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# Board of Supervisors Memorandum

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November 22, 2016

## Appointment of Public Fiduciary

### Background

In October 2011, Mr. Philip Grant was appointed to the position of Public Fiduciary. Mr. Grant retired in July 2016 after 15 years of service to Pima County, and I appointed Mr. Peter Santini the Interim Public Fiduciary.

In my October 27, 2016 memorandum to the Board of Supervisors, I indicated I appointed Mr. Santini to the position of Public Fiduciary based on 1) the recommendation of the Public Defense Services Director, 2) Mr. Santini's demonstrated leadership and effectiveness during his service as Interim Public Fiduciary, and 3) his 23 years of distinguished service in the Fiduciary's Office.

### Recommendation

I recommend the Board of Supervisors ratify my appointment of Mr. Peter Santini to the position of Pima County Public Fiduciary.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "C.H. Huckelberry".

C.H. Huckelberry  
County Administrator

CHH/mjk – November 7, 2016

### Attachment

c: Ellen Wheeler, Assistant County Administrator  
Lori Lefferts, Director, Public Defense Services  
Peter Santini, Public Fiduciary



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# MEMORANDUM

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Date: October 27, 2016

To: The Honorable Chair and Members  
Pima County Board of Supervisors

From: C.H. Huckelberry  
County Administrator 

Re: **Appointment of Public Fiduciary**

As you will recall, Mr. Phil Grant, the former Public Fiduciary, retired in July 2016. At the time, I appointed Mr. Peter Santini to serve as Interim Public Fiduciary and asked that his performance be evaluated to determine if it would be appropriate to permanently appoint Mr. Santini to the position of Public Fiduciary. A recommendation from the Public Defense Services Director regarding this appointment is attached.

Based on Mr. Santini's performance since appointment to Interim Public Fiduciary and his vast previous experience in the Fiduciary's Office, I am appointing Mr. Santini as the Public Fiduciary with Board of Supervisors ratification.

The appointment will be on the November 22, 2016 Board of Supervisors Agenda for ratification.

Mr. Santini's resume is also attached for your review and information.

CHH/anc

Attachment

c: Ellen Wheeler, Assistant County Administrator  
Lori Lefferts, Director, Public Defense Services  
Peter Santini, Interim Public Fiduciary



PUBLIC DEFENSE SERVICES

## MEMORANDUM

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Date: 10/26/2016

To: C.H. Huckelberry  
County Administrator

From: Lori J. Lefferts   
Public Defense Services Director

Re: Recommendation of Peter Santini to Position of Public Fiduciary

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Upon the retirement of Phil Grant from the position of Public Fiduciary on July 8, 2016, Peter Santini was appointed to serve as Interim Public Fiduciary. Mr. Santini was well-suited to take the helm of the Public Fiduciary's Office, having 23 years of service with the department. In the three-plus months since his appointment, Mr. Santini has proven himself an effective leader. He was immediately faced with a staff shortage, but was able to rally the team to ensure that each of their wards was given proper attention, while at the same time recruit and hire five new Guardian/Estate Administrators.

Mr. Santini has the respect of the employees of the department, the Fiduciary community in Arizona, and is recognized nationwide for his expertise. He has served on the National Guardianship Board of Directors and was past President of the Arizona Fiduciaries Association. Mr. Santini gained experience as a manager when he operated a Private Fiduciary in New Mexico for several years. Please see attached resume. Those currently working under him describe him as fair-minded, level-headed, focused, hardworking and compassionate. The office morale is much improved since his appointment. His experience and knowledge is unparalleled and invaluable. It would be difficult to find a more qualified candidate to serve, and for that reason, I recommend Mr. Santini to be the permanent Public Fiduciary.

cc: Ellen Wheeler, Assistant County Administrator

**PETER QUENTIN SANTINI**  
**P.O. BOX 2422**  
**TUCSON, AZ 85702**

**RESUME**

**EDUCATION:**

Lynchburg College, Lynchburg, VA  
1976- 1980 BA Sociology

Virginia Commonwealth University, Richmond, VA  
1980 - 1981 Graduate studies for MSW

Lynchburg College, Lynchburg, VA  
1982- 1985 M.Ed Counseling

**WORK HISTORY:**

Pima County Public Fiduciary, Tucson, AZ  
2015 to present: Deputy Director  
1994 - 2015: Case Investigator Supervisor  
1993 - 1994: Case Investigator

Handmaker Jewish Services for the Elderly, Tucson, AZ  
1992 - 1993: Social Worker; Adult Day Health Center

Desert State Life Management, Albuquerque, NM  
1987 - 1991: Co-founder, Associate Director  
Private Fiduciary, Trust Company

Open Hands, Inc., Santa Fe, NM  
1986 - 1987: Transportation Coordinator  
Adult Day Health Program, Home Health Nursing

Central VA Psychiatric; Pine Ridge Center, Lynchburg, VA  
1986: CEO, Administrator and Business Manager  
Psychiatric Treatment Center, Academy

Lynchburg Nursing Home, Lynchburg, VA  
1982 - 1986: Social Worker, Adm. in Training

**LICENSING:**

- Licensed Professional Fiduciary #20199 Arizona Supreme Court  
1999 - Present

**AFFILIATIONS:**

- Arizona Fiduciaries Association, Tucson, AZ  
1994- Present: Member, Past Treasurer, Past President
- National Guardianship Association: Member  
2000 - 2006: Board of Directors, 2006: Past President
- Arizona State Bar, Mental Health & Elder Law Section, Affiliate  
Member, Past Board Member
- National Guardianship Foundation Registered Guardian
- Arizona Attorney General's "Stop Abuse & Exploitation of the  
Elderly" (SAFE) Multidisciplinary Task Force: Member
- Pima County Death Analysis Review Team (PCDART)
- Center for Guardianship Certification: Registered Guardian
- International Guardianship Network: Member
- Arizona Geriatrics Society: Contributing Journal Author