

Meeting Materials

September 14, 2020 Meeting Minutes

Certified Professional Guardianship Board

Monday, September 14, 2020

Zoom Video Conference

7:00 a.m. – 9:00 a.m.

DRAFT Meeting Minutes

Members Present:

Judge Rachelle Anderson
Ms. Rosslyn Bethmann¹
Judge Grant Blinn
Ms. Rita Forster
Ms. Amanda Froh
Commissioner Diana Kiesel
Judge Robert Lewis
Ms. Lisa Malpass
Dr. K. Penney Sanders
Mr. Dan Smerken
Ms. Susie Starrfield

Guests: See list on last page

Members Absent:

Ms. Amanda Witthauer
Dr. Rachel Wrenn

Staff Present:

Ms. Stacey Johnson
Ms. Kathy Bowman
Mr. Christopher Fournier
Ms. Jennifer Holderman
Ms. Thai Kien
Ms. Kay King
Mr. Ramsey Radwan
Ms. Kim Rood
Ms. Eileen Schock
Ms. Rhonda Scott

1. Special Executive Session 7:00 a.m. – 7:33 a.m. (Closed to Public)

2. Meeting Called to Order (Open to Public)

Judge Rachelle Anderson called the September 14, 2020 Certified Professional Guardianship Board meeting to order at 8:01 a.m.

3. Welcome, Roll-Call And Approval of Minutes

Roll was called and all present were welcomed. Judge Anderson introduced AOC's new Guardian Grievance Investigator, Rhonda Scott.

Motion A motion was made and seconded to approve the minutes of the August 10, 2020 Board meeting as written. The motion passed. Judge Blinn abstained.

4. Chair's Report

Judge Anderson reported that she and Kay King will be making webinar presentations on the Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act (UGA) to Certified Professional Guardians at the Guardian Institute on September 28 and 29. Judge Anderson will present "A Guardianship Update for 2021 and Beyond", and Kay King will speak on "Transitions and Changes under the UGA". Judge Anderson also reported on the work of the Superior Court Guardianship and Probate Committee, jointly with the Family and Juvenile Law Section, focusing on Article 2 of the UGA and minor guardianships. This section of the UGA becomes effective January 1, 2021. Judge Lewis asked if there will be materials provided

¹ Ms. Bethmann left the meeting at 7:33 a.m.

regarding this transition to the courts in general. Staff answered there are two sessions currently scheduled, October 19 and November 2.

5. Grievance Report

Staff reported during the month of August, four new grievances were received, and five grievances were closed. Three grievances remain pending before the Conflict Review Committee. One grievance is in Hearing status. Of the fifty-two (52) total grievances received to date in 2020, twenty-nine (29) have been resolved. Forty-nine (49) grievances remain open requiring investigation. Thirty-one (31), or 63% of open grievances involve nine CPGs or CPG Agencies. A member of the Board commented that a chart included in the Board's meeting materials detailing guardian grievances disaggregated by year of CPG certification no longer seemed meaningful, due to the low number of CPGs involved. Another member of the Board asked Staff how many Professional Guardians who completed an intensive weekend program for certification prior to the UW certification program are still active. Staff will research and report back to the Board.

Before breaking into Executive Session, Judge Anderson opened the floor for any questions or comments from attending members of the public. Hearing none, Judge Anderson called the Open Session closed to the public at 8:16 a.m. and anticipated reconvening at 8:25 a.m. Members of the public were invited stand by in the Zoom Video Conference Waiting Room.

6. Executive Session (Closed to Public)

7. Reconvene and Vote on Executive Session Discussion (Open to Public)

The Public Session reconvened at 8:48 a.m. There were no matters brought up for vote during the Executive Session discussion.

8. Wrap Up/Adjourn

With no other business for action today, Judge Anderson adjourned the September 14, 2020 Certified Professional Guardianship Board meeting at 8:49 a.m. The next Board meeting will take place via Zoom Video Conference on October 12, 2020 at 8:00 a.m.

Summary of Motions

MOTION	STATUS
A motion was made and seconded to approve the minutes of the August 10, 2020 Board meeting as written.	Passed

Guests:

Cindy Dodge
Samantha Hellwig
Scott Malavotte
Chris Neil
Glenda Voller

Chair's Report

Certified Professional Guardianship Board 2021 Meeting Calendar

Monday, January 11, 2021	To be determined	9:00 am – 2:00 pm
<i>February, 2021</i>	<i>No Meeting</i>	
Monday, March 8, 2021	Zoom Meeting	8:00 am – 9:00 am
Monday, April 12, 2021 <i>Annual Planning Meeting</i>	To be determined	9:00 am – 2:00 pm
Monday, May 10, 2021	Zoom Meeting	8:00 am – 9:00 am
Monday, June 14, 2021	To be determined	9:00 am – 2:00 pm
<i>July, 2021</i>	<i>No Meeting</i>	
Monday, August 9, 2021	Zoom Meeting	8:00 am – 9:00 am
Monday, September 13, 2021	Zoom Meeting	8:00 am – 9:00 am
Monday, October 11, 2021	To be determined	9:00 am – 2:00 pm
Monday, November 8, 2021	Zoom Meeting	8:00 am – 9:00 am
<i>December, 2021</i>	<i>No Meeting</i>	

CPG Board in-person meetings are open to the public.

For information regarding teleconference meetings, please contact Kathy Bowman at 360.704.5543 or email Kathy.Bowman@courts.wa.gov

Grievance Status Update September, 2020

Certified Professional Guardians Grievance Status

Month-End

September 30, 2020

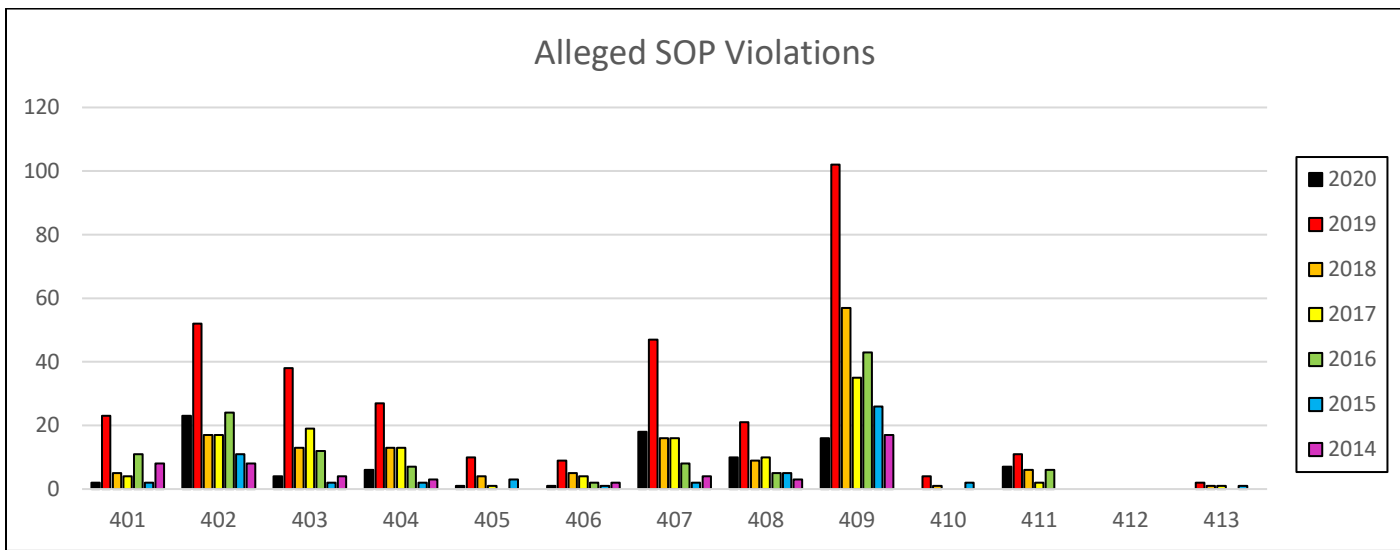
Grievance Status – August 31, 2020	2020	2019	2018	2017	2016	2015	2014	Total
New Grievances Received:	7	0	0	0	0	0	0	7
Grievances Resolved this Month:	[2]	[1]						[3]
Grievances Requiring Investigation*:	28	18	4	2	0	0	0	52

Grievances Pending*	2020	2019	2018	2017	2016	2015	2014	Total
Voluntary Surrender:								
Conflicts Review Committee:		2						2
ARD:								
Complaint/Hearing:					1			1
Administrative Decertification:								
Total Pending:		2			1			3

[*Grievances in Pending status are not counted as Grievances Requiring Investigation.]

Resolution of Grievances – September 30, 2020	2020	2019	2018	2017	2016	2015	2014	Total
Dismissal – No Jurisdiction	1							1
Dismissal – No Actionable Conduct	1	1						2
Dismissal – Insufficient Grievance								
Mediated – Dismissed								
Advisory Letter 507.1								
ARD - Admonishment								
ARD - Reprimand								
ARD - Suspension								
Terminated – Voluntary Surrender								
Terminated – Administrative Decertification								
Terminated – Decertification								
Total Resolved Grievances: September 30, 2020	2	1						3

Grievance Resolutions	2020	2019	2018	2017	2016	2015	2014	Total
Total Grievances Received	59	77	85	104	104	65	64	558
Dismissal – No Jurisdiction	16	15	22	30	20	13	17	133
Dismissal – No Actionable Conduct	14	32	50	59	55	29	22	260
Dismissal – Insufficient Grievance	1	5	3	1	2		2	14
Mediated – Dismissed						1		1
Advisory Letter 507.1		1	3	2	4			10
ARD - Admonishment						1		1
ARD – Reprimand				1	4	4		9
ARD - Suspension								
Termination – CPG Death						2		2
Termination – Administrative Decertification		3	1	1	4	13	11	35
Termination – Voluntary Surrender			2	8	15	2	12	39
Termination – Decertification								
Grievances Resolved To Date: 09.30.2020	31	57	81	102	103	65	64	503



400 Standards of Practice Regulations

- 401 Guardian’s Duty to Court
- 402 Guardian’s Relationship to Family and Friends of Incapacitated Person and to Other Professionals
- 403 Self-Determination of Incapacitated Person
- 404 Contact with the Incapacitated Person
- 405 General Decision Standards
- 406 Conflicts of Interest
- 407 Residential Decisions
- 408 Medical Decisions
- 409 Financial Management
- 410 Guardian Fees and Expenses
- 411 Changes of Circumstances/Limitation/Termination
- 412 Sale or Purchase of Guardianship Practice
- 413 Responsibilities of Certified Public Guardian Agencies

ID	Year Cert.	Open	Year(s) Grievances Received	Status
A	2009	2	2020 (2)	
B	2010	3	2019 (1), 2020 (2)	
C	2016	2	2020 (2)	
D	2001	2	2020 (2)	
E	2001	2	2020 (2)	
F	2001	7	2017 (1), 2018 (1), 2019 (5)	
G	2014	4	2017 (1), 2019 (1), 2020 (2)	
H	2018	2	2019 (1), 2020 (1)	
I	2014	2	2020 (2)	
J	2007	3	2019 (2), 2020 (1)	
K	2010	2	2020 (2)	
L	2001	6	2018 (1), 2019 (1), 2020 (4)	
M	2001	2	2019 (1), 2020 (1)	
	TOTAL	39		

Of 52 currently open grievances requiring investigation, 39 concern 13 Agencies/CPGs with 2 or more open grievances.

	Year Guardian Certified	# of Guardians
Before UW Certificate Program	2001	5
	2002	
	2003	
	2004	
	2005	
	2006	
	2007	1
	2008	
	Total	6
UW Certificate Program	2009	1
	2010	2
	2011	
	2012	
	2013	
	2014	2
	2015	
	2016	1
	2017	
	2018	1
	Total	7

Public Comments

From: [Mindi Blanchard](#)
To: [AOC DL - Guardianship Program](#)
Subject: Proposed Rule Changes to Regulation 202
Date: Tuesday, August 11, 2020 8:50:11 AM

I am questioning the need for this rule change. All continuing education, whether with the Guardian Institute, WAPG or the NGA has been viral. The Guardian Institute is offering a hybrid in-person (if allowed by the county)/virtual conference in September. I'd be interested in the complaints that the CPGB has received. Are CPGs saying that their business has suffered? I can't speak for anyone else but Bridge Builders, Ltd only had a slight slowdown in March and April. Business has been picking up rapidly since then. GPGs are essential, so other than not being able to physically visit clients, not much has changed other than spending more phone time with facility staff checking up on clients as best we can. As to the cost of CE, the Guardian Institute offers partial scholarships to those who might be struggling. For our September conference, we have received only one application for a scholarship out of five available. Maybe there are concerned that I have not experienced but unless I know what they are, it's difficult to have any other opinion.

Mindi R. Blanchard, M.Ed., CPG
President
Bridge Builders, Ltd/ The Guardian Institute
PO Box 610
Sequim, WA 98382
(360) 683-8334

From: [Patty Croteau](#)
To: [AOC DL - Guardianship Program](#)
Subject: Emergency revision of 202
Date: Tuesday, August 18, 2020 5:14:00 PM

Dear CPG Board,

Thank you for considering revising 202. I support this revision. It will be very helpful.

Respectfully,

Patricia Croteau, CPG # 9628
Bridge Ministries
12356 Northup Way
Bellevue, WA 98005
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