



OFFICE OF PUBLIC GUARDIANSHIP

**Office of Public Guardianship
Meeting Material
November 10, 2008**

Overview of RCW 2.72

The Office of Public Guardianship

There is created an office of public guardianship within the Administrative Office of the Courts. 2) The Supreme Court shall appoint a public guardianship administrator to establish and administer a public guardianship program in the office of public guardianship. The public guardianship administrator serves at the pleasure of the Supreme Court.

The public guardianship administrator is authorized to establish and administer a public guardianship program as follows:

- The office shall contract with public or private entities or individuals to provide public guardianship services.
- The office shall adopt minimum standards of practice for public guardians providing public guardianship services.
- The office shall track cost savings to the state and report the amount every two years to the legislature and the governor.
- The office shall monitor and oversee the use of state funding to ensure compliance with this chapter.
- The office shall collect uniform and consistent basic data elements regarding service delivery.
- The office shall report to the legislature on how services other than guardianship services, and in particular services that might reduce the need for guardianship services, might be provided under contract with the office by December 1, 2009. The services to be considered should include, but not be limited to, services provided under powers of attorney given by the individuals in need of the services.
- The office shall submit a biennial budget request.
- The office shall require public guardianship providers to seek reimbursement of fees from program clients who are receiving long-term care services through the department of social and health services to the extent, and only to the extent,
- The office shall require public guardianship providers to certify annually that for each individual served they have reviewed the need for continued public guardianship services and the appropriateness of limiting, or further limiting, the authority of the public guardian under the applicable guardianship order, and that where termination or modification of a guardianship order appears warranted, the superior court has been

asked to take the corresponding action.

- The office shall adopt a process for receipt and consideration of and response to complaints against the office and contracted providers of public guardianship services. The process shall include investigation in cases in which investigation appears warranted in the judgment of the administrator. The office shall provide the advisory committee with a summary and analysis of the results of these complaints. When requested by the complaining party, his or her identity shall not be disclosed to the advisory committee.
- The office shall contract with the Washington State Institute for Public Policy for a study.
- The office shall identify training needs for guardians it contracts with, and shall make recommendations, after consultation with the advisory committee to the Supreme Court, the certified professional guardian board, and the legislature for improvements in guardianship training.
- The office shall establish a system for monitoring the performance of public guardians, and office staff shall make in-home visits to a randomly selected sample of public guardianship clients.
- The office shall issue an annual report of its activities, after review of and comment by the advisory committee



October 30, 2008

TO: Office of Public Guardianship (OPG) Ad Hoc Advisory Committee

FROM: Shirley Bondon, Manager, OPG

RE: OPG Status Report

Background

Senate Bill (SB) 5320 (Chapter. 364, Laws of 2007), signed with a partial veto by the Governor on May 8, 2007 and effective July 22, 2007, established the OPG within the Administrative Office of the Courts (AOC). The overall goal and objective of the OPG as prescribed by SB 5320 is to provide quality public guardianship services to incapacitated persons who need them and for whom adequate services may otherwise be unavailable.

The Plan and Planning Process

Following legislative creation of the OPG, the Chief Justice of the Supreme Court appointed the State Court Administrator as administrator of the OPG. With broad stakeholder input, the Administrator developed a position description for the manager of the OPG and initiated an open recruitment process. The selection of a manager involved various stakeholders in developing and scoring a written exercise and a two phase interview process. The manager officially began work September 4, 2007.

A project charter¹, prepared September 2007, formally initiated the OPG project. The plan specified issues to be addressed within 60–90 days, 12 months, and 24 months. This report provides status on those issues.

¹ Project Charter is available upon request.

Issues Addressed within 60–90 days

Geographical Location of Pilots

January 2008 the OPG prepared and advertised a Request for Proposal (RFP)² inviting professional guardians to submit proposals that were to be used to identify pilot locations. Two proposals were received and only one met the minimum qualifications. The limited number of proposals received is believed to be largely a result of certified professional guardians (CPGs) inability to adhere to the 1:20 caseload restriction imposed by SB 5320.

After the unsuccessful RFP process, the OPG selected five pilot locations, Clallam, Grays Harbor, Okanogan, Pierce, and Spokane counties based on the following factors (1) percent of the population age 18 and over living in poverty, (2) percent of the population age 65 and over, (3) disability prevalence of the population, (4) percent of adults within the population receiving Department of Social and Health Services (DSHS) long term care services, and (5) availability of certified professional guardians willing and able to provide services.

Public guardianship contracts were executed June 2008. Cases are in process in Okanogan, Pierce and Spokane counties. The OPG is currently exploring establishing a contract to provide public guardianship services with a certified professional guardian in King County.

Preferred Structure for Public Guardianship Services

Although it is too early to provide a definitive recommendation on the preferred structure of contract providers of public guardianship services, initial observations indicate that an agency structure is preferred over individuals.

Generally, an agency provides the advantage of greater internal support, both administrative and guardian, resulting in increased operational efficiency. One person doing all things generally results in a focused effort in areas of individual strength and minimal effort in areas of individual weakness.

Stakeholder Involvement in the OPG

The manager of the OPG visited with stakeholders³ individually and in group settings to obtain recommendations and suggestions related to the development of the OPG, contracts with public guardians, and the future direction of the OPG. An ad hoc stakeholder committee is being developed to review and comment on a draft strategic plan that will help guide the direction of the OPG over the next ten years.

² RFP is available upon request

³ A list of stakeholders visited is available upon request.

Structure of the Study Performed by the Washington State Institute of Public Policy (WSIPP)

The OPG consulted with Roxanne Lieb, WSIPP Director and Mason Burley, WSIPP Senior Research Associate to develop a statement of work for the study contract. The contract was executed and work is progressing. Mason Burley developed the study evaluation plan⁴, and was instrumental in identifying information used to select the pilot public guardianship sites.

Policy and Procedures Manual⁵

The OPG developed a policy and procedures manual which addresses the collection and reporting of guardianship service data elements and includes standardized forms, the process for addressing complaints against public guardians, and performance monitoring of public guardians.

Eligibility Criteria for Public Guardianship Services

SB 5320 authorized the provision of public guardianship services to incapacitated persons (1) age 18 or older, (2) whose income level does not exceed 200 percent of the federal poverty level as determined annually by the United States Department of Health and Human Services (US DHHS), or (3) are receiving long-term care services through the Washington State DSHS. In addition, because OPG is considered the guardian of last resort, OPG asks that there be no one else willing and able to serve. The OPG also established the following priorities: (1) indigent/homeless, (2) at significant risk of harm from abuse, exploitation, abandonment, neglect or self-neglect, and (3) imminent danger of loss or significant reduction in public services that are necessary to live successfully in the most integrated and least restrictive environment that is appropriate for a specific individual.

Issues Addressed within 12 Months***Obtaining State-Level Guardianship Data***

As currently collected, county-level data cannot be aggregated in a manner that makes it usable for effective guardianship case management or provide guidance for policymakers and practitioners to strengthen the guardianship system and prevent elder abuse. Therefore, the OPG has prepared a grant proposal⁶ for the Borchard Foundation with the overall goal of strengthening court collection of data on adult guardianships. Improved data collection will facilitate (1) effective case processing and monitoring, (2) gauge the extent of abuse by guardians and the extent to which guardians protect incapacitated persons from abuse, and (3) shape guardianship policy, practice, training, and education.

⁴ Study Evaluation Plan is available upon request.

⁵ Policy and Procedures Manual available upon request.

⁶ Grant proposal available upon request.

Guardianship Case Management

Don Horowitz, a member of the Access to Justice Technology Committee, facilitated collaboration between the OPG and the University of Washington (UW) Information Management School. Student interns working with Mike Crandall, Chair of the Master of Science in Information Management Program at the UW Information Management School will gather requirements for the development of a Guardianship Case Management System. Students are required to provide a plan by mid-February and must complete the project by June 2009. Information on the UW internship program can be found at <http://www.ischool.washington.edu/msim/capstone/default.aspx>

Issues to Address within 24 Months**Concerns Unveiled During Project Implementation****Lack of CPGs Available to Provide Public Guardianship Services**

In some rural counties there are either no certified guardians or those guardians in the county have reached peak capacity. In response to this concern the Washington State Bar Association Elder Law Section Executive Committee has voted to support an amendment to the public guardianship law (RCW 2.72.030) to authorize the OPG to provide or pay for training and related expenses not only for individuals serving as professional guardians but also for individuals not yet certified, who in the judgment of the administrator might provide services under RCW 2.72.030. This is an attempt to get people certified as professional guardians in underserved counties.

Free Legal Service for Petitioners

Petitioning is problematic when low income, at-risk, alleged incapacitated persons are involved and there is no abuse, neglect, or exploitation. While there may be many potential petitioners, family members, friends, neighbors, or facilities, research informs us that few individuals actually petition when low income people are involved.

If an individual or entity decides to file a petition, he or she has two options: (1) proceed pro se or, (2) seek the services of a private or pro bono attorney. Research indicates that often individuals and organizations will be unwilling to serve as a petitioner either due to a perceived conflict of interest (e.g., nursing homes), an unwillingness to intercede, an inability to proceed pro se due to lack of confidence or understanding of the legal system, or a lack of resources to pay for the hiring of an attorney. Regardless of the reason, a backlog of cases frequently develops, the needs of at-risk individuals are not met, and preventable emergencies arise.

This issue must be addressed before the public guardian program expands statewide. In the interim, Northwest Justice Offices and pro bono lawyer programs in the pilot counties have agreed to provide legal services to petitioners as resources permit.

Title 11 Guardians-ad-litem

As the eyes and ears of the court, the guardian ad litem (GAL) is charged with identifying: the triggering issue, less restrictive alternatives, risk of harm, whether there is a need for clinical evaluation, whether the individual requires counsel, the family's situation who might provide important testimony, and suggestions for limitations to guardianship and/or elements of a guardian plan, as well as evaluating capacity. Time restrictions imposed on GALs, due to limited resources, in cases involving low and no income individuals hinder the ability to perform a thorough investigation. The lack of thoroughness has the potential result of appointing a public guardian when a lay or professional guardian could serve. These mistakes result in unnecessary use of court and other public resources.

Comprehensive Assessments

*Judicial Determination of Capacity of Older Adults in Guardianship Proceedings*⁷, the work product of an American Bar Association (ABA)/American Psychological Association (APA) workgroup, describes the six pillars of capacity assessment and how they inform each judicial action step in adult guardianship proceedings. These six pillars also drive the development of a comprehensive care plan. Currently, most medical reports obtained by guardians ad litem do not address the six pillars. Guardians who provide services without a thorough assessment operate at a disadvantage, as they must begin to provide services without knowledge of what treatments, services, or habilitation should be provided based on the needs of the incapacitated person. If the public guardian program is to expand statewide the need to obtain thorough assessments should be addressed.

Social Services

Limited availability of social service providers in rural areas creates potential problems for guardians, such as conflicts and increased costs, as they attempt to provide needed services.

⁷ Electronic version of book available upon request.

Strategic Plan 2008-2018

The Strategic Plan is the framework for decisions and actions toward continued development of the Office of Public Guardianship (OPG). It directs the work of the manager, the use of funding, and provides a means to monitor progress.

Mission Statement

To act as a conduit for the provision of qualified surrogate decision-makers for low income individuals.

Vision

Within 10 years, qualified surrogate decision-makers will be available statewide to meet the need of low income individuals with limited capacity, who require assistance making decisions related to individual's health, safety, and financial affairs.

Strategic Goals

GOAL 1: COMMITMENT TO CLIENT NEEDS

The OPG is committed to addressing the unique needs of persons with limited capacity. OPG understands that the services provided should encourage the independence and self reliance of the incapacitated person to the extent possible, while according the protection required by the individual as a result of his or her disabilities.

Objective 1.1: Thorough Assessments

The OPG will seek to obtain assessments that address the six pillars of capacity. The six pillars are: (1) medical condition, (2) cognitive functioning component, (3) everyday functioning, (4) values and preferences, (5) risk of harm and level of supervision needed, and (6) means to enhance capacity. These assessments will guide the development of a comprehensive care plan.

- Strategy 1.1A: Obtain thorough investigator reports.
- Strategy 1.1B: Obtain thorough clinical evaluations (physician and social worker assessments).
- Strategy 1.1C: Update assessments regularly.
- Activity 1.1A. Promote quality education for investigators.

- Activity 1.1B. Communicate the need for assessments to the judiciary.
- Activity 1.1C. Explore development of assessment teams.
- Activity 1.1D. Explore contracting with assessment professionals.
- Activity 1.1E. Train public guardians to perform assessments.
- Activity 1.1F. Periodically obtain independent assessments.
- Activity 1.1G. Develop assessment forms.

Objective 1.2: Quality Communication Between Guardians and Persons Served.

The OPG expects contracted public guardians to ensure communication with persons served is effective. Guardians shall consult with others who are experienced in communicating with the incapacitated person, and shall make use of recommended communication techniques and technology in order to identify the choices and preferences of the incapacitated person.

- Strategy 1.2A. Require completion of a value analysis and respect what is learned.
- Strategy 1.2B. Require regular visits.
- Strategy 1.2C. Stress shared decision-making to the extent possible.

- Activity 1.2A. Provide training.
- Activity 1.2B. Define an optimum caseload using a case weighting system that considers case acuity, placements and case diagnosis.
- Activity 1.2C. Develop forms.
- Activity 1.2D. Provide interpreters.

Objective 1.3: Quality Public Guardianship Services.

Quality public guardianship services can be defined as the degree to which guardianship services increase the likelihood of desired outcomes.

- Strategy 1.3A. Require adherence to high standards.
- Strategy 1.3B. Require thorough plan of care and regular reporting.
- Strategy 1.3C. Monitor public guardianship services.

- Activity 1.3A. Provide training.
- Activity 1.3B. Develop forms.
- Activity 1.3C. Perform performance reviews.
- Activity 1.3D. Get feedback - persons served, guardians, family, friends, and professionals.
- Activity 1.3E. Develop partnerships with potential reviewers.
- Activity 1.3F. Educate community.
- Activity 1.3G. Develop high standards.
- Activity 1.3H. Promote public policies and legislation advancing the ethical practice of guardianship.

Objective 1.4: Available Alternatives to Guardianships.

Every person with a disability or with reduced capacity does not need a guardian. There are many ways to assist individuals, but to be helpful, these alternatives must be accessible. Guardianship should be the last resort and should be used when no other solution will work.

Strategy 1.4A. Develop plans to provide alternatives – power of attorney, representative payee, case management, money management and/or healthcare agents.

Activity 1.4A. Determine needs.

Activity 1.4B. Review research.

Activity 1.4C. Facilitate discussions with SSA and VA.

Activity 1.4D. Promote public policies and legislation.

Activity 1.4E. Identify funding sources.

Objective 1.5: Free Legal Services for Petitioners.

Initiation of every guardianship case requires an individual and/or entity willing to serve as the petitioner. In instances of abuse, neglect or exploitation, the Attorney General (AG) will file a petition for guardianship on behalf of Adult Protective Services (APS), but rarely does so in other circumstances.

Petitioning is problematic when low income, at-risk, alleged incapacitated persons are involved and there is no abuse, neglect or exploitation. While there may be many potential petitioners, family members, friends, neighbors, or facilities, research informs us that few individuals actually petition when low income people are involved.

Strategy 1.5A. Establish a temporary process for pilots.

Strategy 1.5B. Develop a plan to provide free legal services to petitioners statewide.

Activity 1.5A. Facilitate discussions with the AG, civil legal service provides pro bono lawyer programs.

Activity 1.5B. Develop forms.

Activity 1.5C. Promote public policies and legislation.

Activity 1.5D. Educate potential petitioners.

GOAL 2: IMPROVED ORGANIZATIONAL PERFORMANCE

Ensuring program success requires continuous improvement. Success is remaining open to continuous feedback and subsequent program adjustments. Evaluation provides the feedback.

Objective 2.1: Uniform System of Data Collection.

Program evaluation requires carefully collecting information in an organized fashion in order to make necessary decisions.

Objective 2.2 Realistic Performance Measures.

Requires determining what information is needed to make decisions (customer needs, funding, complaints, etc).

Strategy 2.2A. Establish a data collection mechanism (who and how).

Strategy 2.2B. Develop a guardianship case management system.

Activity 2.2A. Facilitate discussions with the AG, civil legal service providers, pro bono

Activity 2.2B. Determine targets.

Activity 2.2C. Analyze and report.

GOAL 3: INFORMED PARTICIPANTS

With our elderly population increasing and persons with disabilities living longer, many individuals will need to address difficult questions about the care of individuals within these populations. Providing guidelines, standards, and reliable information about guardianship and other alternatives will result in better decisions for and about vulnerable adults.

Objective 3.1 Well-informed Guardians, Family, Investigators, Judicial Officers, Community Partners and the Public.

Informing families, guardians, investigators, judicial officers, community partners, practitioners and the general public will help drive the development of education, policy, practice, research, legislation, and funding to improve the quality of life of persons with diminished capacity.

Strategy 3.1A. Document standards.

Strategy 3.1B. Educate and train.

Activity 3.1A Establish and document minimum qualifications.

Activity 3.1B Establish best practices.

Activity 3.1C Establish standards of practice.

Activity 3.1D Provide continuing education.

Activity 3.1E Provide community education.

GOAL 4: ACCOUNTABILITY

To create a culture of accountability by demonstrating the ownership of positive and negative circumstances necessary for achieving desired results. The first step toward creating a culture of accountability is to define clear results and communicate goals to everyone.

Target clear results, holding everyone accountable for achieving the result and not just doing his or her job. Joint accountability demands that everyone become accountable for producing the desired results.

Get people to work beyond the boundaries of their jobs and cause them to ask, “What can I do to improve guardianship for everyone?” The real value and benefit of accountability stems from an ability to influence events and outcomes before they happen. This view of accountability can help heighten innovation, improve the quality of services produced, and increase responsiveness to the needs and wants of customers and stakeholders.

Objective 4.1 Achieve and Report Results.

Statistical information should be summarized and made available to stakeholders regularly.

Objective 4.2 Balance Confidentiality and Public Access.

Strike an appropriate balance between client and practitioner right to privacy, the protection of others, and the public’s right to know.

Strategy 4.2A Set Clearly Defined Results.

Strategy 4.2B Be Proactive, Not Reactive.

Activity 4.2A. Establish performance standards.

Activity 4.2B Develop grievance procedures.

Activity 4.2C Perform investigations and sanction.

Activity 4.2D Share information.

Activity 4.2E Post grievances and resolutions.

Activity 4.2F Require independent performance reviews.

GOAL 5: ADEQUATE FUNDING

The service plan will determine the funding level needed.

Objective 5.1 Develop Several Funding Streams

Multiple funding streams provide stability and reduce uncertainty resulting from budget shortfalls.

Strategy 5.1A Develop fundraising plan.

Activity 5.1A. Perform research.

Activity 5.1B. Submit legislative budget requests.

Activity 5.1C. Apply for grants.

Activity 5.1D. Explore Older Americans Act.

Activity 5.1E. Explore pooled special needs trusts.

Activity 5.1F. Consider filing fees, fines, surcharges.

Activity 5.1G. Explore escheat funds.

Vision: Within 10 years, qualified surrogate decision-makers will be available statewide to meet the need of individuals with limited capacity, who require assistance making decisions related to individual health, safety and financial affairs.

Mission: To act as a conduit for the provision of qualified surrogate decision-makers.

Performance Measures	Goals	Objectives	Strategies	Activities
<p>How do we measure success?</p>	<p>Goals are broad, high-level, issue oriented statements of an organizations desires future direction or the outcomes that they strive to achieve.</p>	<p>Objectives break down goals into smaller, more specific pieces.</p>	<p>Strategies are statements of the methods for achieving goals.</p>	
<p><i>Goals and objectives state what the organization wants to achieve</i></p>		<p><i>Strategies state how goals and objectives will be achieved.</i></p>		<p><i>Specific actions, programs, initiatives or projects.</i></p>
<p>Investigators trained</p> <p>Forms developed</p> <p>Communications to judiciary</p> <p>Assessment teams developed</p> <p>Contracts developed</p> <p>Public guardians trained</p> <p>Assessments completed</p>	<p><i>Focus on the needs of persons with limited capacity</i></p>	<p>Thorough assessments</p>	<p>Obtain thorough investigator reports</p> <p>Obtain thorough clinical evaluations</p> <p>Obtain capacity assessment regularly</p>	<p>Train investigators</p> <p>Communicate need to judiciary</p> <p>Develop forms</p> <p>Explore development of assessment teams</p> <p>Explore contracts development with other professionals</p> <p>Train public guardians</p> <p>Develop forms</p> <p>Obtain independent assessment</p>

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<p>Public guardians trained</p> <p>Forms developed</p> <p>Value Analysis Completed</p>	<p><i>Focus on the needs of persons with limited capacity</i></p>	<p>Good IP-Guardian Communication</p>	<p>Require completion of thorough value analysis</p> <p>Require regular visitation</p>	<p>Train public guardians</p> <p>Develop forms</p> <p>Review value analysis</p> <p>Train public guardians</p> <p>Restrict caseloads</p>
<p>Caseload policy developed</p> <p>Caseload adherence</p>			<p>Require shared decision-making</p>	<p>Evaluate caseload restrictions</p> <p>Train public guardians</p>

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<p>Public guardians trained</p> <p>Forms developed</p> <p>Experts consulted</p> <p>Reviews, audits completed</p> <p>Presentations at events</p> <p>Partnerships developed</p> <p>Reports received</p>	<p><i>Focus on the needs of persons with limited capacity</i></p>	<p>Quality services</p>	<p>Require thorough plan of care</p> <p>Monitor services</p>	<p>Train public guardians</p> <p>Involve experts</p> <p>Develop forms</p> <p>Perform performance reviews, audits</p> <p>Educate community about guardianships</p> <p>Develop partnerships with potential reviewers</p> <p>Require regular reporting</p>

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<p>Research reviewed</p> <p>Contacts made</p>	<p><i>Focus on the needs of persons with limited capacity</i></p>	<p>Alternatives to guardianship</p>	<p>Develop a plan to provide representative payees</p> <p>Develop a plan to provide POA</p> <p>Develop a plan to provide case management</p>	<p>Review research</p> <p>Contact SSA, VA</p> <p>Draft plans</p>
<p>Legislation identified</p> <p>Funding sources identified</p> <p>Plans drafted</p>			<p>Develop a plan to provide money management</p> <p>Develop a plan to obtain healthcare decisions</p>	<p>Identify potential legislation</p> <p>Identify funding sources</p>

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<p>Contacts made</p> <p>Agreements reached</p> <p>Forms developed</p> <p>Committee established</p>	<p><i>Focus on the needs of persons with limited capacity</i></p>	<p>Legal services for petitioners</p>	<p>Establish temporary process for pilots</p>	<p>Contact each NW Justice Office</p> <p>Contact pro bono lawyers</p> <p>AAG petitions for APS & DDD</p> <p>Intake through CLEAR</p> <p>Develop forms</p>
<p>Plan drafted</p> <p>Legislation identified</p> <p>Funding requested</p>			<p>Develop a plan to provide legal services to petitioners</p>	<p>Convene advisory committee</p> <p>Draft plan</p> <p>Identify potential legislation</p> <p>Request funding</p>

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<p>Interns obtained</p> <p>IT metrics met, scope, schedule.</p>	<p><i>Improve organizational performance</i></p>	<p><i>Uniform system of data collection</i></p>	<p>Develop a guardianship case management system</p>	<p>Secure UW IT student interns</p> <p>Gather requirements</p> <p>Design application</p> <p>Test application</p> <p>Deplore application</p>
<p>County baselines</p> <p>Forms developed</p> <p>Guardians engaged</p>			<p>Establish data collection mechanisms</p>	<p>Establish baseline-UW</p> <p>Partner with courts</p> <p>Develop forms</p> <p>Engage professional and lay guardians</p>

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<p>Qualifications established</p> <p>SOP, Best Practices established</p> <p>Public guardians trained</p>	<p><i>Informed Participants</i></p>	<p><i>Well- informed Guardians, Investigators, Judicial Officers, Community Partners, and Public</i></p>	<p>Document standards</p>	<p>Establish minimum qualifications</p> <p>Establish standards of practice</p> <p>Establish best practices</p> <p>Train public guardians</p> <p>Provide continuing education</p>
<p>Education developed</p> <p>Education presented</p> <p>Applicants recruited</p>			<p>Educate and Train</p>	<p>Develop education campaign</p> <p>Conference education</p> <p>Community education</p> <p>Recruit public guardians from diverse populations</p>

Vision: Within 10 years, qualified surrogate decision-makers will be available statewide to meet the need of individuals with limited capacity, who require assistance making decisions related to individual health, safety and financial affairs.

Mission: To act as a conduit for the provision of qualified surrogate decision-makers

Performance Measures	Goals	Objectives	Strategies	Activities
<p>How do we measure success?</p>	<p>Goals are broad, high-level, issue oriented statements of an organizations desires future direction or the outcomes that they strive to achieve.</p>	<p>Objectives break down goals into smaller, more specific pieces.</p>	<p>Strategies are statements of the methods for achieving goals.</p>	
<p><i>Goals and objectives state what the organization wants to achieve</i></p>		<p><i>Strategies state how goals and objectives will be achieved.</i></p>		<p><i>Specific actions, programs, initiatives or projects.</i></p>
<p>Performance standards dev</p> <p>Grievance process developed</p> <p>Investigation process dev.</p> <p>Investigations completed</p>	<p><i>Accountability</i></p>	<p><i>Balance confidentiality and public access</i></p>	<p>Investigation & Sanctions</p>	<p>Provide due process</p> <p>Establish performance standards</p> <p>Develop open grievance process</p> <p>Work independently of the courts</p> <p>Develop investigation process</p>
<p>Grievances and resolutions posted</p>			<p>Provide transparency</p>	<p>Share info. with the CPGB & the courts</p> <p>Post grievances and resolutions</p>

Vision: Within 10 years, qualified surrogate decision-makers will be available statewide to meet the need of individuals with limited capacity, who require assistance making decisions related to individual health, safety and financial affairs.

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<p>How do we measure success?</p>	<p>Goals are broad, high-level, issue oriented statements of an organizations desires future direction or the outcomes that they strive to achieve.</p>	<p>Objectives break down goals into smaller, more specific pieces.</p>	<p>Strategies are statements of the methods for achieving goals.</p>	
<p><i>Goals and objectives state what the organization wants to achieve</i></p>		<p><i>Strategies state how goals and objectives will be achieved.</i></p>		<p><i>Specific actions, programs, initiatives or projects.</i></p>
<p>Interns obtained</p> <p>Research completed</p> <p>Plan drafted</p> <p>Legislation identified</p> <p>Funding obtained</p>	<p><i>Adequate Funding</i></p>	<p>Develop several funding streams</p>	<p>Develop fundraising plan</p>	<p>Obtain student interns</p> <p>Perform research</p> <p>Draft legislative budget requests</p> <p>Apply for grants</p> <p>Explore Older American Act</p> <p>Filing fees, fines, surcharges,</p> <p>Identify potential legislation</p> <p>Pooled Special Needs Trust</p> <p>Draft plan</p>

List of Attendees
11/20/2008

Name	Agency
Bondon, Shirley	Office of Public Guardianship
Burley, Mason	Wa. State Institute for Public Policy
Davis, Lonnie	Impediments to Access Committee
Fireman, Jerry	Olympic Area Agency on Aging
Foster, Vicky	Disability Rights Washington
Grovdahl, Steven	Commissioner/Spokane Co. Superior Court
Hoover, Catherine	Office of the Attorney General
LaBarre, Abbey	Office of Public Guardianship
Maltman, David	WA. State Developmental Disabilities Council
McDonough, Sue	Aging & Disability Services Admin/DSHS
Moran, Linda	Office of the Attorney General
Rood, Kim	Administrative Office of the Court
Von Wahldt, Joy Ann	Northwest Justice Project/CLEAR
Wilson, Dee	UW School of Social Work