

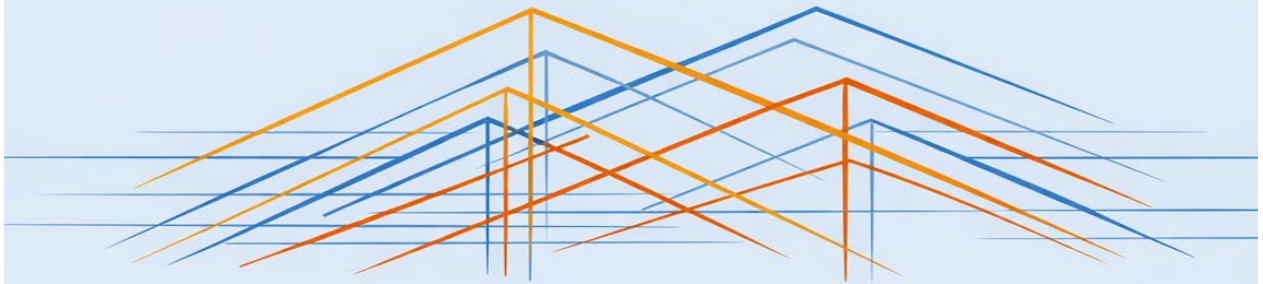
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OFFICE OF THE PUBLIC ADMINISTRATOR / PUBLIC GUARDIAN

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# When No One Else Is Left

Operations, Oversight, and Accountability



San Diego County Civil Grand Jury  
2025-2026 Term

**San Diego County Civil Grand Jury**

**Office of the Public Administrator / Public Guardian  
A Review of Operations, Oversight, and Accountability  
2025–2026 Term**

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**Prepared by:**

**San Diego County Civil Grand Jury  
Acting under the authority of the California Penal Code §§ 925–933.6 <sup>1</sup>**

**Submitted to:**

**The Honorable Presiding Judge of the Superior Court  
County of San Diego**

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**Date of Issuance: 2026**

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**Summary**

When individuals die without family or become unable to care for themselves, the County of San Diego steps in through the Office of the Public Administrator/Public Guardian (PA/PG)<sup>1</sup>. The office manages final affairs, protects personal and financial interests, and provides court supervised oversight for people who would otherwise have no one to act on their behalf. Much of this work occurs quietly, but its impact on individuals, families, and the justice system is significant.

The Office of the Public Administrator/Public Guardian (PA/PG) is responsible for protecting and managing the estates of decedents and assisting individuals who are unable to make decisions regarding their personal or financial affairs.<sup>2</sup> The Public Guardian serves as a court-appointed conservator for individuals determined by the court to be unable to care for themselves or manage their assets, including older adults and other vulnerable individuals at risk of abuse or neglect.<sup>3</sup>

Recognizing the responsibility entrusted to the Office of the Public Administrator/Public Guardian (PA/PG), the San Diego County Civil Grand Jury conducted a system-level review of the office's operations, oversight, and administrative practices. The inquiry examined whether the office is structured and supported in a way that allows it to meet its responsibilities consistently and effectively as service demands evolve.<sup>4</sup>

The Civil Grand Jury found that the Office of the Public Administrator/Public Guardian (PA/PG) operates under sustained pressure from growing and increasingly complex caseloads.<sup>5</sup> Staff must balance time-sensitive legal requirements with intensive case oversight, often while navigating administrative processes that are not fully standardized and experiencing periods of staffing instability.<sup>6</sup> While judicial oversight ensures compliance in individual cases, county leadership lacks a consolidated, program-level view of overall performance.<sup>7</sup> In addition, limited public understanding of the office's legal role and continued reliance on legacy technology systems affect efficiency and long-term planning.<sup>8</sup>

These conditions reflect interrelated system-level challenges rather than isolated shortcomings. Available information suggests that staffing levels are influenced in part by budgetary constraints and may not always be fully aligned with operational demand. Workflow consistency, institutional knowledge, public-facing guidance, performance monitoring, and technology infrastructure collectively influence how effectively the Office of the Public Administrator/Public Guardian (PA/PG) can carry out its statutory responsibilities.

Based on these findings, the Civil Grand Jury recommends that the County, through the Health and Human Services Agency (HHS), coordinate actions to strengthen operational foundations. These actions include aligning staffing with workload demands, standardizing administrative processes, preserving institutional knowledge, improving public information and referral guidance, strengthening program-level performance monitoring, and modernizing technology systems. Taken together, these steps support accountability and help ensure that the Office of the Public Administrator/Public Guardian (PA/PG) remains able to serve individuals who rely on the County when no other responsible party is available.

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## **Background**

The Office of the Public Administrator/Public Guardian (PA/PG) performs two related but legally distinct functions. The Public Administrator is authorized under the California Probate Code to administer estates when no executor, administrator, or eligible heir is

available.<sup>9</sup> The Public Guardian provides court-appointed conservatorship and guardianship services for individuals who are unable to manage their personal or financial affairs due to mental illness, cognitive impairment, or other legally recognized conditions. The Office of the Public Administrator/Public Guardian operates within the County's Health and Human Services Agency (HHSA), providing estate administration and protective services for deceased or incapacitated individuals who lack suitable private representatives.<sup>10</sup>

The Public Administrator role in California dates to the nineteenth century, when state law required counties to designate officials to manage estates lacking responsible representatives.<sup>11</sup>

In San Diego County, these two statutory functions were consolidated within a single office. The Office of the Public Administrator/Public Guardian now operates as a division of the County's Health and Human Services Agency (HHSA), providing estate administration and protective services for deceased or incapacitated individuals who lack suitable private representatives.<sup>12</sup>

In its role as Public Administrator, the office is responsible for identifying estate assets, securing and, when appropriate, liquidating property, satisfying lawful debts, and distributing remaining assets in accordance with court orders and state probate law.<sup>13</sup> In its role as Public Guardian, the office petitions the Superior Court for conservatorship when statutory criteria are met and, once appointed, assumes responsibility for managing the personal and financial affairs of conservatees under ongoing judicial oversight.<sup>14</sup>

The office employs professional staff, including deputies, case managers, investigators, and administrative personnel, to carry out these responsibilities.<sup>15</sup> Oversight of estate and conservatorship matters is provided by the Superior Court, with additional accountability requirements established through applicable state statutes and county administrative policies.<sup>16</sup>

This background establishes the statutory framework, organizational placement, and core operational responsibilities of the Office of the Public Administrator/Public Guardian (PA/PG). With this foundation in place, the report now turns to information gathered through interviews, document review, and workflow analysis. The facts that follow present the objective conditions observed by the Civil Grand Jury and form the evidentiary basis for the findings and recommendations that conclude this report..

The analyses, interpretations, and assessments presented in this report reflect the Grand Jury's professional judgment based on a review of publicly available information and the research process described herein. Factual statements are drawn from verifiable sources and are cited where appropriate. Evaluative statements, findings, and recommendations reflect reasoned interpretations of the documented record and are offered to inform consideration, not to assert definitive conclusions beyond the available evidence.

This assessment acknowledges that alternative interpretations of the same record may exist. The Grand Jury has sought to present conclusions that are reasonable,

transparent, and traceable to disclosed sources, while identifying known limitations and areas requiring further verification.

## **Scope and Method of Inquiry**

The San Diego County Civil Grand Jury initiated this inquiry to determine whether the Office of the Public Administrator/Public Guardian (PA/PG) operates in compliance with applicable state law, county policy, and administrative requirements, and to assess how effectively the office carries out its fiduciary and protective responsibilities.<sup>17</sup> The inquiry focused on the administrative, operational, and oversight frameworks that govern the office's routine functions.

This report relied primarily on publicly accessible, primary source materials. Source categories included applicable statutes and regulations, adopted County of San Diego budgets and financial documents, publicly available organizational charts and administrative records, court rules and procedural guidance, and official reports issued by government agencies or oversight bodies. Where relevant, secondary sources were used solely to provide context and were cross-checked against primary documentation.

Information was collected using a structured review process designed to support verification and replication. Sources were selected based on relevance to the scope of the inquiry, public availability, and currency within the defined review period. When multiple sources addressed the same subject matter, information was compared across documents to confirm consistency. Items that could not be corroborated through at least one

additional independent source were excluded from the evidentiary record or flagged for further verification. This methodology prioritized transparency, traceability, and the use of materials that can be independently accessed and reviewed by third parties.

The scope of the review included an examination of the office's administration of decedents' estates, its procedures for initiating and managing court-ordered conservatorships, and its coordination with the Superior Court, County Counsel, and other divisions within the HHSA. The Grand Jury also evaluated the PA/PG's interactions with external entities, including hospitals, law enforcement agencies, and community organizations involved in the referral, care, or protection of individuals determined to lack capacity. This review also included an examination of selected case documentation and internal procedures to understand workflow practices, case processing, and administrative controls.

## **Confidentiality Constraints**

Certain information relating to individual cases and client records was restricted by confidentiality laws, including provisions of the California Welfare and Institutions Code and the California Probate Code.<sup>18</sup> These protections limited the Civil Grand Jury's ability to review individual client details but did not impede its broader assessment of policy, procedure, and administrative oversight.

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## Discussion

The Office of the Public Administrator/Public Guardian (PA/PG) operates at the intersection of statutory obligation, administrative complexity, and human vulnerability. Its dual responsibilities of administering estates in the absence of private representatives and serving as court-appointed conservator for individuals who lack capacity require both technical precision and sustained oversight. The Civil Grand Jury's review indicates that the effectiveness of this office is shaped less by isolated deficiencies than by the interaction of staffing requirements, administrative processes, public understanding, oversight structures, and technology infrastructure.

Caseload growth and increasing case complexity place sustained pressure on staffing resources. Estate administration and conservatorship matters require extensive documentation, coordination with the courts, and, in many cases, intensive personal oversight. When staffing levels are not periodically reassessed against workload demands, the ability to maintain timely processing and consistent case management may become constrained. The absence of a recent, data-driven workload analysis limits the County's capacity to anticipate resource needs, evaluate staffing distribution, and plan for future demand.<sup>19</sup>

Administrative efficiency within the Office of the Public Administrator/Public Guardian (PA/PG) is influenced by the need to coordinate across multiple county departments and external entities. Estate and conservatorship cases require a sequence of actions involving the Superior Court, County Counsel, and other divisions within the Health and

Human Services Agency (HHS). Where workflows are not fully documented or standardized, administrative tasks may be delayed, duplicated, or handled inconsistently. Over time, reliance on informal knowledge and workarounds can increase operational variability and complicate training and supervision.<sup>20</sup>

Staffing stability and institutional knowledge play a critical role in mitigating these pressures. The Office of the Public Administrator/Public Guardian (PA/PG)'s work relies on specialized expertise in probate law, conservatorship procedures, and court practices, knowledge that is often developed through experience rather than formal instruction. Turnover, retirements, or extended vacancies can disrupt continuity, redistribute workload unevenly, and increase reliance on individual staff experience. Without structured approaches to knowledge preservation and succession planning, the office's ability to maintain consistent practices during staffing transitions may be diminished.

The effectiveness of the Office of the Public Administrator/Public Guardian (PA/PG) is also shaped by how well its statutory role is understood by the public and by entities that regularly interact with vulnerable individuals. Referrals originate from hospitals, law enforcement agencies, courts, and community organizations, yet eligibility for PA/PG involvement is narrowly defined by law. Inconsistent understanding of the office's authority and referral criteria can result in incomplete or inappropriate referrals, requiring additional staff time to clarify jurisdiction, request supplemental information, or redirect cases. These inefficiencies may affect the timeliness of intake and divert resources from active case management.<sup>21</sup>

Oversight mechanisms further influence program performance. Judicial review provides essential case-level accountability and ensures compliance with statutory requirements. However, court oversight alone does not provide a comprehensive view of program-wide trends, workload pressures, or operational efficiency. The absence of standardized performance measures and consolidated reporting limits county leadership's ability to evaluate how the Office of the Public Administrator/Public Guardian (PA/PG) functions as an integrated program rather than as a collection of individual cases.<sup>22</sup>

Underlying many of these issues are technology limitations. The continued use of legacy systems that are not fully integrated with the County's broader information technology infrastructure constrains data accuracy, reporting capacity, and transparency. Manual data entry and parallel recordkeeping among primary stakeholders increase administrative burden and limit the office's ability to produce timely, consolidated information needed for oversight and planning. Without a prioritized integration strategy, opportunities to improve efficiency and performance monitoring may remain limited.<sup>23</sup>

Taken together, these conditions point to the need for coordinated, system-level responses rather than isolated corrective actions. Aligning staffing with workload demands, standardizing administrative processes, preserving institutional knowledge, improving public-facing guidance, strengthening performance monitoring, and integrating technology systems are interrelated steps. Addressing these areas in a structured and deliberate manner would support the PA/PG's ability to meet its statutory responsibilities while adapting to evolving service demands.

Accordingly, the Civil Grand Jury recommends that the County, through the Health and Human Services Agency (HHSA) and in coordination with relevant departments, undertake a series of measured actions. These actions include conducting a comprehensive workload and staffing analysis, documenting and standardizing administrative workflows, implementing strategies to support staffing stability and knowledge retention, improving public information and referral guidance, establishing a framework for program-level performance monitoring, and developing a prioritized plan to integrate the Office of the Public Administrator/Public Guardian (PA/PG)'s systems into the County's technology infrastructure.

Collectively, these actions are intended to enhance operational efficiency, support accountability, and help ensure that the Office of the Public Administrator/Public Guardian (PA/PG) remains equipped to consistently serve the County's most vulnerable individuals in a legally sound manner.

### **Workload Growth and Staffing Capacity**

Information reviewed by the Civil Grand Jury indicates that the volume and complexity of Office of the Public Administrator/Public Guardian (PA/PG) cases are influenced by demographic trends, housing instability, aging populations, and increased interaction with medical and law enforcement systems.<sup>1</sup> Estate administration and conservatorship cases frequently require extensive investigation, documentation, and court interaction, often under compressed timelines. As caseloads increase or fluctuate, staffing levels

that do not adjust accordingly may place pressure on case processing timelines and staff workload.<sup>24</sup>

When staffing capacity does not align with service demand, delays may occur in estate administration, court filings, and conservatorship oversight. These delays may affect court schedules, prolong asset management responsibilities, and extend the duration of conservatorships, all of which carry legal, fiscal, and human implications. The Civil Grand Jury's review suggests that workload demands are not consistently matched by formal, data-driven staffing assessments, such as time studies, limiting the County's ability to anticipate or respond proactively to service pressures.<sup>25</sup>

### **Administrative Processes and Interdepartmental Coordination**

The Office of the Public Administrator/Public Guardian (PA/PG) operates within a broader county framework that includes the Superior Court, County Counsel, divisions of the Health and Human Services Agency (HHSA), and external partners such as hospitals and law enforcement agencies.<sup>1</sup> Effective performance depends on timely information exchange, consistent documentation, and coordinated workflows across these entities. The Civil Grand Jury observed that administrative processes involving multiple departments may introduce delays when responsibilities are not clearly defined or when information systems do not align.<sup>26</sup>

Case accuracy and efficiency depend heavily on the quality of intake information, documentation standards, and internal review processes. When administrative steps are

duplicated, manually intensive, or fragmented across systems, the risk of delay or error may increase. While individual staff may compensate through experience and informal coordination, reliance on such workarounds can obscure systemic inefficiencies and limit institutional resilience. Staffing Stability and Institutional Knowledge

The Office of the Public Administrator/Public Guardian (PA/PG)'s work relies not only on specialized knowledge of probate law, conservatorship procedures, court practices, and county policy, but also on sustained, case-specific relationships developed between case managers and the individuals they serve. Over time, assigned case managers often become the primary point of continuity for highly vulnerable individuals, developing a detailed understanding of personal history, medical needs, behavioral patterns, family dynamics, and court-ordered requirements. This familiarity can foster trust, facilitate compliance, and support informed decision-making in complex and sensitive matters.

Staffing turnover, whether due to retirement, vacancy, reassignment, or other budget-driven changes, can disrupt this continuity. When an experienced case manager departs, the loss extends beyond procedural knowledge. Established trust may be interrupted, and remaining or newly assigned staff must reconstruct both the factual and relational foundations of the case. The Civil Grand Jury learned that rebuilding this rapport is often a lengthy process, particularly for individuals with cognitive impairments, serious mental illness, or a history of trauma, for whom consistency and familiarity are especially important.

The Civil Grand Jury learned from leadership that reassignment following turnover may temporarily affect case management effectiveness, as replacement staff must review

extensive records, reestablish communication with courts and service providers, and earn the confidence of the individual under conservatorship.<sup>1</sup> During this transition period, case progress may slow, oversight demands may increase, and remaining staff may experience additional workload pressures as they support both existing cases and onboarding responsibilities.

The Civil Grand Jury's review suggests that institutional knowledge and relationship continuity function as interdependent assets within the Office of the Public Administrator/Public Guardian (PA/PG). In the absence of formalized knowledge-transfer mechanisms, structured succession planning, or standardized documentation practices that capture both procedural and case-specific insights, staffing turnover may lead to increased variability in case management quality, decision-making consistency, and client outcomes.

## **Public Understanding and Referral Pathways**

The Office of the Public Administrator/Public Guardian (PA/PG)'s statutory authority is narrowly defined and may be misunderstood by the public and external referral sources. Hospitals, law enforcement agencies, and community-based organizations often encounter individuals who present complex medical, behavioral health, or social needs and who appear to require immediate intervention. However, not all such individuals meet the legal thresholds for PA/PG involvement under probate or conservatorship statutes.<sup>27</sup>

The Civil Grand Jury learned that, in some instances, referrals to the Office of the Public Administrator/Public Guardian (PA/PG) may be influenced less by statutory eligibility than by operational pressures faced by external agencies, including the need to resolve complex cases, discharge individuals from care settings, or close pending matters.<sup>1</sup> This practice, sometimes described in external contexts as “patient dumping,” may result in referrals of individuals whose circumstances fall outside the PA/PG’s legal mandate. Such referrals may place additional strain on PA/PG staff, who must conduct intake reviews, clarify jurisdictional limits, and redirect cases while urgent needs remain unresolved.<sup>28</sup>

The Civil Grand Jury’s review indicates that these misaligned referrals may lead to delays in appropriate services for affected individuals, inefficiencies in case processing, and increased administrative workload for Office of the Public Administrator/Public Guardian (PA/PG) personnel. Staff time is often diverted toward assessing ineligible cases, communicating limitations to referring entities, and managing expectations in time-sensitive situations.

Clear, accessible, and consistently communicated public guidance regarding the Office of the Public Administrator/Public Guardian (PA/PG)’s role, statutory limitations, and referral criteria is essential to promote appropriate utilization of services. Improved understanding among external partners may reduce inappropriate referrals, support more effective interagency coordination, and help ensure that individuals are directed to the appropriate level of care and legal intervention without unnecessary delay.

## **Oversight, Accountability, and Performance Measurement**

Oversight of the Office of the Public Administrator/Public Guardian (PA/PG) occurs primarily through the Superior Court, which reviews probate and conservatorship matters on a case-by-case basis.<sup>29</sup> While judicial oversight ensures legal compliance, it does not necessarily provide county leadership with a comprehensive view of program performance, workload trends, or operational efficiency.

The Civil Grand Jury found that accountability mechanisms are primarily oriented toward compliance rather than outcome-based performance. Without consolidated reporting on caseloads, processing times, staffing ratios, and system-wide trends, county leadership may lack the information necessary to evaluate whether resources are aligned with statutory responsibilities and community needs.

## **Technology Systems and Data Integration**

The Office of the Public Administrator/Public Guardian (PA/PG) relies on administrative and case management systems to track estates, conservatorships, and related activities. These systems operate in siloed, non-integrated environments that are not fully aligned with broader County technology platforms. As a result, data accuracy, reporting capacity, and transparency may be constrained.<sup>30</sup>

The continued use of siloed systems necessitates manual data entry and parallel recordkeeping, increasing administrative workload and limiting the office's ability to produce timely, reliable, program-level performance information.<sup>31</sup> The Civil Grand Jury's review indicates that these technology limitations affect not only internal efficiency but

also the County's capacity to evaluate PA/PG program effectiveness. Without integrated systems, efforts to assess staffing needs, monitor operational trends, or respond to oversight inquiries may require labor-intensive data compilation rather than routine, standardized reporting.

## **Systemic Implications**

Taken together, these factors illustrate that the effectiveness of the Office of the Public Administrator/Public Guardian (PA/PG) is shaped less by isolated factors than by the interaction among staffing capacity, administrative processes, public understanding, oversight structures, and technology infrastructure. Incremental improvements in one area may be constrained if related systems remain unchanged. Addressing these issues in a coordinated manner is therefore essential to ensuring that the office can continue to meet its statutory obligations while responding to evolving service demands.

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## **Facts & Findings & Recommendations**

### **Facts 1:**

- The Office of the Public Guardian (PG) administers both estate and conservatorship cases as part of its statutory responsibilities under California law.<sup>32</sup>
- Publicly available county records and information reviewed by the Civil Grand Jury indicate that the number of estate administration and conservatorship cases handled by the PA/PG has increased over time.<sup>33</sup>

- The average number of cases assigned per deputy or case manager has increased over the past decade.<sup>34</sup>
  - Deputies and case managers are responsible for both administrative tasks, including court filings and compliance reporting, and direct case oversight activities required for estate administration and conservatorship management.<sup>35</sup>
  - Conservatorship cases frequently require time-intensive monitoring, coordination with service providers, and ongoing court interaction.
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### **Finding 1:**

The Office of the Public Guardian is operating under sustained workload pressures 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 resource allocation decisions.

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### **Facts 2:**

- The Office of the Public Administrator/Public Guardian (PA/PG) relies on coordination with multiple county entities, including the Superior Court, County

Counsel, and divisions within the Health and Human Services Agency (HHSA), to carry out its statutory duties.<sup>36</sup>

- Estate administration and conservatorship cases require the timely exchange of information, documentation, and approvals across these entities to meet court and statutory requirements.<sup>37</sup>
- Information reviewed by the Civil Grand Jury indicates that PA/PG administrative processes involve multiple sequential steps, including intake, investigation, court filings, asset management actions, and ongoing reporting.<sup>38</sup>
- Some administrative tasks require manual data entry, document preparation, or coordination across departments that use different procedures or systems.<sup>39</sup>
- Delays in receiving information or approvals from internal or external entities can affect the timing of court filings, case progression, and completion of estate or conservatorship actions.<sup>40</sup>
- The Civil Grand Jury found no consolidated, countywide process map or formal protocol that documents end-to-end workflows for PA/PG cases across all involved departments.<sup>41</sup>

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## **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.

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**Facts 3:**

- The Office of the Public Administrator/Public Guardian (PA/PG) relies on professional staff, including deputies, case managers, investigators, and administrative personnel, to carry out estate administration and conservatorship functions.<sup>42</sup>
  - PA/PG positions require specialized knowledge of probate law, conservatorship procedures, court practices, and applicable county policies.<sup>43</sup>
  - Effective performance of PA/PG duties depends on staff familiarity with complex, long-term cases and established procedural requirements.<sup>44</sup>
  - Information reviewed by the Civil Grand Jury indicates that staff turnover, retirements, or extended vacancies have occurred within the PA/PG during the period under review.<sup>45</sup>
  - When experienced staff leave their position or when positions remain vacant, case assignments and responsibilities are redistributed among remaining personnel.<sup>46</sup>
  - The Civil Grand Jury found no comprehensive, formalized succession plan or institutional knowledge preservation strategy specific to PA/PG operations.<sup>47</sup>
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**Facts 4:**

- PA/PG receives referrals from multiple external entities, including hospitals, law enforcement agencies, courts, and community organizations, when individuals appear to require estate administration or conservatorship services.<sup>48</sup>
- Eligibility for PA/PG involvement in conservatorship matters is determined by statutory criteria and requires court approval.<sup>49</sup>
- Information reviewed by the Civil Grand Jury indicates that referrals received by the PA/PG vary in completeness and appropriateness based on statutory authority and eligibility requirements.<sup>50</sup>
- When referrals do not meet statutory criteria or lack required information, PA/PG staff must expend additional time to clarify jurisdiction, request supplemental documentation, or redirect the referring entity.<sup>51</sup>
- Public-facing information describing the PA/PG's role, authority, and referral process is limited and dispersed across multiple county or external sources.<sup>52</sup>

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**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.

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**Facts 5:**

- Oversight of the Office of the Public Administrator/Public Guardian (PA/PG) occurs primarily through the Superior Court in probate and conservatorship matters, with court review focused on case-specific compliance with statutory and procedural requirements.<sup>53</sup>
- The Health and Human Services Agency (HHSA) provides administrative oversight of the PA/PG as part of the County's organizational structure.<sup>54</sup>
- Information reviewed by the Civil Grand Jury indicates that existing oversight mechanisms emphasize legal and procedural compliance rather than comprehensive evaluation of program performance.<sup>55</sup>
- Publicly available PA/PG reporting primarily consists of budget documents, organizational information, and required court filings, rather than consolidated performance metrics.<sup>56</sup>
- The Civil Grand Jury found no standardized set of program-level performance measures used to evaluate PA/PG operations across estate administration and conservatorship functions.<sup>57</sup>

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**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 as a collection of individual cases.

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**Facts 6:**

- The Office of the Public Administrator/Public Guardian (PA/PG) uses administrative and case management systems to track estate administration and conservatorship activities.<sup>58</sup>
  - Information reviewed by the Civil Grand Jury indicates that some PA/PG systems are legacy platforms that are not fully integrated with broader County technology infrastructure.<sup>59</sup>
  - Certain administrative and reporting tasks require manual data entry or parallel recordkeeping across multiple systems.<sup>60</sup>
  - Limited system integration affects the ability to generate consolidated, program-level reports on caseloads, processing timelines, and operational metrics.<sup>61</sup>
  - County departments maintain technology standards and infrastructure intended to support data security, accuracy, and reporting consistency across programs.<sup>62</sup>
  - The Civil Grand Jury found no documented, department-specific technology integration plan addressing PA/PG legacy systems within the broader County information technology environment.<sup>63</sup>
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**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 integration plan may limit data accuracy, reporting consistency, and the County's ability to generate consolidated, program-level performance information.

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**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.

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**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 onboarding materials.

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### **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.

This framework should identify critical roles dependent on specialized expertise and establish structured knowledge-transfer protocols to support operational stability.

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### **Recommendation 4:**

#### **Public Information and Referral Guidance**

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.

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#### **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.

These measures 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.

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#### **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.

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**“The measure of public service is how well it protects those with no voice.”**

San Diego County Civil Grand Jury, 2025–2026 Term

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## **Required Responses**

**Pursuant to California Penal Code §§ 933 and 933.05, the following entities are required to respond to this report:**

- **San Diego County Board of Supervisors**
- **San Diego County Health and Human Services Agency**

## **Invited Responses**

- **The Office of Aging and Independent Services**

**Responses must address each finding and recommendation and be submitted within the timeframes specified by statute.**

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<https://www.sdcourt.ca.gov/sdcourt/probate2/probaterules>.

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## **Appendices**

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### **Appendix A**

#### **Scope of Judicial and Administrative Oversight**

Estate administration and conservatorship activities conducted by the PA/PG are subject to ongoing judicial oversight by the San Diego County Superior Court, Probate Division. Court oversight focuses on statutory compliance, case-specific actions, and approval of required filings and reports.

Administrative oversight is provided through the County of San Diego Health and Human Services Agency (HHSA), which is responsible for organizational placement, budgeting, staffing, and policy compliance. This administrative oversight is distinct from, and complementary to, judicial review.

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## **Appendix B**

### **Glossary of Key Terms**

#### **Conservatorship**

A court-ordered legal arrangement in which a conservator is appointed to manage the personal and/or financial affairs of an individual who is unable to do so independently.

#### **Estate Administration**

The legal process of managing and distributing the assets of a deceased person in accordance with probate law.

#### **Lanterman-Petris-Short (LPS) Act**

California law governing involuntary mental health treatment and the establishment of certain court-ordered conservatorships.

#### **Public Administrator**

A county official authorized to administer estates when no private executor or administrator is available.

#### **Public Guardian**

A county official authorized to serve as court-appointed conservator for individuals who meet statutory criteria.

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## **Appendix C**

### **Acronyms List**

**HHSA** Health and Human Services Agency (County of San Diego)

**LPS Act** Lanterman-Petris-Short Act

**PA/PG** Office of the Public Administrator / Public Guardian

## **Appendix D**

### **Limitations of Review**

This review was conducted in accordance with the authority granted to the San Diego County Civil Grand Jury under California Penal Code §§ 925–933.6. The Grand Jury did not evaluate individual case decisions, medical determinations, or judicial outcomes. Findings and recommendations are based on information available during the review period and reflect system-level observations only.

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### **Confidentiality**

This report was prepared by the **San Diego County Civil Grand Jury** pursuant to California Penal Code §§ 925, 925a, 928, and 933. All testimony and documents reviewed by the Grand Jury remain confidential under Penal Code §929. Information contained herein reflects only that which is authorized for public release.

### **Original Language Notice**

This report includes original narrative and analytical language authored by the San Diego County Civil Grand Jury. Such language reflects the Grand Jury’s collective synthesis, observations, and conclusions based on its review of publicly available information, documents, and interviews. Original language is used to frame findings and

recommendations and does not represent verbatim statements or positions of interviewed individuals, departments, or external agencies.

### **Recusal Statement**

One or more members of the San Diego County Civil Grand Jury recused themselves from portions of this investigation and from deliberation or voting on related findings and recommendations, as appropriate. Such recusals were made to avoid potential conflicts of interest and did not affect the Grand Jury's ability to conduct its review or reach its conclusions.

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<sup>1</sup> California Legislative Information, **California Probate Code § 2920** and Welfare and Institutions Code §§ 5350–5372, accessed March 23, 2026, <https://leginfo.legislature.ca.gov/>.

<sup>2</sup> California Legislative Information, *Probate Code §§ 7600–7624 (Public Administrator Authority and Duties)*, accessed March 23, 2026, [https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?division=7.&part=4.&chapter=1.&article=](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=7.&part=4.&chapter=1.&article=)

<sup>3</sup> California Legislative Information, *Welfare and Institutions Code §§ 5350–5372 (Lanterman-Petris-Short Act Conservatorships)*, accessed March 23, 2026,

[https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?division=5.&part=1.&chapter=2.&article=](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=5.&part=1.&chapter=2.&article=)

<sup>4</sup> California Penal Code §§ 925–933.6 (Civil Grand Jury Authority), California Legislative Information, accessed March 23, 2026,

[https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?division=2.&title=4.&part=2.&chapter=2.&article=](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=2.&title=4.&part=2.&chapter=2.&article=)

<sup>5</sup> County of San Diego, *Adopted Budget and Operational Plan, Fiscal Year 2025–26*, Public Administrator/Guardian/Conservator program, accessed March 23, 2026,

<https://sandiegocounty.budget.socrata.com>

<sup>6</sup> San Diego County Civil Grand Jury, interviews with Office of the Public Administrator/Public Guardian personnel and related entities, conducted pursuant to California Penal Code §§ 925–933.6 (confidential under Penal Code § 929).

<sup>7</sup> County of San Diego, Health and Human Services Agency (HHS), organizational materials and administrative structure, accessed March 23, 2026,

<https://www.sandiegocounty.gov/hhsa>

<sup>8</sup> County of San Diego, Chief Administrative Office, *Information Technology Governance and Standards*, accessed March 23, 2026,

<https://www.sandiegocounty.gov/content/sdc/cao/organization.html>

<sup>9</sup> California Legislative Information, *Probate Code §§ 7600–7624 (Public Administrator Authority and Duties)*, accessed March 23, 2026,

[https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?division=7.&part=4.&chapter=1.&article=](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=7.&part=4.&chapter=1.&article=)

<sup>10</sup> California Legislative Information, *Welfare and Institutions Code §§ 5350–5372 (Lanterman-Petris-Short Act Conservatorships)*, accessed March 23, 2026,

[https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?division=5.&part=1.&chapter=2.&article=](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=5.&part=1.&chapter=2.&article=)

<sup>11</sup> California Legislative Information, *Probate Code §§ 7600–7624 (Public Administrator Authority and Duties)*, accessed March 23, 2026,

[https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?division=7.&part=4.&chapter=1.&article=](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=7.&part=4.&chapter=1.&article=)

<sup>12</sup> County of San Diego, Health and Human Services Agency (HHS), *Organizational Structure and Program Overview*, accessed March 23, 2026,

<https://www.sandiegocounty.gov/hhsa>

<sup>13</sup> California Legislative Information, *Probate Code §§ 9600–9650 (Duties of Personal Representative and Estate Administration)*; see also §§ 7600–7624 (Public Administrator Authority), accessed March 23, 2026,

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<sup>14</sup> California Legislative Information, *Welfare and Institutions Code §§ 5350–5372 (Lanterman-Petris-Short Act Conservatorships)*; see also California Probate Code §§ 1850–1851 (General Conservatorship Appointment), accessed March 23, 2026,

[https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?division=5.&part=1.&chapter=2.&article=](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=5.&part=1.&chapter=2.&article=)

and

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see also California Legislative Information, *Probate Code §§ 1850–1851; Welfare and Institutions Code §§ 5350–5372*, <https://leginfo.legislature.ca.gov>
- <sup>17</sup> California Legislative Information, *Penal Code §§ 925–933.6 (Civil Grand Jury Authority)*, accessed March 23, 2026, [https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?division=2.&title=4.&part=2.&chapter=2.&article=](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=2.&title=4.&part=2.&chapter=2.&article=)
- <sup>18</sup> California Legislative Information, *Welfare and Institutions Code §§ 5328 (Confidentiality of Records) and 5350–5372 (Lanterman-Petris-Short Act Conservatorships); Probate Code provisions governing estate and conservatorship records*, accessed March 23, 2026, <https://leginfo.legislature.ca.gov>
- <sup>19</sup> County of San Diego, *Adopted Budget and Operational Plan, Fiscal Year 2025–26*, Public Administrator/Guardian/Conservator program, accessed March 23, 2026, <https://sandiegocounty.budget.socrata.com>
- <sup>20</sup> County of San Diego, Health and Human Services Agency (HHS), organizational materials and administrative structure; San Diego County Superior Court, Probate Division overview, accessed March 23, 2026, <https://www.sandiegocounty.gov/hhsa>  
<https://www.sdcourt.ca.gov>
- <sup>21</sup> California Legislative Information, *Probate Code §§ 7600–7624; Welfare and Institutions Code §§ 5350–5372*, accessed March 23, 2026, <https://leginfo.legislature.ca.gov>
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- <sup>27</sup> California Legislative Information, *Probate Code §§ 7600–7624; Welfare and Institutions Code §§ 5350–5372*, accessed March 23, 2026, <https://leginfo.legislature.ca.gov>

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<sup>28</sup> San Diego County Civil Grand Jury, interviews with Office of the Public Administrator/Public Guardian personnel and external entities, conducted pursuant to California Penal Code §§ 925–933.6 (confidential under Penal Code § 929).

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<sup>32</sup> California Legislative Information, *Probate Code §§ 7600–7624; Probate Code §§ 9600–9650; Welfare and Institutions Code §§ 5350–5372*, accessed March 23, 2026,

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<sup>33</sup> County of San Diego, *Adopted Budget and Operational Plan, Fiscal Year 2025–26*, Public Administrator/Guardian/Conservator program; County of San Diego, Health and Human Services Agency (HHSA) program materials, accessed March 23, 2026,

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<sup>34</sup> County of San Diego, *Adopted Budget and Operational Plan, Fiscal Year 2025–26*, Public Administrator/Guardian/Conservator program; County of San Diego, Health and Human Services Agency (HHSA) program materials, accessed March 23, 2026,

<https://sandiegocounty.budget.socrata.com>

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<sup>35</sup> San Diego County Civil Grand Jury, interviews with Office of the Public Administrator/Public Guardian personnel and review of case processes, conducted pursuant to California Penal Code §§ 925–933.6 (confidential under Penal Code § 929).

<sup>36</sup> California Legislative Information, *Probate Code §§ 7600–7624; Welfare and Institutions Code §§ 5350–5372*; San Diego County Superior Court, Probate Division overview, accessed March 23, 2026,

<https://leginfo.legislature.ca.gov>

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<sup>37</sup> California Legislative Information, *Probate Code §§ 7600–7624; Welfare and Institutions Code §§ 5350–5372*; San Diego County Superior Court, Probate Division overview, accessed March 23, 2026,

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<sup>41</sup> . San Diego County Civil Grand Jury, review of administrative processes, publicly available materials, and interviews with Office of the Public Administrator/Public Guardian personnel, conducted pursuant to California Penal Code §§ 925–933.6 (confidential under Penal Code § 929).

<sup>42</sup> California Legislative Information, *Probate Code §§ 7600–7624; Welfare and Institutions Code §§ 5350–5372*; County of San Diego, Health and Human Services Agency (HHSA) program materials, accessed March 23, 2026,

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<sup>43</sup> California Legislative Information, *Probate Code §§ 7600–7624; Welfare and Institutions Code §§ 5350–5372*; County of San Diego, Health and Human Services Agency (HHSA) program materials, accessed March 23, 2026,

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<sup>44</sup> San Diego County Civil Grand Jury, interviews with Office of the Public Administrator/Public Guardian personnel and review of administrative practices, conducted pursuant to California Penal Code §§ 925–933.6 (confidential under Penal Code § 929).

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<sup>49</sup> California Legislative Information, *Probate Code §§ 7600–7624; Welfare and Institutions Code §§ 5350–5372*, accessed March 23, 2026,

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