

**POSITION ANNOUNCEMENT  
FIRST JUDICIAL DISTRICT OF PENNSYLVANIA  
EQUAL OPPORTUNITY EMPLOYER**

**POSITION: GUARDIANSHIP INVESTIGATOR**  
**Court of Common Pleas, Orphans Court Division**

**(Open to Promotion, Transfer, or New Applicants)**

**SALARY: \$42,380 - \$46,658 (G18)**

**FILING DEADLINE: Wednesday, June 22, 2016 @ 4:00 P.M.**

**REQUIREMENTS:**

1. Completion of a Bachelor's degree from an accredited college or university, with major course work in human services, social work, psychology, law, or related field
2. One (1) to two (2) years experience in investigation work; or work requiring public contact and acquiring facts.

**OR**

- Any equivalent combination of training and experience required to perform the essential functions of this class may substitute for those listed
3. City Residency required within six (6) months of satisfactory completion of an employment orientation period.
  4. Ability to perform the essential functions of a position in this class.

**GENERAL DEFINITION:**

This is investigation work gathering facts by inquiry, observation and examination of court records, financial records and in-person meeting. Working independently under general supervision, the Guardianship Investigator conducts investigative services on behalf of the Orphans' Court Division, Court of Common Pleas of Philadelphia County, monitoring court appointed guardians of the estate and person of incapacitated persons as well as other fiduciaries as directed by the Administrative Judge of the Orphans' Court. The services provided include assessing the appropriateness of proposed appointments, monitoring existing guardianships; meeting with court appointed guardians, incapacitated persons, family members and others, reporting findings in written format and orally in court; maintaining accurate records and documentation of work performed. Work may involve both inside and outside investigation. Contact with the public is significant and frequent. Work is performed under the close supervision of the Appointing Authority or designee. Assignments are stable in nature and performed in accordance with instructions and established routines.

**ESSENTIAL FUNCTIONS:**

***The functions and qualifications of a Guardianship Investigator, as described herein, are intended to describe the general nature and level of work being performed in this position. These are not to be construed as exclusive or all-inclusive. In order to meet the needs of those served by the Orphans' Court, employees may be assigned other duties, in addition to or in lieu of those described herein, and any duties are subject to change at any time.***

- Conducts interviews by telephone, visits residence of incapacitated persons, visits agency sites which provide residential care to incapacitated persons, ascertains the present living

circumstances of incapacitated persons, monitors the appointments of guardians, and verifies compliance with judicial orders.

- Accurately summarizes findings and reports to the court in oral and/or written form the relevant data and documentation collected and recommendations to the court.
- If requested, reviews petitions seeking the appointment of a guardian, the approval of an allowance from the estate of the incapacitated person, or other pleadings requiring investigation while applying state statute, local rules, and court standards.
- Reviews case records to verify compliance with state statutory requirements and local rules.
- Acts as a liaison with attorneys, guardians, interested parties and supports, and public or private sector organizations to achieve objectives of the investigation.
- Drafts court orders reflecting investigative recommendations according to the circumstances and facts collected or at the direction of the court.
- Maintains accurate records and documentation of work performed.
- Reviews and analyzes information from computer printouts, interviews, personnel files, and telephone communications relating to investigations.
- Prepares daily, monthly and yearly reports on investigative findings; ability to generate computer reports.
- Prepares correspondence, makes phone calls, and schedules appointments.
- Appears in court or other proceedings to provide testimony on investigative findings as necessary.
- Conducts Guardian and other Fiduciary Investigations.
- Performs other duties as assigned by Appointing Authority, designee and direct supervisor.

#### **MARGINAL FUNCTIONS:**

- Performs related work as required.
- May be asked to perform similar work and provide similar services in connection with guardians of minors' estates.

#### **ENVIRONMENTAL CONDITIONS:**

- Standard office conditions.
- Direct contact with diverse clientele
- Exposure to outside weather conditions and driving hazards

#### **KNOWLEDGE, SKILLS AND ABILITIES REQUIRED TO PERFORM ESSENTIAL FUNCTIONS:**

*The requirements listed below are representative of the knowledge, skill, and/or ability required to perform this job satisfactorily.*

- Knowledge of the legal system, principally state and local statutory requirements regarding guardianships of incapacitated persons and minors.
- Ability to read, analyze, and interpret statutes, local rules, or other governmental regulations as they relate to incapacitated persons.
- Ability to effectively describe, explain, and clarify procedures, regulations, standards, responsibilities and requirements of a guardian of the incapacitated person to attorneys, guardians, interested parties and supports, public or private sector organization representatives to achieve objectives mandated by the court.
- Ability to effectively present information and respond to departmental inquiries or questions from attorneys guardians, interested parties and supports, and public or private sector organization representatives.

- Ability to communicate professionally with a wide variety of people under various and often difficult circumstances.
- Ability to effectively gather and present information in one-on-one situations involving incapacitated persons, guardians, family members and other interested parties, attorneys, and public or private sector organization representatives.
- Ability to write reports and routine business correspondence.
- Ability to write descriptions, facts, and information in a manner suitable for use by others.
- Ability to analyze facts and exercise sound judgment in arriving at conclusions presented to the court and support finding with thorough research and documentation.
- Ability to review financial records and reports and apply knowledge of statutes and requirements in determining compliance with state statutory requirements and local rules or procedures regarding guardianships of estates of incapacitated persons.
- Ability to set priorities in case management, arranging and completing necessary visits, preparing and submitting investigative reports, and other work duties.
- Ability to gather, maintain, update and share public and private resource information.
- Ability to demonstrate knowledge of computer operations and proficiency in data entry and word processing.

#### **PREFERRED TRAINING AND OTHER REQUIREMENTS:**

- Must possess and maintain a valid Pennsylvania driver's license.
- Ability to navigate the city of Philadelphia.
- Knowledge of the principal investigative methods and techniques used to locate individuals.
- Knowledge of interviewing methods and techniques.
- Ability to follow oral and written instructions.
- Ability to learn the provisions, statutes, ordinances, codes, and regulations or standards as they apply to investigating.
- Ability to conduct investigations.
- Ability to maintain records and prepare reports.
- Ability to establish and maintain effective working relationships with associates and the public.
- Ability to communicate effectively both orally and in writing.
- Computer literate with the ability to learn and utilize computer software applications.
- Proficiency with Microsoft Word and Microsoft Outlook computer software.

#### **PHYSICAL STRENGTH REQUIREMENTS:**

- Ability to withstand outdoor weather conditions.
- Frequently required to sit, stand, and/or walk for extended periods of time.
- Ability to operate surveillance equipment.

The First Judicial District is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the First Judicial District will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective employees and incumbents to discuss potential accommodations with the employer.