COUNTY OF SAN DIEGO RESPONSES TO 2025-2026 GRAND JURY REPORTS

COUNTY OF SAN DIEGO RESPONSE TO 2025-26 GRAND JURY REPORT "When No One Else is Left" Published June 12, 2026

FINDINGS

Finding 1: The Office of the Public Guardian is operating under sustained work-load pressure driven by rising caseloads and staffing levels that have not been formally reassessed in recent years. As a result, increased case assignments per deputy or case manager limit the office's ability to consistently provide individualized attention to complex estates and conservatorships. The absence of a current, data-driven workload and staffing analysis constrains the department's capacity to plan staffing levels, identify training needs and make informed long-term decisions.

> **Response:** The County of San Diego disagrees wholly with this finding. In 2023, the California Association of Public Administrators, Public Guardians, and Public Conservators (CAPAPGPC) provided a report that included statewide Public Guardian caseload data by county. The report showed that San Diego County's deputy caseloads were below the average of counties of similar size. Based on the 2023 CAPAPGPC data, San Diego Public Guardian deputies continue to carry caseloads that remain lower than those of comparable counties across the state. The San Diego County Office of the Public Guardian conducts internal caseload reviews monthly and have opportunities to compare them with other Public Guardian programs during monthly state-wide meetings and as needed. It's important to note that because each county Public Guardian program is structured differently and the individual cases have unique and varying needs, a formal workload study is not feasible.

Finding 2: The Office of the Public Administrator/Public Guardian (PA/PG) relies on administrative processes that involve multiple departments and external entities, yet these processes are not consistently documented or standardized across all stages of estate administration and conservatorship case management. As a result, administrative efficiency depends in part on informal knowledge and staff experience rather than uniform procedures. This condition may limit the office's ability to ensure consistent case handling, support effective training and onboarding and maintain continuity in operations.

> **Response:** The County of San Diego disagrees partially with this finding. The PA/PG uses the State of California's Conservatorship Handbook to guide the implementation of its policies and procedures and has developed several new policies over the past three years to strengthen documentation practices and operational consistency, with additional policies planned. Staff are notified of new policies through bulletins or

formal announcements, and all updates are reviewed during regular team meetings to ensure they are informed. Policies are also available to the public upon request, and all policies are guided by and aligned with the California Probate Code. The department is currently developing an investigative workflow tool to further improve consistency across investigations.

Finding 3: The absence of a formal training/succession plan or structured approach to preserving institutional knowledge limits the office's ability to maintain consistent practices and service quality during staffing transitions. As a result, operational effectiveness depends heavily on individual experience rather than standardized systems designed to support continuity over time.

Response: The County of San Diego disagrees partially with this finding. The Office of the Public Guardian maintains ongoing training for 10 months out of the year, including the entire month of February, which is dedicated to fiduciary responsibilities and professional development. In addition, California Probate Code requires PA/PG staff to comply with continuing education hours for certification with the CAPAPGPC, which may be met through conferences, online training and CAPAPGPC-provided coursework.

Over the past 18 months, the Office of the Public Administrator has implemented several new policies to strengthen documentation, standardization, and operational consistency. In addition, the Office of the Public Guardian is similarly developing additional policies to enhance alignment, support staff training, and ensure uniform procedures. Together, these efforts reflect a structured approach to preserving institutional knowledge and maintaining continuity during staffing transitions. Staff are notified of new policies through bulletins or formal announcements, and all updates are reviewed during regular team meetings to ensure they are informed. Policies are also available to the public upon request, and all policies are guided by and aligned with the California Probate Code.

The Office of the Public Guardian complies with all court ordered timelines and mandates and works closely with County Counsel to ensure operational effectiveness and adherence to statutory requirements.

Finding 4: The statutory role and authority of the Office of the Public Administrator/Public Guardian (PA/PG) are narrowly defined and may not be consistently understood by external referring entities or the public. As a result, referrals to the office may vary in completeness and alignment with statutory eligibility requirements. This inconsistent understanding may contribute to inefficiencies in the referral process, requiring PA/PG staff to spend additional time clarifying legal authority, obtaining missing information, or redirecting referrals that fall outside the office's mandate, thereby affecting the efficient use of staff resources and delaying timely case intake.

Response: The County of San Diego disagrees partially with this finding. While referrals to the office may vary in completeness and alignment with statutory eligibility requirements, the Aging & Independence Services website provides detailed information on the roles, functions, and referral process for the PA/PG. Under the Probate Code, referrals can be submitted by any interested party, including the public and professionals in medical and social services. The Office of the Public Guardian reviews all referrals, contacts the reporting party, communicates any denial decisions and reasons, and offers alternative resources as needed. This process is overseen by a Supervising Deputy Public Guardian to ensure it is carried out efficiently. Their involvement is crucial for establishing clear expectations and ensuring uniform service delivery.

The Office of the Public Guardian engages in community outreach and education to promote a clearer understanding of its role and statutory authority under conservatorship law. These efforts extend to the public, law enforcement agencies, medical professionals, and other County of San Diego programs.

Finding 5: Oversight of the Office of the Public Administrator/Public Guardian (PA/PG) is primarily structured around case-level judicial review and compliance with statutory and procedural requirements. While this framework ensures legal accountability in individual matters, it does not provide a comprehensive, program-level view of operational performance. The absence of standardized performance measures and consolidated reporting may limit county leadership's ability to evaluate trends in caseloads, processing timelines, staffing capacity, and overall effectiveness, resulting in administrative oversight that is constrained by incomplete visibility into the PA/PG's performance as an integrated county function rather than a collection of individual cases.

Response: The County of San Diego disagrees partially with this finding. Standardized performance measures are not easily defined since each case brings unique challenges including, but not limited to, family dynamics, criminal matters, jurisdictional issues, disputes over property/rights to intellectual property, disputes over existing estate documentation, sale of personal property, etc. The Office of the Public Guardian collects monthly statistics on referrals, court-ordered investigations, appointed conservatorships, inventories and appraisals, and length of time cases remain open prior to appointment. These data points serve as key accountability measures, enabling the Office to closely monitor workload trends, evaluate caseload distribution, and ensure timely and appropriate case management. The monthly data is included in regular reports to the department's executive leadership and appropriate follow-up action is taken based on key data points and prioritizing areas that need immediate action. This provides ongoing organizational accountability and visibility into program performance.

Finding 6: The Office of the Public Administrator/Public Guardian (PA/PG) relies on legacy technology systems that are not fully integrated with broader County information technology infrastructure. The absence of a documented PA/PG – specific technology plan may limit

data accuracy, reporting consistency and the County's ability to generate consolidated, program-level performance information.

> **Response:** The County of San Diego disagrees wholly with this finding. The Office of the Public Administrator/Public Guardian uses Panosoft, the CAPAPGPC approved case management system utilized by the majority of counties statewide. This system is not a legacy platform; rather, it does support case management functions, including standardized data entry, document management, auditing features, task tracking, and compliance monitoring. Additionally, it interfaces with other County IT infrastructure such as ERMS our electronic records managing system.
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> Additionally, the Office of the Public Administrator/Public Guardian also uses the Accurint (previously Lexus Nexus) search tool, as well as County Assessor/Tax information, Medi-Cal Eligibility Determination System (MEDS), a statewide data system, and other numerous search tools to support their work. The combination of PANO and these systems provide the Public Administrator/Public Guardian will the ability to access reliable information to support their work. By utilizing these systems, the Office of the Public Administrator/Public Guardian can quickly access dependable, cross-verified information. This supports informed decision-making, improves case efficiency, and ensures accurate handling of estates and client services.

RECOMMENDATIONS

The 2025-2026 San Diego County Grand Jury recommends that the County of San Diego's Aging & Independence Services:

Recommendation 1:
Staffing and Workload Alignment
The San Diego County Health and Human Services Agency (HHSA), in coordination with the Office of the Public Administrator/Public Guardian (PA/PG), should conduct a comprehensive, data-driven workload and staffing analysis to determine whether current staffing levels align with existing and projected caseload demands. This analysis should evaluate case complexity, time requirements, and staffing ratios to support informed resource allocation, training needs and long-term operational planning.

> **Response:** The recommendation will not be implemented. In 2023, CAPAPGPC established a subcommittee to support the development and maintenance of statewide professional standards and compiled caseload data for counties with similar populations. We have confirmed with the association that there are no plans to update the 2023 analysis. Caseloads for the PA/PG continue to remain below the average of comparable counties.
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> PA/PG collects monthly data on referrals, investigation timelines, and appointment volume, sharing it with leadership to support oversight and ensure compliance with mandated requirements. By tracking investigation duration, referral trends, and

workload, the program evaluates staffing adequacy and monitors individual caseload management.

Supervisors regularly review cases to identify trends such as rising complexity, recurring referral patterns, or procedural challenges, and use these insights to shape program wide training needs. Staff also participate in weekly case consultations with leadership, where training priorities are set based on evolving legal requirements and patterns observed across cases. In addition, CAPAPGPC requires ongoing professional development through conferences, online courses, and association provided training.

Recommendation 2:
Administrative Process Documentation and Coordination
The San Diego County Health and Human Services Agency (HHSA), in coordination with the Office of the Public Administrator/Public Guardian (PA/PG) and relevant departments should develop and maintain a documented, end-to-end workflow map for estate administration and conservatorship cases.

This effort should clarify interdepartmental roles, reduce duplicative or unclear procedural steps, standardize documentation practices and incorporate these processes into staff training and onboard materials.

Response: The recommendation has not yet been implemented but will be implemented in the future. The Office of the Public Administrator/Public Guardian (PA/PG) acknowledges the importance of strengthening internal procedures, documentation, and operational consistency. The PA/PG is currently engaged in a comprehensive review and update of its policies, workflows, and program practices to enhance clarity, improve efficiency, and ensure alignment with statutory requirements and best practices.

These efforts will continue over the coming months with updates implemented on a rolling basis as each component is completed. While the PA/PG agrees with the goal of strengthening internal controls, certain elements of the recommendation may require additional time, coordination and implementation which will be implemented in the next 18 months.

Recommendation 3:
Staffing Stability and Institutional Knowledge Preservation
The San Diego County Health and Human Services Agency (HHSA), in coordination with the Office of the Public Administrator/Public Guardian (PA/PG), should develop and implement a formal training, cross training and succession planning framework designed to preserve institutional knowledge and maintain continuity during staffing transitions.

Response: The recommendation has been implemented. The PA/PG has a formal training framework that includes onboarding as well as year-round supplemental

trainings that include sessions focused on fiduciary responsibilities. These trainings demonstrate the department's established approach to structured knowledge transfer, covering workflows, new policy implementation, and job specific procedures.

Recommendation 4:
Public Information and Referral Guide
The San Diego County Health and Human Services Agency (HHSA), in coordination with the Office of the Public Administrator/Public Guardian (PA/PG), should provide clear, accessible public guidance explaining the PA/PG's legal authority, eligibility criteria, and referral process. HHSA should ensure that this information enables hospitals, law enforcement agencies, courts and community organizations to make appropriate referrals and consider the use of standardized tools to improve referral completeness and efficiency.

Response: The recommendation has been implemented. Clear and accessible public guidance on the legal authority, eligibility criteria, and referral process for the Office of the Public Administrator/Public Guardian (PA/PG) is available on the Aging & Independence Services, Public Administrator and Public Guardian websites. These pages provide detailed instructions for submitting referrals and include direct access to the online referral portal.

The PA/PG accepts and encourages referrals from any source, including hospitals, law enforcement, courts, community partners, and members of the public. When a referral is inappropriate or incomplete, the Supervising Deputy PG contacts the reporting party to obtain clarification and explain why the referral cannot be accepted if so. This ensures accurate guidance, protects resources, and prevents unnecessary case initiation while still supporting community members and partner agencies. PA/PG's current approach ensures both efficiency and accuracy in opening appropriate referrals.

Recommendation 5:
Program Performance Monitoring and Accountability
The County of San Diego should develop and implement standardized, program-level performance measures and consolidated reporting for the Office of the Public Administrator/Public Guardian (PA/PG) to supplement existing case-level judicial oversight. This measure should enable County leadership to monitor trends in caseloads, processing timelines, staffing capacity and overall program effectiveness and to evaluate PA/PG operations as an integrated County function rather than solely through individual cases.

Response: The recommendation has been implemented. The Office of the Public Administrator/Public Guardian (PA/PG) compiles consolidated data, monitors trends, and reports program performance metrics on a routine basis. Monthly data is collected on referrals, investigation duration, court ordered investigations, conservatorship appointments, and Inventory and Appraisal timelines. Monthly data is collected on referrals, investigation duration, court- ordered investigations, conservatorship appointments, and Inventory and Appraisal timelines. This information is used to

evaluate caseloads, track case status, identify trends, and is reported to County leadership each month to ensure adequate staffing capacity.

Recommendation 6:
Technology Integration and Data Reporting
The County of San Diego, in coordination with the Office of the Public Administrator/Public Guardian (PA/PG) and County information technology leadership, should develop and implement a PA/PG specific technology integration plan aligned with county wide information technology standards. This plan should prioritize the replacement or integration of legacy systems, reduce reliance on manual and parallel recordkeeping and enable consolidated reporting on caseloads, processing timelines, staffing capacity and operational Performance.

Response: The recommendation will not be implemented. The Office of the Public Administrator/Public Guardian (PA/PG) currently uses the PANOSOFT Case Management System, which is the same California Association of Public Administrators, Public Guardians, Public Conservators (CAPAPGPC) approved system used across the majority of counties in California.

Changes or updates to the PANOSOFT Case Management System may involve additional costs and may require an additional cost analysis to determine whether enhancements or replacements are fiscally feasible. At this time enhancements to PANOSOFT are not warranted.

The PANOSOFT Case Management System is not a legacy platform, rather a modern case management system approved by CAPAPGPC and used consistently throughout California. PANOSOFT supports extensive reporting capabilities including Case Management Summary Reports; Timelines and Compliance Reports; Event/Task Reports; Financial Activity Reports, Court Calendar and Filing Reports and Case Documentation Reports. These reports provide detailed insights into caseloads, timeframes, workload distribution, documentation activity and financial operations. Previously, other software has been explored but did not offer the same capabilities as PANOSOFT.

Public Administrator/Public Guardian across the state are set up differently and some utilize different systems for their Public Administrator and Public Guardian. There is not a statewide requirement to use a specific system, but the majority of Public Administrator/Public Guardian programs operate with PANOSOFT.