

Meeting Minutes

October 9, 2023



# Certified Professional Guardianship and Conservatorship Board

Monday, October 9, 2023

Zoom Meeting

9:00 a.m. – 11:30 a.m.

## MEETING MINUTES

### Members Present

Judge Robert Lewis, Chair  
Judge Grant Blinn  
Judge Cadine Ferguson-Brown<sup>1</sup>  
Ms. Lynda Clark  
Ms. Kristina Hammond  
Ms. Melanie Maxwell  
Mr. William Reeves  
Dr. K. Penney Sanders  
Mr. Dan Smerken  
Ms. Susie Starrfield  
Ms. Anita Souza

### Staff Present

Ms. Stacey Johnson  
Ms. Kathy Bowman  
Ms. Thai Kien  
Ms. Kay King  
Mr. Samar Malik  
Ms. Maureen Roberts  
Ms. Rhonda Scott  
Ms. Sherri White

**Guests** – See last page

### 1. Meeting Called to Order

Judge Robert Lewis called the October 9, 2023 Certified Professional Guardianship and Conservatorship Board meeting to order at 9:00 a.m.

### 2. Welcome, Roll Call & Approval of Minutes

Judge Lewis welcomed all present. Judge Lewis invited each Board member to introduce themselves.

Motion: It was moved and seconded to approve the September 11, 2023 minutes. The motion passed.

### 3. Chair's Report

Judge Lewis welcomed everyone and reviewed committee assignments. There are no Board meeting schedule changes expected at this time. Judge Lewis reminded Board members to complete the annual confidentiality agreement.

### 4. Public Comment Period

Members of the public addressed the Board regarding regulations and continuing education.

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<sup>1</sup> Judge Ferguson-Brown joined at 9:17 a.m.

## **5. Grievance Report**

Ms. Scott reported eight (8) new grievances were received during the month of September. The Board dismissed seven (7) grievances and forwarded eight (8) grievances to Superior Court. A total of thirty-one (31) grievances were unresolved at the time of the report. Currently, there are two hundred forty-six (246) active CPGCs.

## **6. University of Washington- Certificate In Guardianship Program**

Program Manager, Ms. Miriam Doyle, along with Instructors, Jamie Shirley and Malinda Frey-Gemlich presented an overview of the redesigned UW program.

## **7. Executive Session (Closed to Public)**

## **8. Reconvene (Open to Public)**

## **9. Vote on Executive Session Discussion**

On behalf of the Applications Committee, Ms. Susie Starrfield presented the following applications for certification.

Motion: It was moved and seconded to conditionally approve Lisa Bill's application for certification based on completion of the UW program, with transferable skills in healthcare and social services. The motion passed.

Motion: It was moved and seconded to conditionally approve Bobbie Hill's application for certification based on completion of the UW program, with transferable skills in social services. The motion passed.

Motion: It was moved and seconded to approve Justine Prather's application for certification with transferrable skills in healthcare, social services, and financial. The motion passed.

Motion: It was moved and seconded to approve Quinn Wells' application for certification with transferrable skills in social services and finances. Dr. Sanders abstained. The motion passed.

Motion: It was moved and seconded to deny Royce Zick's application for certification due to lack of experience. The motion passed.

On behalf of the Standards of Practice Committee, Judge Blinn presented the following grievances for Board action.

Motion: It was moved and seconded to dismiss grievance 2023-049 as incomplete. Judge Ferguson-Brown opposed. Mr. Smerken abstained. The motion passed.

Motion: It was moved and seconded to dismiss grievance 2023-050 as incomplete. The motion passed.

Motion: It was moved and seconded to dismiss grievance 2023-051 as incomplete. The motion passed.

Motion: It was moved and seconded to forward grievance 2023-052 to Superior Court. The motion passed.

- Motion: It was moved and seconded to forward grievance 2023-053 to Superior Court. The motion passed.
- Motion: It was moved and seconded to dismiss grievance 2023-054 as incomplete. The motion passed.
- Motion: It was moved and seconded to dismiss grievance 2022-012 following court review. The motion passed.
- Motion: It was moved and seconded to dismiss grievance 2023-010 following court review. The motion passed.
- Motion: It was moved and seconded to dismiss grievance 2023-015 following court review. The motion passed.
- Motion: It was moved and seconded to dismiss grievance 2023-037 based on correspondence received from Superior Court. The motion passed.

## 10. Wrap Up/Adjourn

With no other business to discuss, Judge Lewis adjourned the October 9, 2023 CPGC Board meeting at 11:16 a.m. The next Board meeting will take place via Zoom on November 13, 2023 beginning at 7:30 a.m.

### Recap of Motions:

MOTION SUMMARY		STATUS
Motion:	It was moved and seconded to approve the September 11, 2023 minutes.	Passed
Motion:	It was moved and seconded to conditionally approve Lisa Bill's application for certification.	Passed
Motion:	It was moved and seconded to conditionally approve Bobbie Hill's application for certification.	Passed
Motion:	It was moved and seconded to approve Justine Prather's application for certification.	Passed
Motion:	It was moved and seconded to approve Quinn Wells' application for certification.	Passed
Motion:	It was moved and seconded to deny Royce Zick's application for certification due to lack of experience.	Passed
Motion:	It was moved and seconded to dismiss grievance 2023-049 as incomplete. The motion passed.	Passed
Motion:	It was moved and seconded to dismiss grievance 2023-050 as incomplete. The motion passed.	Passed
Motion:	It was moved and seconded to dismiss grievance 2023-051 as incomplete. The motion passed.	Passed
Motion:	It was moved and seconded to forward grievance 2023-052 to Superior Court. The motion passed.	Passed
Motion:	It was moved and seconded to forward grievance 2023-053 to Superior Court. The motion passed.	Passed
Motion:	It was moved and seconded to dismiss grievance 2023-054 as incomplete. The motion passed.	Passed
Motion:	It was moved and seconded to dismiss grievance 2022-012 following court review. The motion passed.	Passed

Motion:	It was moved and seconded to dismiss grievance 2023-010 following court review. The motion passed.	Passed
Motion:	It was moved and seconded to dismiss grievance 2023-015 following court review. The motion passed.	Passed
Motion:	It was moved and seconded to dismiss grievance 2023-037 based on correspondence received from Superior Court. The motion passed.	Passed

**Guests:**

Samantha Hellwig, AAG  
 Miriam Doyle, UW  
 Jamie Shirley, UW  
 Malinda Frey-Gemlich, UW  
 Deborah Jameson  
 Crystal Joseph

Jennifer Mick  
 Brenda Morales  
 Karen Newland, Puget Sound Guardians  
 Chris Neil, Neil & Neil, P.S.  
 Senior Support Services  
 Glenda Voller

DRAFT

Grievance Report  
October, 2023

**Certified Professional Guardian and Conservator  
Grievance Status  
October 2023**

<b>New Grievances Received in October 2023:</b>	<b>6</b>
<b>2023 Grievances Dismissed by Board on October 9, 2023:</b>	<b>8</b>
<b>2023 Grievances Forwarded to Superior Court on October 9, 2023:</b>	<b>2</b>

<b>Grievances (UGA)</b>	<b>2022</b>	<b>2023</b>
<b>Total Grievances Received:</b>	<b>75</b>	<b>57</b>
<b>Total Grievances Dismissed: No Jurisdiction, Insufficient Grievance</b>	<b>30</b>	<b>18</b>
<b>Total Grievances Forwarded to Superior Court:</b>	<b>39</b>	<b>34</b>
<b>Total Grievances Dismissed Following Court Order:</b>	<b>37</b>	<b>14</b>
<b>Total Grievances Dismissed Following Investigation:</b>	<b>4</b>	<b>1</b>
<b>Total Grievances Open Pending CRC Review:</b>	<b>1</b>	<b>0</b>
<b>Total Grievances Open Pending Investigation:</b>	<b>1</b>	<b>0</b>

Please note that the numbers reported in this section will not necessarily be equal to the total number of grievances received; this is due to the timing of when new grievances are received and in process of review by the Board.

**Active CPGCs: 250**

### Grievances Pre-UGA

Pre-UGA Grievance Status	2021
Grievances Resolved this Month:	<b>0</b>
Total Grievances Requiring Investigation:	<b>2</b>

Resolution of Pre-UGA Grievances	2021
Total Grievances Received by Year	95
Dismissal No Jurisdiction	9
Dismissal No Actionable Conduct	69
Dismissal Insufficient Grievance	7
Dismissal Administrative	1
Advisory Letter	3
Termination – Administrative Decertification	4
Total 2021 Grievances Resolved:	93

### Guardians/Conservators or Agencies with Multiple Grievances October 2023

Year Certified	2023	2022	2021	Total OPEN
2012	2	0	0	2
2016	7	2	0	9
2014	1	0	1	2
2007	3	0	0	3
2011	2	0	0	2
				<b>18</b>

Of the 30 currently unresolved grievances, 18 involve 5 Certified Professional Guardians/Conservators or Agencies with 2 or more grievances.