

2025–2026

# Riverside County Civil Grand Jury Report



Office of the Public Guardian: How Well Do They  
Protect Riverside County's Most Vulnerable?

June 2, 2026

## SUMMARY

The 2025–2026 Riverside County Civil Grand Jury (Grand Jury) investigated whether heavy caseloads and other factors made it difficult for staff to visit conservatees as often as required. According to Public Guardian policy and *Suggested Industry Practices*, published by the California State Association of Public Administrators, Public Guardians, and Public Conservators (CA PA/PG/PC), the Public Guardian is required to meet in person with each conservatee at least once every ninety days.<sup>1</sup> The purposes of this requirement are to protect the vulnerable population served by the Public Guardian from neglect and to protect Riverside County from potential liability. During the Grand Jury’s investigation, evidence indicated that staff turnover in the department and extended leave led to heavier caseloads over the last twelve to fifteen months. This combined with other factors made it difficult for Public Guardian staff to meet in person with conservatees at least once every ninety days.

Although staff members testified that they always do their best to visit each conservatee in person once every ninety days, as required, evidence established that Public Guardian management currently does not have a consistent and systematic way to verify or track the number and timing of visits. The Grand Jury’s investigation also revealed that the Public Guardian uses computer software to document its work, and this computer software could be updated to track and verify in-person visits to ensure they are being completed as often as required. The Grand Jury’s investigation also revealed that restrictive scheduling could be eliminated to allow more time for in-person visits to be completed as often as required. In addition, a master calendar could be used to ensure that facilities that house multiple conservatees are visited at least once every ninety days.

The Grand Jury also learned during its investigation that staff members were required to remain in the office two working days per week for mandatory training that was ineffective, outdated, and took too much time away from other duties. Testimony indicated that mandatory training twice a week for experienced staff members was recently discontinued. However, the Grand Jury concluded that it would be beneficial for the Public Guardian to digitize some of its training. Public Guardian staff have a complex job that requires extensive training. As a result, turnover at the Public Guardian puts a heavy burden on Public Guardian management to train replacements and on deputies and other staff to fill in the gaps while new replacements are hired and trained. Some of this burden could be relieved by digitizing training that involves basic concepts and routine matters that are not subject to much change over time.

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<sup>1</sup> CA PA/PG/PC, *Suggested Industry Best Practices* (May 2017), <https://capagpc.org/wp-content/uploads/2018/CAPGPCPG-Best-Practices-May2017.pdf>, 31.

## BACKGROUND

The Public Guardian operates within the Behavioral Health Department of the Riverside University Health System (RUHS/BH). The Public Guardian's primary function is to act as the court-appointed conservator for individuals who are unable to properly care for themselves and/or who are unable to manage their own finances. Once appointed, a conservator is legally responsible to manage the conservatee's needs, such as health care, psychological services, legal and financial assistance, social services, living arrangements, and activities of daily living.

Deputy public guardians (deputies), who report to supervisory and management personnel, are responsible for managing conservatorship cases assigned by the court to the Public Guardian. The Public Guardian also employs support staff that contribute to the Public Guardian's role of caring for the needs of conservatees. These include investigators, case managers, nurses, clinical therapists, housing specialists, and administrative staff.

Deputies are separated into two distinct sections:

- (1) Deputies in the Probate Section generally manage cases involving adult conservatees who are typically elderly and cannot provide for their own personal needs due to dementia, cognitive impairment, brain injury, developmental disability, or other conditions that seriously impair their ability to care for themselves.
- (2) Deputies in the Lanterman-Petris-Short Act Section (LPS Section) generally manage cases involving individuals who cannot take care of their own personal needs because they are "gravely disabled" due to a mental health disorder and need mental health treatment.

In 2022, the Larson Report observed that, "The complexity of the cases is daunting. LPS clients with severe mental illness often cycle in and out of crises and medication regimes. Probate clients are frequently subject to abuse, neglect, and exploitation and have high demands for housing and health care. One estimate was that 70 percent of probate referrals to the Public Guardian are due to neglect, including self-neglect. The Public Guardian leadership reported that the incidence of financial exploitation is growing, which further impacts the degree of difficulty in the cases."<sup>2</sup>

The Probate Section and the LPS Section are each led by a supervising deputy public guardian (supervising deputy). According to the Larson Report, "Tasks of the [supervising deputy]

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<sup>2</sup> Larson LLP. (2022, June 24). *Report Regarding Riverside County Programs and Services for Children in Need*. Public Report submitted to the Riverside County Board of Supervisors. <https://kesq.b-cdn.net/2022/07/Attachment-Larson-LLP-Report-PUBLIC.pdf>, 116. See also [Attachment - Larson LLP Report PUBLIC.pdf](#). (Larson Report.)

position are to assign, supervise, and evaluate the work of staff engaged in the management of estates of disabled or legally incompetent persons; to personally perform the more difficult estate management work and to do other work as required.... Responsibilities include training, supervision, and reviewing the work of staff providing conservatorship services. Specifically, the role supervises and trains deputies in the methods and techniques of conservatorship procedures, estate investigation, and management.”<sup>3</sup>

The deputy position was described by Public Guardian management as a challenging job and a professional career that takes years to master. Testimony further indicated that the job is emotionally difficult and challenging.

The following is a chart outlining the main services provided by the Public Guardian to conservatees:

Agency Collateral	Family Collateral	Placements
Answer Objections Court Accounting	Final Distribution to Conservatee Termination	Process Private Insurance Claims Purchases
Appraisal Personal Property	Final Distribution to Executor	Release of Personal Property
Appraisal Real Property	Final Distribution to Private Admin	Renovation Crew Hire
Burial Arrangements	Final Distribution to Public Admin	Request Petition for Sale Real Property
Case Assignment	Freeze Bank Accounts	Respond to Questions Status of Case
Case Documentation	Inspection of Real Property	Secure Real Property
Cleanup Crew Hire	Interview Conservatee/Assessment	Selling Real Property
Cleanup Negotiation	Interview Other Agencies	SSI/Medical Appeals
Client Evaluation	Interview Proposed Conservatee	Status Change
Client Freeze Payments Change	Inventory Personal Property	Status of Case
Complete Referral for Appointment	Landscape & Maintenance Crew Hire	Tax Preparation
Conservatee Visits	Management Real Property for Sale	Transport Client to Doctor's Appointment
Consultation with Other Parties	Marshall Personal Property	Transport Personal Property to Warehouse
Court Appearance	Marshall Bank Accounts	
Cursory Search of Dwelling	Obtain & Review Medical Documentation	
Disposal of Unnecessary Trash		
Domestic Help Hire		
Eviction from Rental Property		

Deputies work a “9/80” schedule, which means they work nine-hour days but have every other Friday off. On Tuesdays and Thursdays, they are expected to remain in the office to complete paperwork and data entry, and to attend meetings and training sessions. This leaves Mondays, Wednesdays, and every other Friday to visit conservatees in person and to complete other conservatee business outside the office, such as banking and marshaling assets.

Based on information provided by Public Guardian management, the Probate Section is currently staffed with thirteen deputy positions, but a senior deputy position is vacant. The LPS Section currently has sixteen deputy positions, but six positions are vacant, including a senior deputy position. Testimony indicated that the two senior deputy positions have been open for an

<sup>3</sup> Larson LLP, *Larson Report*, 122.

extended period, but Public Guardian management has elected not to fill these positions by promoting an experienced deputy from within the office. This was cited in testimony as a source of declining morale.

The California State Association of Public Administrators, Public Guardians, and Public Conservators (CA PA/PG/PC) has indicated that “a maximum caseload of 30 cases per worker is necessary to ensure consistent quality client-centered case management.”<sup>4</sup> The Larson Report states that caseloads per deputy in 2022 were close to or over one hundred. As a result, the Larson Report recommended immediate action with respect to caseloads, stating that “the County should explore mechanisms to ensure that caseloads are consistently kept to a manageable level that does not rise above the maximum level of 1:60.” In addition, the Larson Report recommended that staffing levels be reduced to a maximum of 1:30 within two years.<sup>5</sup>

Public Guardian management claimed that each deputy in the Probate Section is responsible for approximately twenty-two conservatees. LPS Section deputies are each responsible for about seventy conservatees, except for one deputy who was recently hired and has a lighter caseload that will increase as training progresses. Caseloads in the LPS Section will be significantly reduced once vacant positions are filled and new deputies are trained. This information indicates that current staffing and caseloads have significantly improved since the Larson Report was completed in 2022, and that both the Probate Section and the LPS Section should be within established guidelines within the foreseeable future.

Contrary to the information provided by Public Guardian management, deputies in the Probate Section testified they had caseloads between thirty-eight and fifty-one clients. LPS deputies reported caseloads between eighty-eight and 118. The Grand Jury was also advised that caseloads in the LPS Section are typically higher than those in the Probate Section. Based on testimony, the preceding year had been a challenge as caseloads had to be increased because of turnover and at least one extended leave. Testimony also indicated that two deputies left at the same time and one was out on extended leave. In addition, testimony established that a supervising deputy was carrying a caseload of approximately 300 conservatees for a short period of time because of turnover. To deal with this difficult situation, management diverted calls and paperwork for these cases to temporary employees and obtained additional help from the long-term care team to make visits.

As stated in the Larson Report, “[a] ripple effect of problems occurs when staffing is inadequate. It is simply not possible to provide client-centered care to so many individuals with such

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<sup>4</sup> Larson LLP, *Larson Report*, 128, citing CA PA/PG/PC Fact Sheet, State Augmentation of County Operations for Public Administrator, Public Guardian, and Public Conservator Services, DRAFT, with other organizations that had not yet been confirmed; no date on Fact Sheet.

<sup>5</sup> Larson LLP, *Larson Report*, 131.

complex needs... . [H]igh caseloads lead to errors and inappropriate placements, thus harming clients.”<sup>6</sup>

Deputies and other members of Public Guardian staff use two separate computer software programs to track client information and document their work.

The first is a program created by Panoramic Software Corporation (Panoramic), which the company claims is “the leading case management and fiduciary accounting software tailored for Public Guardian agencies.”<sup>7</sup> The Panoramic software program is a cloud-based, “centralized platform” that is designed to simplify and help public guardian agencies track client information, manage financial accounts, and comply with court and regulatory reporting requirements.<sup>8</sup>

The second computer software program is commonly referred to as ELMR, an abbreviation for electronic management of records. ELMR is an electronic health record system that collects and maintains client demographics, patient health records, treatment information, and service data. ELMR is used for MediCal billing, which helps to recapture costs.

Deputies testified that documenting their case work in these two systems is time consuming and tedious. During the Grand Jury’s investigation, deputies testified that Panoramic is used more often and is relatively easy to use, but ELMR is not user-friendly. The two software programs are not compatible or integrated so that entries must be “duplicated” (*i.e.*, the same entries must be made separately in each system). One deputy testified data is first entered into Panoramic and then copied and pasted into ELMR and then it takes “thirty-two clicks” to complete the data entry into ELMR. It is unclear whether the data entry process in these programs could be integrated and streamlined to save time. After this information was provided, the Grand Jury learned that ELMR was recently updated and appears to be more user-friendly. One deputy estimated that data entry into Panoramic and ELMR can take up to 30 or 40 percent of a typical day in the office. Other testimony indicated the time spent on data entry is difficult to estimate because of the number of interruptions to the workday. When they are in the office, deputies said they are often called upon to “put out a lot of fires.”

## **METHODOLOGY**

The Grand Jury’s investigation and comprehensive review were conducted using the following methods:

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<sup>6</sup> Larson LLP, *Larson Report*, 127.

<sup>7</sup> Panoramic Software Corp. “Products.” Accessed March 30, 2026. <https://panosoft.com/products/pgpro/>.

<sup>8</sup> Panoramic Software Corp. “Products.” Accessed March 30, 2026. <https://panosoft.com/products/pgpro/>.

## **Anonymous Grand Jury Complaint**

### **Interviews and Testimonies:**

- Thirteen Public Guardian employees, including management
- Three Human Resources employees

**Multiple, Substantiated Complaints** made pursuant to Riverside County Board of Supervisors Policy No. C-25, Non-Discrimination and Anti-Harassment Policy and Complaint Procedure

### **Department Head Presentations:**

- RUHS Behavioral Health PowerPoint
- Executive Office Dashboard

### **Site Visits:**

- RUHS Arlington Campus
- Behavioral Health, Wellness Village
- Public Guardian Warehouse where conservatee belongings, keepsakes, and vehicles are stored

### **Prior Grand Jury Reports and Other Reports and Responses:**

- 2023–2024 Riverside County
- 2013–2014 Riverside County
- 2013–2014 Santa Clara County
- 2003–2004 Riverside County

### **County of Riverside Auditor-Controller Reports**

- 2025-319 Internal Audit
- 2024-017 Internal Audit
- Auditor-Controller response to 2023–2024 Grand Jury Report

### **Documents and Manuals:**

- Lanterman-Petris-Short Act (circa 1967) content
- Larson Report
- Public Guardian Policy/Procedures binder
- Public Guardian Training Module binder
- RUHS Behavioral Health organization charts
- County of Riverside, Deputy and Senior Deputy, Public Guardian job descriptions

### **Miscellaneous:**

- websites
- photographs
- news releases
- emails
- phone calls
- observations

## **DISCUSSION**

### **In-Person Visits to Conservatees**

Although some conservatees can remain in their own homes, most conservatees are housed in institutional settings, including assisted living homes; board and cares; nursing homes; mental health facilities; acute care hospitals; jails; state hospitals; rehabilitation facilities; hospice; and group homes.<sup>9</sup> Public Guardian management provided the Grand Jury with information indicating it is currently charged with the care of about 1,172 conservatees in many different cities and counties of California. Although conservatorship proceedings in these cases were initiated in Riverside County, there are not enough facilities for all conservatees to be housed here. Therefore, some conservatees are in Riverside County, but many conservatees are located as far south as National City in southern San Diego County, as far west as Long Beach in Los Angeles County, and as far north as Fresno County. Most of these facilities house more than one

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<sup>9</sup> Larson, LLP, *Larson Report*, 9; 137-138.

and as many as sixty-one conservatees, so it can take more than a single day to visit all conservatees who live in a facility. Deputies would sometimes need to stay in an out-of-town location for one or more nights to complete all the visits at a facility.

As noted above, deputies are expected to visit conservatees in person at least once every ninety days and as necessary.<sup>10</sup> One of the purposes of an in-person visit is “to develop a relationship of trust and to learn more about the wishes of the individual.”<sup>11</sup> Typically, multiple conservatees are housed at the same location and several deputies travel by car to the facilities together to streamline the visits. Additionally, deputies visit clients assigned to other deputies who are unable to make an out-of-town trip.

The Grand Jury was advised that deputies first meet with a representative when they arrive at a facility to discuss the charts of their conservatees and then meet face-to-face with each conservatee. During in-person visits, deputies are tasked with:

- protecting conservatee rights
- observing the conservatee’s physical appearance, frame of mind, and living conditions
- determining whether the conservatee’s needs for food, clothing, shelter, and health care are being met
- checking for the presence of wheelchairs, glasses, dentures, and other possessions
- assessing the need for more frequent visits.<sup>12</sup>

Generally, deputies allow about twenty-five to thirty minutes per conservatee when visiting a facility. If, for example, four deputies travel to National City, where thirty-six conservatees are housed, it would take a total of five hours of travel time in a ten-hour workday, about one hour for meal breaks, with four hours left for visiting. On this timetable, each deputy could complete four in-person visits, so only sixteen of thirty-six conservatees at this facility could be visited in a single day.

In-person visits are not only “essential for high quality client care,” they are also important for managing risk.<sup>13</sup> The Larson Report states that between 2017 and 2022, “at least four lawsuits [had] been filed against RUHS/BH/Public Guardian for cases in which a client was alleged to have been injured or died as a result of negligent care by a long-term care facility. For example, one suit alleged that a ‘severely mentally and physically disabled’ Public Guardian client ‘suffered physical injuries at the... . . . Home for which the County is legally responsible.’

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<sup>10</sup> Larson LLP, *Larson Report*, 9, 145, citing the CA PA/PG/PC *Best Practices* guide; Training Module No. 7. Training Module No. 7 also sets forth criteria for determining whether more frequent visits are necessary.

<sup>11</sup> PUBLIC GUARDIAN Training Manual No. 7.

<sup>12</sup> PUBLIC GUARDIAN Training Manual No. 7; Larson LLP, *Larson Report*, 143-144.

<sup>13</sup> Larson LLP, *Larson Report*, 141.

Another ‘seeks to investigate a brain injury that occurred to her mother while she was a resident at . . . Home.’”<sup>14</sup> Based on its investigation of the Public Guardian, which included interviews of deputies, the Larson Report questioned whether visits were “frequent enough” because of high caseloads and other factors. In this regard, the Larson Report stated that “seeing a cognitively impaired client in a nursing home every ninety days seems unlikely to build a solid relationship and an understanding of the role. Visits should be consistent enough, and thorough enough to build trust.”<sup>15</sup>

All deputies who were interviewed acknowledged the importance of in-person visits as opposed to visits using a video conferencing system, as these do not give them “the full picture” that would be visible at the facility. However, most deputies testified it is a struggle to visit all their assigned conservatees once every ninety days as required but do the best they can. Based on the number of cases assigned to them at the time, more than one deputy testified it is simply not possible to make the required number of visits. They encouraged the Grand Jury to “do the math” based on the following factors:

- their 9/80 work schedule
- other work responsibilities
- the actual number of assigned cases
- the restrictive schedule which only permits travel outside the office on Mondays, Wednesdays, and every other Friday
- travel times to the various facilities where conservatees are housed
- the complexity of cases
- the amount of time spent in training sessions and other meetings

Deputies have seventy-two hours after an in-person visit with a conservatee to add a progress note about the visit in Panoramic. To do so, a deputy must open the conservatee’s file in Panoramic, type in the purpose of the visit, and enter a few sentences about the status of the conservatee that were learned during the visit.

To assess whether deputies are visiting their assigned conservatees at least once every ninety days, as required, the Grand Jury requested that the Public Guardian produce a report from Panoramic showing the dates when each conservatee was visited by deputies over the previous fifteen months. In response, the Grand Jury was advised by management that Public Guardian is currently unable to produce such a report, because in-person visits by deputies are not specifically tracked by Panoramic at this time. However, the Public Guardian did produce information listing the various facilities/cities where conservatees are housed, along with the

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<sup>14</sup> Larson LLP, *Larson Report*, 142.

<sup>15</sup> Larson LLP, *Larson Report*, 123-124, 127, 146, 149

number of conservatees housed at each facility. The Grand Jury was also given information showing that the Public Guardian is currently responsible for 1,172 conservatees. Based on this information, the total number of face-to-face or in-person visits over the last fifteen months should be approximately 5,860. However, Public Guardian management was only able to confirm a total of 967 face-to-face visits over the last fifteen months.

Two possible reasons were offered by Public Guardian management as to why the number of visits on the chart is low in comparison to the total number of current conservatees. First, it is possible deputies are not correctly entering data into Panoramic. Second, deputies may be making visits without documenting them in Panoramic at all. It is also apparent that in-person visits are not taking place as often as required.

Essentially, supervisors assess whether deputies are visiting conservatees as often as required based on a rudimentary “honor system.” Deputies meet regularly with their supervisors to review their respective files and lists of assigned conservatees. During these meetings, deputies would be expected to discuss the status of each case and when the last visit occurred. Supervisors do not take steps to verify whether in-person visits are occurring as frequently as required unless they have reason to believe a deputy is struggling to keep up with the requirements of the job.

There are two ways the supervisor can verify whether the required in-person visits are taking place, but these methods are cumbersome. First, the supervisor can make telephone calls to the facilities where conservatees are housed to ask whether the deputy has been seen at the facility and can also ask to see the visitor logs. Second, the County has added a GPS feature to vehicles being used to make in-person visits, so a supervisor can find out where a vehicle went on a particular day. Additionally, Public Guardian management testified there are “multiple sets of eyes on a case.” As noted above, other staff members, such as nurses and case managers, make specialized and limited in-person visits to conservatees. The Public Guardian also receives feedback in telephone calls and notes from conservatees and their family members. In short, the Grand Jury found that in-person visits are not regularly or consistently tracked and assessed in a systematic manner. While it is true that “multiple sets of eyes” may be effective in uncovering problems, the lack of a more thorough and systematic approach leaves our most vulnerable citizens at risk of “falling through the cracks.”<sup>16</sup>

The Grand Jury learned from Public Guardian management and from a telephone conversation with a Panoramic representative that the Panoramic software is customizable and could potentially be updated to specifically track and report in-person visits by deputies. Management

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<sup>16</sup> See, e.g., Larson LLP, *Larson Report*, at 126 (“[A]ggregate numbers are essential for analyzing trends and planning strategically. The 2020 national public guardian study urged that ‘public guardianship programs should maintain and regularly analyze key data about clients and cases.’”)

and supervisors would then be able to review reports on a regular basis to better assess whether individual deputies are able to complete in-person visits as required. Such a change is imperative to making sure conservatees are visited as often as required.

### **Training New Deputies**

Once again, factors such as turnover, long-term leave, restrictive scheduling, other work responsibilities, travel times, the complexity of cases, and the time necessary to train new deputies can have a significant impact on the Public Guardian's ability to effectively complete in-person visits and other necessary services to conservatees. As mentioned above, turnover together with long-term leave can mean that caseloads per deputy must be temporarily increased to unacceptable levels to fill in the gaps.

Management indicated a belief that turnover is a continual challenge but is not higher than other workplaces. Factors impacting turnover include competition from other, better-paying jobs within commuting distance of Riverside and competition from telehealth jobs as the Public Guardian has a need for deputies to work outside the home. Additionally, they hire people who are relatively early in their careers, so they tend to move around looking for a good fit. Sometimes people leave because the job is a difficult one for many reasons, and they realize it is not a good fit for them. Testimony and substantiated complaints produced during the Grand Jury's investigation further indicate that ongoing problems with low morale due to poor treatment of staff by members of Public Guardian management may also be related to high turnover in the last twelve to fifteen months.

Public Guardian management currently trains new deputies based on twenty-seven well-organized training modules that are housed in a notebook that is approximately five inches thick. According to management, the training starts with basic, key concepts and then orients new deputies to a "conceptual framework as to where they can go for help, knowing that even those who have been doing the job for a number of years cannot memorize everything." One of the key steps is "knowing one's resources" (e.g., where to go to get questions answered). Some searchable sources are also available digitally, such as the Public Guardian's policies and procedures manual. New deputies also have an opportunity to shadow experienced deputies, and they start with a small caseload that is increased over time as training progresses.

Supervising deputies do most of the training by sitting down with one or more new deputies and going over the training modules one at a time over the course of a new employee's first year of service. In other words, every time someone is hired as a deputy, there is a lot to learn, and supervising deputies must spend a significant amount of time away from other responsibilities to train new deputies. Supervising deputies also get involved when a more experienced deputy needs refresher training or skills reinforcement. Currently, supervising deputies do have some

help with their training responsibilities. Two retirees returned to the Public Guardian on a temporary basis to help with training and other routine tasks, such as closing out cases.

During the Grand Jury's investigation, deputies testified that the quality, effectiveness, and efficiency of training needs improvement. Some also indicated a belief that the quality of training is a factor in the turnover rate, and they stressed the importance of being able to shadow a more experienced deputy in the field. They said they witnessed new deputies being sent out into the field without enough time to shadow senior deputies and without the foundational training they need to do the job. Then, they often do not feel supported and are reluctant to bring up problems. For example, the Grand Jury was told that management might scold them for not doing something quickly enough without finding out why the task is taking so long. When new deputies do not feel supported, they may start looking for a new job. It therefore appears that more effective and efficient training could decrease turnover.

Deputies also observed that new deputies with backgrounds in social services, case management, and hospital work can learn the job faster, but others need more time. Determining priorities and scheduling and managing caseloads are some of the main challenges faced by new deputies, and supervising deputies often do not have time to sit with new deputies to work on these skills. As noted above, deputies are expected to be in the office on Tuesdays and Thursdays. For a time, deputies said there were mandatory training sessions on Tuesdays from 2 to 4 p.m. and/or on Thursdays from 1 to 5 p.m. The training sessions were mandatory regardless of experience level but were generally geared toward newer deputies. During the training, materials were simply read to them without time for discussion or questions, and more experienced deputies said they did not feel like they were learning anything. Some of the materials that were read to them were out of date. These training sessions took away from the time they needed for other tasks, including in-person visits to conservatees. However, deputies testified that management eventually cancelled these training sessions without explanation.

Public Guardian management members told the Grand Jury they are always thinking about ways to do things more efficiently and would never want to do something in a harder way if there is an easier way to do it. For example, they are considering ways they could take large pieces of material and make them more searchable and useable for employees. They also have available a small training crew known as workforce education and technology professionals, and have previously used them to provide some training. These professionals might be able to provide feedback to Public Guardian management to determine whether there are ways to make training more efficient.

Based on the Grand Jury's investigation, training at the Public Guardian can generally be separated into types. First, general department training that everyone receives is typically on a digital platform. This digital training covers topics such as information safety, harassment, and

cultural competence. Some specialized online training is also available for deputies through CA/PA/PG/PC. Second, the job of deputy involves a fair amount of paperwork, so part of the training is best done hands-on, using examples of forms and showing new deputies how to fill them out correctly. Third, there are tasks and services that are best learned in the field by shadowing more experienced deputies, and organizational and scheduling skills that are best learned by sitting down with an experienced supervising deputy.

Finally, it appears there is additional training on basic concepts and routine matters that are not subject to much change over time that could be digitized with the help of workforce education and technology professionals. This digitized training could be made available for training new deputies and to more experienced deputies who might need refresher training or skills reinforcement. Digital training could be tracked to ensure that all new deputies finish the training. If a significant amount of deputy training could be digitized, it would take some of the time pressure of training away from supervising deputies and allow them to spend more time on other tasks.

## **CONCLUSION**

The Grand Jury commends all individuals employed by the Public Guardian who are dedicated to serving the needs of our most vulnerable citizens. The investigation by the Grand Jury, which included interviews and site visits, revealed that the Public Guardian is staffed with many compassionate individuals who are devoted to the vulnerable populations they serve and who do their best every day to provide a high level of client-centered care to conservatees. These individuals are entitled to a workplace that provides them with the time and resources they need to do their jobs effectively and to benefit conservatees. Based on the Grand Jury's investigation, the Public Guardian must take the additional steps outlined in this report to ensure that new and experienced deputies have the time and resources they need to visit each conservatee in person at least once every ninety days.

## **FINDINGS**

**F1.** 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.

**F2.** 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.

**F3.** 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.

**F4.** 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.

**F5.** 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.

**F6.** 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.

## **RECOMMENDATIONS**

**R1.** 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.

Based on Findings: F1, F2

Implementation Date: June 30, 2027

Fiscal Impact: Moderate

**R2.** 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.

Based on Findings: F1, F2, F3

Implementation Date: December 31, 2026

Fiscal Impact: Minimal

**R3.** 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.)

Based on Finding: F4

Implementation Date: October 30, 2026

Fiscal Impact: None

**R4.** 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.

Based on Finding: F5, F6

Implementation Date: June 30, 2027

Fiscal Impact: Moderate

**REQUIRED RESPONSES**

California Penal Code §§ 933 and 933.05 outline the parameters within which governing bodies are required or permitted to respond. Governing bodies have ninety days to respond to Grand Jury report findings and recommendations. Elected officials have sixty days to respond to Grand Jury reports. Both governing bodies and elected officials must submit their written responses to the Grand Jury report findings and recommendations to their county’s presiding judge.

<b>90-Day Responses</b>	<b>Findings</b>	<b>Recommendations</b>
Riverside County Board of Supervisors	F-1 through F-6	R-1 through R-4

**INVITED RESPONSES**

<b>60-Day Responses</b>	<b>Findings</b>	<b>Recommendations</b>
California Health & Human Services Agency	F-1 through F-6	R-1 through R-4
Behavioral Health Department of the Riverside University Health System	F-1 through F-6	R-1 through R-4
Office of the Public Guardian	F-1 through F-6	R-1 through R-4

## **DISCLAIMER**

Reports issued by the Grand Jury do not identify individuals interviewed. Penal Code section 929 requires that reports of the Grand Jury not contain the name of any person or facts leading to the identity of any person who provides information to the Grand Jury.

Report Issued Date: 6-11-2026  
Report Public Date: 6-16-2026  
Report Due Date: 9-16-2026