed every two weeks to management staff, including supervisors. Supervisors are directed to review the report, identify visits requiring follow-up, and direct staff accordingly. The program administrator also reviews the report with subordinate supervisors to confirm appropriate follow-up. Visit documentation expectations have also been communicated to deputies during all-staff meetings and in writing.

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The Board also recognizes that staffing, caseload distribution, recruitment, and retention affect the Office of the Public Guardian's ability to complete timely visits, maintain accurate documentation, train new staff, and provide effective supervision. The response notes that the County will continue evaluating whether staffing levels, caseload distribution, and recruitment barriers affect the Public Guardian's ability to meet visit, documentation, training, and supervisory expectations.

Approval of this item will authorize submission of the Board's response in accordance with Penal Code sections 933 and 933.05 and Board Policy A-75.

ATTACHMENTS:

ATTACHMENT A. 2025-26 Civil Grand Jury Report: Office of the Public Guardian: How Well Do They Protect Riverside County's Most Vulnerable?

ATTACHMENT B. Board of Supervisors Response to the 2025-2026 Civil Grand Jury Report: Office of the Public Guardian: How Well Do They Protect Riverside County's Most Vulnerable?


Minh C. Tran, County Counsel 9/10/2026

2025-26 Grand Jury Report
Office of the Public Guardian: How Well Do They Protect Riverside
County's Most Vulnerable?
September 15, 2026
Board of Supervisors

The Board of Supervisors appreciates the Civil Grand Jury's service and its review of the Public Guardian. The Board shares the Grand Jury's commitment to protecting persons for whom the Public Guardian has been appointed conservator and to ensuring that County systems support timely, accountable, and effective conservatorship services.

These responses were prepared by the Executive Office, with input from the Office of the Public Guardian (OPG) and other departments as appropriate.

The Board recognizes that public guardian work is complex, specialized, and difficult. Deputy Public Guardians serve conservatees with significant medical, behavioral health, cognitive, legal, placement, family, and financial needs. Timely in-person visits, accurate documentation, appropriate caseloads, consistent supervision, reliable case-management systems, and effective training are essential to protecting conservatees and supporting staff.

OPG has already implemented or initiated improvements related to visit tracking, supervisory monitoring, scheduling, recruitment, software reporting, and training. The County will continue to monitor the effectiveness of those actions, document follow-up, and make additional adjustments as needed.

The Board also recognizes that staffing, caseload distribution, recruitment, and retention affect the OPG's ability to complete timely visits, maintain accurate documentation, train new staff, and provide effective supervision. According to a recent OPG caseload report to the Executive Office, average client volume was approximately 73 conservatees per deputy in the Lanterman-Petris-Short Act (LPS) unit and 27 conservatees per deputy in the Probate unit. RUHS-BH has reported active recruitment for deputy vacancies and both Senior Deputy Public Guardian positions. The County will continue evaluating whether staffing levels, caseload distribution, and recruitment barriers affect the Public Guardian's ability to meet visit, documentation, training, and supervisory expectations.

GRAND JURY FINDINGS:

Grand Jury Finding #1:

The Public Guardian does not regularly or consistently track in-person visits in a systematic manner to ensure that all conservatees are visited at least once every ninety days.

Response to Grand Jury Finding #1:

Respondent agrees with finding.

The County agrees that visit documentation, centralized monitoring, and supervisory follow-up needed to be strengthened. The County's agreement with this finding is limited to the need for stronger centralized tracking, documentation, and supervisory monitoring. The County does not interpret the finding to establish that every undocumented or unverified visit did not occur.

Since the Grand Jury interviews, OPG began using a Panoramic report that identifies the date of the last visit for each conservatee. The report is automatically distributed every two weeks to management staff, including supervisors. Supervisors are directed to review the report, identify visits requiring follow-up, and direct staff accordingly. The program administrator also reviews the report with subordinate supervisors to confirm appropriate follow-up.

OPG has also communicated visit documentation expectations to deputies during all-staff meetings and in writing. These actions provide a more consistent and accountable process for monitoring visits on a per-conservatee basis. This approach strengthens management's ability to identify overdue visits, follow up with staff, and verify documentation through a routine reporting process that did not previously exist in the same centralized form.

The County will continue monitoring whether the Panoramic report reliably captures required in-person visits, whether staff are documenting visits consistently, and whether additional workflow, supervision, or reporting improvements are needed.

Grand Jury Finding #2:

The Panoramic software used by the Public Guardian is customizable and must be updated to specifically track and report in-person visits with conservatees by deputies so that Public Guardian Management can ensure that individual deputies are able to complete in-person visits as required.

Response to Grand Jury Finding #2:

Respondent disagrees partially with the finding.

The County agrees with the Grand Jury's underlying concern that OPG management needs a reliable system to track, report, and monitor in-person conservatee visits. The County disagrees partially with the finding to the extent it suggests that Panoramic lacked all relevant functionality or that a new tracking method had not already been developed.

Panoramic includes a "Visits" function, and a report identifying the date of the last visit for each conservatee is now available and in use. The report is automatically sent to management and supervisory staff every other week. Supervisors are expected to review

the report, follow up with staff regarding visits requiring attention, and verify that visit documentation is completed.

This process directly addresses the concern raised by the Grand Jury by improving management visibility and reinforcing consistent use of the system. OPG will continue to evaluate whether additional Panoramic refinements, reporting tools, staff guidance, or workflow improvements are needed to further support accurate documentation and timely supervisory review.

The County also notes that Panoramic is OPG's case-management and activity-tracking database. The electronic health record system referenced in the report as "ELMR" is MyAvatar by Netsmart. OPG will continue reviewing workflow and documentation practices to reduce unnecessary duplication where possible and improve staff efficiency.

Grand Jury Finding #3:

A master schedule must be developed and implemented to ensure that a vehicle filled with an appropriate number of deputies travels once every ninety days to each facility where multiple conservatees are housed.

Response to Grand Jury Finding #3:

Respondent disagrees partially with the finding.

The County agrees that coordinated scheduling for facilities with multiple conservatees can be a useful supplemental planning tool. The Public Guardian program is reviewing whether a calendar-based facility visit schedule should be added for that purpose.

The County disagrees partially with the finding to the extent a facility-based master schedule is presented as the primary method for confirming timely visits to every conservatee. Conservatee placements are fluid. Facilities may have multiple Riverside County conservatees during one period, fewer conservatees during another, or none during a given month. A facility-based schedule alone may not reliably confirm that each conservatee receives a timely visit.

For that reason, the County's position is that the most accountable primary control is per-conservatee monitoring through the Panoramic visit report currently in use. This approach tracks each conservatee's last documented visit date rather than relying solely on facility location, which may change.

A facility-based schedule may improve travel coordination, especially for facilities housing multiple conservatees, but it should supplement, not replace, per-conservatee monitoring of each individual's last documented visit date.

Grand Jury Finding #4:

Deputies are subject to a restrictive work schedule which requires them to be present in the office every Tuesday and Thursday, and this interferes with their ability to complete in-person visits once every ninety days.

Response to Grand Jury Finding #4:

Respondent disagrees partially with the finding.

The County recognizes the Grand Jury's concern that deputy schedules must provide sufficient flexibility to complete required in-person conservatee visits. Field time is essential for effective conservatorship work.

The County disagrees partially with the finding to the extent it suggests that the prior Tuesday/Thursday office structure served no legitimate operational purpose. The prior office structure provided protected time for documentation, data entry, training, team meetings, supervision, case coordination, family or collateral contacts, and other office-based responsibilities. These duties also support quality care, timely follow-up, and appropriate oversight.

However, OPG has modified the schedule to address the underlying concern. Deputy Public Guardians are now required to remain in the office one day per week, rather than two days per week, to complete mandatory office work, training, and in-service meetings. Exceptions are permitted when field work or conservatee visits are operationally necessary.

This modification increases flexibility for in-person visits while preserving supervision, coordination, training, documentation, and accountability for office-based responsibilities.

Grand Jury Finding #5:

Training new deputies is a daunting task that involves supervising deputies sitting down with one or more new deputies over the course of their first year on the job to go over twenty-seven training modules. Supervising deputies also get involved when a more experienced deputy needs refresher training or skills reinforcement.

Response to Grand Jury Finding #5:

Respondent agrees with finding.

The County agrees that training Deputy Public Guardians is a significant responsibility. Public Guardian work is complex, specialized, and requires sound judgment, technical knowledge, field experience, documentation skills, and an understanding of conservatorship responsibilities.

The existing training structure reflects the seriousness of the work and the need to prepare staff for important duties involving vulnerable individuals. Supervisor-led instruction, field shadowing, case consultation, and refresher training remain important components of staff development. The County also recognizes that training demands place pressure on supervisors and that additional tools may improve consistency and efficiency.

Training must balance foundational knowledge with practical application. Some duties can be taught through standardized materials, while others require direct coaching, observation, shadowing, and case-specific guidance. OPG will continue to support training practices that prepare staff for the complexity of public guardian work while identifying opportunities to reduce avoidable burden on supervisors.

Grand Jury Finding #6:

Training in basic concepts and routine matters could be digitized with the help of workforce education and technology professionals to make this training more consistent and efficient and to relieve time pressures on supervising deputies who are responsible for most of the training of new deputies.

Response to Grand Jury Finding #6:

Respondent agrees with finding.

The County agrees that appropriate portions of deputy training can be digitized to improve consistency, access, and efficiency. OPG has contacted Workforce Education and Training, an internal unit, to begin identifying deputy training materials that are suitable for online delivery.

The department will focus on training content involving basic concepts and routine matters that do not change significantly over time. At the same time, OPG will preserve hands-on training, field shadowing, and supervisor-led coaching for duties that require direct instruction, judgment, and case-specific guidance.

Digitizing appropriate training materials will help provide consistent information to new deputies, make refresher training more accessible to experienced staff, and allow supervisors to focus more time on instruction, field preparation, and case consultation.

GRAND JURY RECOMMENDATIONS:

Grand Jury Recommendation #1:

Negotiate, schedule, and complete updates or alterations to the Panoramic software program so that it specifically tracks and reports on in-person visits to conservatees and then train supervising deputies and deputies to enter the necessary data and generate relevant reports.

Response to Grand Jury Recommendation #1:

Recommendation has been implemented.

The Public Guardian program now has a Panoramic report that identifies the date of the last visit for each conservatee. The report became available in June 2026 and is now in use.

The report is automatically distributed every two weeks to management staff, including supervisors. Supervisors are directed to review the report, identify visits requiring follow-up, and direct staff to take appropriate action. The program administrator reviews the report with subordinate supervisors to confirm follow-up has occurred.

Expectations regarding visit documentation in Panoramic have been reviewed with deputies in all-staff meetings and communicated in writing. Deputies have been instructed on entering visit documentation in Panoramic, and supervisors have been instructed on reviewing the recurring report, identifying overdue or undocumented visits, and following up with assigned staff. The County will continue monitoring the effectiveness of the report, staff documentation practices, and supervisory follow-up. Continued review will help determine whether additional software refinements, staff guidance, reporting enhancements, or workflow improvements are needed as the process becomes part of routine operations.

Grand Jury Recommendation #2:

Develop and maintain a master schedule that can be used to ensure that a vehicle filled with an appropriate number of deputies travels once every ninety days to each facility where multiple conservatees are housed.

Response to Grand Jury Recommendation #2:

Recommendation requires further analysis or study. The time frame is noted in the response, which shall not exceed six-months from the date of publication of the Grand Jury report.

The County agrees with the underlying goal of this recommendation: timely, coordinated, and accountable in-person visits for conservatees. The recommendation requires further analysis because a facility-based master schedule may be useful as a planning tool but may not be the most reliable primary method for tracking required visits.

Conservatee placements are fluid. Facilities may have multiple Riverside County conservatees during one period, fewer conservatees during another, or none during a given month. Because of these changes, a facility-based schedule alone may not reliably confirm that every conservatee receives a timely visit.

The scope of the analysis will include whether a calendar-based facility visit schedule should be adopted as a supplemental planning tool for facilities housing multiple conservatees; how such a schedule would interact with the Panoramic per-conservatee visit report; whether the schedule would improve field coordination and travel efficiency; and how to avoid creating a false sense of compliance based only on facility visits.

The Public Guardian program will complete this analysis by December 16, 2026, which is within six months of the public release of the Grand Jury report. The County's priority is to confirm timely contact with each conservatee, regardless of where that individual is placed at any given time.

Grand Jury Recommendation #3:

Eliminate restrictive scheduling that requires all deputies to work in the office every Tuesday and Thursday to allow them more time and flexibility to complete in-person visits to conservatees once every ninety days. (This recommendation is not intended to eliminate the requirement that all deputies must be present in the office to regularly attend team and all staff meetings. Nor is this recommendation intended to eliminate supervision of deputy schedules by supervising deputies.

Response to Grand Jury Recommendation #3:

Recommendation has been implemented.

The Public Guardian has eliminated the prior requirement that deputies remain in the office every Tuesday and Thursday. Deputy Public Guardians are now required to remain in the office one day per week, rather than two days per week, to complete mandatory office work, training, and in-service meetings. Exceptions are permitted when field work or conservatee visits are operationally necessary.

This change increases flexibility for in-person visits while preserving the office-based responsibilities necessary for documentation, supervision, training, case coordination, and accountability. This approach addresses the Grand Jury's concern while maintaining the supervision, coordination, and team communication necessary to protect conservatees and support staff.

Grand Jury Recommendation #4:

With the assistance of workforce education and technology professionals, digitize deputy training materials on basic concepts and routine matters that do not change significantly over time.

Response to Grand Jury Recommendation #4:

Recommendation has not been implemented, but will be implemented. The implementation time frame is noted in the response.

The County agrees with this recommendation. OPG has contacted the Workforce Education and Training Program, an internal unit, to begin the process of digitizing appropriate portions of deputy training materials.

The department will review existing training materials and identify content involving basic concepts and routine matters that are stable and appropriate for digital delivery. Digitized training may be used for new deputies and for experienced deputies who would benefit from refresher training or skills reinforcement.

OPG will preserve hands-on training, field shadowing, and supervisor-led coaching for work that requires direct instruction, practical application, judgment, and case-specific guidance. Online training will be used as a support tool, not as a replacement for supervisor engagement or field-based learning.

Implementation is expected to continue through June 30, 2027. This timeframe will allow OPG to identify appropriate training content, coordinate with Workforce Education and Training, convert suitable materials into a digital format, and preserve direct instruction for complex conservatorship duties.

The County remains committed to continuous improvement within the Public Guardian program. OPG has continued recruitment, improved visit tracking and supervisory monitoring, revised scheduling expectations, and initiated work to modernize appropriate training materials. The County will continue to support improvements that strengthen oversight, support staff, improve documentation, monitor visit compliance, and promote the safety, dignity, and well-being of conservatees served by the Public Guardian.