

Meeting Materials

January 11, 2021

Meeting Minutes
November 9, 2020



Certified Professional Guardianship Board
Monday, November 9, 2020
Zoom Video Conference
8:00 a.m. – 9:00 a.m.

DRAFT Meeting Minutes

Members Present:

Judge Rachelle Anderson
Ms. Rosslyn Bethmann
Judge Grant E. Blinn
Ms. Rita Forster
Ms. Amanda Froh
Commissioner Diana Kiesel
Judge Robert A. Lewis
Ms. Lisa Malpass
Dr. K. Penney Sanders
Mr. Dan Smerken
Ms. Susan Starrfield
Dr. Rachel Wrenn
Ms. Amanda Witthauer

Staff Present:

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

Guests: See list on last page

1. Meeting Called to Order

Judge Anderson called the November 9, 2020 Certified Professional Guardianship Board (Board) meeting to order at 8:01 a.m.

2. Welcome, Roll-Call And Approval of Minutes

Roll was taken and members of the Board and the public were welcomed. Judge Anderson reminded members of the public there would be no public comment period today. There will be an opportunity for public comment during the next Board meeting to be held on January 11, 2021.

Motion: A motion was made and seconded to approve the October 12, 2020 meeting minutes as written. There were none opposed. The motion passed.

3. Chair's Report

Judge Anderson mentioned her participation, and that of Ms. Kay King and Ms. Jennifer Holderman, at the recent Guardian Institute, Spokane 2020, saying the presentations went well. Judge Anderson reported she is preparing for the upcoming Legislative session as a member of the Superior Court Judges Association – Guardianship and Probate Committee, and will focus on things that will affect the CPG Board, for example, vulnerable adult protection orders. Judge Anderson asked Board members to select and appoint a Vice-Chair to the Board, in accordance with Certified Professional Guardianship Board Bylaws, Article V, Section 1.

4. Grievance Status Report for October, 2020

Staff reported there were ten (10) new grievances received and ten (10) grievances resolved in October, 2020. Two (2) grievances were dismissed for No Jurisdiction, six (6) were dismissed for No Actionable Conduct, and two (2) grievances were resolved with an Advisory Letter. A total of sixty nine (69) grievances have been received to date this year, and thirty nine (39) of these have been resolved. Forty-six (46) grievances remain open for investigation. Ms. Bethmann said she appreciated Mr. Fournier noting in his report how grievances have been resolved each month.

5. Executive Session (Closed to Public)

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

On behalf of the Applications Committee, Judge Lewis presented the following applications for certification. The Applications Committee abstained.

Motion: A motion was made and seconded to conditionally approve Lowest Jefferson's application for certification, upon completion of alternate mandatory training, with transferrable skills in Social Services. Opposed: Ms. Bethmann, Dr. K. Penney Sanders. The motion passed.

Motion: A motion was made and seconded to conditionally approve Erik Still's application for certification, upon completion of alternate mandatory training, with transferrable skills in Social Services. Opposed: Ms. Bethmann. The motion passed.

Motion: A motion was made and seconded to conditionally approve Amanda Wagar's application for certification, upon review of WSP/FBI background reports, with transferrable skills in Social Services and Financial. The motion passed.

Motion: A motion was made and seconded to deny Ilie Burcheci's request for refund of late payment fee. The motion passed.

Motion: A motion was made and seconded to deny Jody Wallace's request to re-certify after the October 1 deadline, and for waiver of late fee. The motion passed.

Motion: On behalf of the Certified Professional Guardianship Board, Ms. Starrfield made a motion to appoint Judge Grant Blinn as Vice-Chair of the Board. The motion was seconded and there were none opposed. Judge Blinn abstained. The motion passed.

7. Wrap Up/Adjourn

With no other business to discuss, the meeting was adjourned at 8:53 a.m. The next Certified Professional Guardianship Board meeting will be held on January 11, 2021 at 9:00 a.m.

Summary of Motions

MOTION	STATUS
A motion was made and seconded to approve the minutes of the October 12, 2020 Board meeting as written.	Passed

A motion was made and seconded to conditionally approve Lowest Jefferson's application for certification, upon completion of alternate mandatory training, with transferrable skills in Social Services. Opposed: Ms. Bethmann, Dr. Sanders. The motion passed.	Passed
A motion was made and seconded to conditionally approve Erik Still's application for certification, upon completion of alternate mandatory training, with transferrable skills in Social Services. Opposed: Ms. Bethmann. The motion passed.	Passed
A motion was made and seconded to conditionally approve Amanda Wagar's application for certification, upon review of WSP/FBI background reports, with transferrable skills in Social Services and Financial. The motion passed.	Passed
A motion was made and seconded to deny Guardian's request for refund of late payment fee. The motion passed.	Passed
A motion was made and seconded to deny Guardian's request to re-certify after the October 1 deadline, and for waiver of late fee. The motion passed.	Passed
A motion was made and seconded to appoint Judge Grant Blinn as Vice-Chair of the Certified Professional Guardianship Board. Judge Blinn abstained. The motion passed.	Passed
Prior to the November 09, 2020 Board Meeting, a vote was taken via email to approve Regulation Committee suggested amendments to GR 23. Voting to approve: Mr. Smerken, Ms. Witthauer, Commissioner Kiesel, Dr. Sanders, Dr. Wrenn, Ms. Malpass, Judge Blinn. Voting to approve Regulation Committee suggested amendments to GR 23 with additional revisions: Ms. Bethmann, Ms. Forster, Judge Lewis, Ms. Froh, Ms. Starrfield. The Regulation Committee suggested amendments to GR 23 were approved.	Passed

Guests:

Scott Malavotte
Ben Miller
Denise Meador
Glenda Voller
Puget Sound Guardians
Brenda Morales
Caroline Wood¹
Shelley U²
Christopher Fast³
Michael Longyear⁴
Deborah Jameson⁵

¹ Not present prior to Executive Session; Admitted for Reconvene and Vote on Executive Session discussion.

² Not present prior to Executive Session; Admitted for Reconvene and Vote on Executive Session discussion.

³ Not present prior to Executive Session; Admitted for Reconvene and Vote on Executive Session discussion.

⁴ Not present prior to Executive Session; Admitted for Reconvene and Vote on Executive Session discussion.

⁵ Not present prior to Executive Session; Admitted for Reconvene and Vote on Executive Session discussion.

Public Comment
January 11, 2021

To:
Stacey Johnson
Manager, Office of Guardianship and Elder Service
WA State Administrative Office of the Courts (AOC)

cc:
WA State Certified Professional Guardianship (CPG) Board

December 1st, 2020

Dear Stacey,

Thank you for informing us at UW Continuum College regarding the decision by the CPG Board to continue to certify Guardians during the hiatus and redesign year for our Guardianship Certificate program. We do acknowledge the need for sufficient availability of Professional Guardians during this time, and that certification this year is dependent on fulfilling the following requirements set by the Board; completion of a CPG Board application, meet all Center for Guardianship Certification (CGC) requirements necessary to sit and pass the CGC National Certification test, and complete a two-day training to be provided by the AOC.

We do have concerns about the granting of full certification to students in this interim year and would like to propose that a provisional certification status be granted instead.

Our concerns are as follows:

- The National Certification test and materials do not reflect the comprehensive nature of the UW year-long education program, and WA State Guardianship standards of practice and compliance requirements are far more advanced (opinion of the WA Association of Professional Guardians, WAPG)
- The proposed two-day training by AOC is likely to provide good basic and foundational knowledge in the practice of Guardianship in WA state, but falls short in terms of the essential preparation for good professional practice that the UW program provides
- The time and financial investment for the interim training this year will be a fraction of the cost and effort of taking the UW program, which may be an incentive for people to get certified without sufficient preparation, and could result in grievance issues to follow
- The CPG Board's grievance investigators have been overwhelmed, and there is a backlog of complaints. Insufficient education and training could result in a new wave of grievances
- If many people take the opportunity to become certified during this interim year, with minimal investment required, it could be a disincentive for students to enroll for the Autumn 2021 launch of the new program, which could compromise the financial health of the UW program

UW Continuum College would like to work with the AOC and the CPG Board to ensure the best outcome all around for this hiatus year of our program, and for education and certification of Professional Guardians.

We therefore would like to propose the following:

- Provisional certification be given to students this year based on their meeting the CPG requirements, including interim training, as outlined above
- Presuming that interim training will suffice for the foundational Course 1 of our program, Course 2 and 3 could be opened for single course enrollment next year so that on successful

completion, hiatus year students could fully earn our certificate and convert from provisional status to being fully certified by the CPG Board. A waiver for Course 1 of our program could be given under these circumstances

- Going forward, we would also like to offer Course 2 and 3 of the Guardianship program as Single Course Enrollment options (SCE) for certified Guardians who would like to meet further professional education requirements. The updated and revised courses will now be fully online, and may be of interest to this category of students for maintaining certification

I would be very pleased to discuss our concerns and proposals further with you Stacey, and would like to share them with the CPG Board. I would also be happy to take you up on your suggestion of attending the January meeting of the CPG Board to further explore these issues.

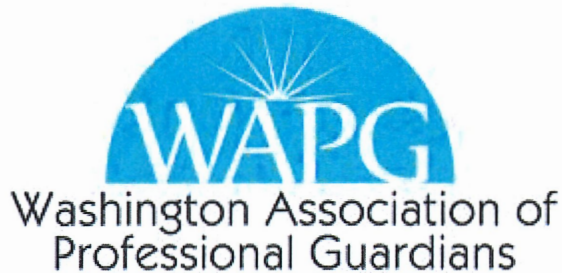
Thank you for your attention.

Sincerely,

Miriam Doyle

Program Manager for the UW Guardianship Certificate program

Miriam Doyle Ph.D. | Program Manager, Academic Programs | UW Continuum College
206-616-9019 miriamd@uw.edu / continuum.uw.edu
UW Tower, Box 359491, 4333 Brooklyn Ave NE Seattle, WA 981



5727 Baker Way NW Suite 200
Gig Harbor WA 98332
Toll Free 1-877-460-5880
Fax 253-265-3043

November 18, 2020

Judge Rachell Anderson
Chair, CPG Board
Via Email Only

CPG Board Members
Via Email Only

Thank you for your work as Chair and to the members of the Certified Professional Guardianship Board for their commitment.

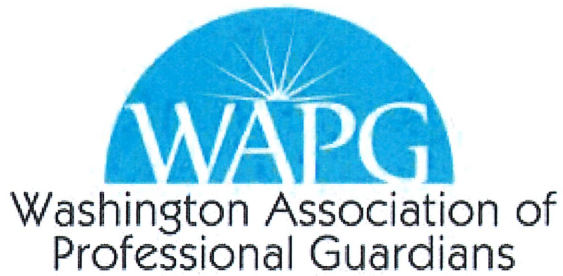
WAPG's members have raised concerns regarding the CPG Board discussing matters in closed-door meetings/sessions that would have been discussed in open meetings/sessions in past years. WAPG disagrees with the CPG Boards current approach and would request the CPG Board reconsider GR 23 proposed revisions be discussed in open meetings/sessions as in years past. This will allow for transparency and participation by the CPG's that the Board regulates. Please find below information that WAPG would request the CPG Board consider regarding this issue.

Contrary to Past Practice: The CPG Board has a history of open meetings/sessions. Attached is a letter from five past Chairs and Vice-Chairs of the Board who agree, closed-door executive-meetings/sessions should not be used for CPG Board discussions regarding anything other what is allowed in [GR 23\(c\)\(xii\)](#) or [CPGB 106.2.1](#).

Inconsistent with the Board's Rules and Regulations: By rule, CPG Board meetings are "open to the public". [GR 23\(c\)\(xii\)](#) While some closed-door meetings are required for discipline (and applications [CPGB 106.2.1](#), meetings should otherwise be "open to the public".

Supreme Court Committees: In addition to the CPG Board, the Supreme Court also regulates Interpreters. Like the CPG Board, the Interpreter's Commission (Chaired by Supreme Court Justice González) certifies, tests, and disciplines interpreters. The Interpreter's Commission holds "open meetings" and even publishes detailed minutes of their *sub-committee* meetings. (see: [June 5, 2020, 110 pages](#)). There is no precedent for Supreme Court regulatory boards and commissions to discuss policy matters in closed meetings/sessions.

The Board is not subject to the Open Public Meetings Act. However, the Board's history and rules follow the spirit of the Act. WAPG believes it is in the best interest of the CPG program to have all policy discussions "open to the public". WAPG is concerned with the Board's assertion that "preliminary discussions" such as GR 23 revisions can only occur in closed door meetings/sessions. There is no support for closed-door meetings/sessions policy discussions in the CPG Board's history, rules, or general trend of organizational transparency.



5727 Baker Way NW Suite 200
Gig Harbor WA 98332
Toll Free 1-877-460-5880
Fax 253-265-3043

Closed meeting/sessions discussions create a sense of mistrust and lack of transparency – the very antithesis of guardianship.

Very truly yours,

Gary Beagle, MMG, CPG OCPF
President
Washington Association of Professional Guardians

Enclosure: Letter From Past CPG Board Chairs and Vice Chairs
Cc: Chief Justice Debra Stephens, Chief Justice Steven González,

September 2020

Judge Rachelle Anderson
Chair, CPG Board

CPG Board Members

Dear Judge Anderson and CPG Board Members:

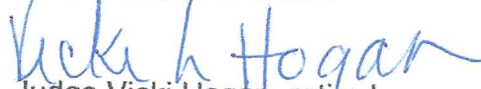
Thank you for your work as Chair and members of the CPG Board. As past Chairs and Vice Chairs of the Board, many of us were involved in the Board's creation and initial implementation. We strongly support the Board's oversight of Washington's Certified Professional Guardians.

In this oversight role, the Board conducts affairs as openly as possible pursuant to GR 23 which states "[m]eetings of the Board will be open to the public except for executive session, review panel, or disciplinary meetings prior to filing of a disciplinary complaint." (GR 23 (xii) Meetings)


In our experience, all research, reports, deliberations, discussions and decisions other than for discipline or qualifications for licensure were and should be held in open sessions. Simply put, closed-door Executive Session meetings were not, and should not, be used for discussions of the Board.


Thank you for service on the CPG Board.


Judge Marywave Van Deren, retired
Past Chair, CPG Board


Judge Vicki Hogan, retired
Past Chair, CPG Board


Judge Kimberley Prochnau, retired
Past Chair, CPG Board


Court Commissioner Stephen Gaddis, retired
Past Vice Chair, CPG Board


Court Commissioner Fred Aronow, retired
Past Vice Chair, CPG Board

Grievance Status Update

Certified Professional Guardians Grievance Status

Month-End

November 30, 2020

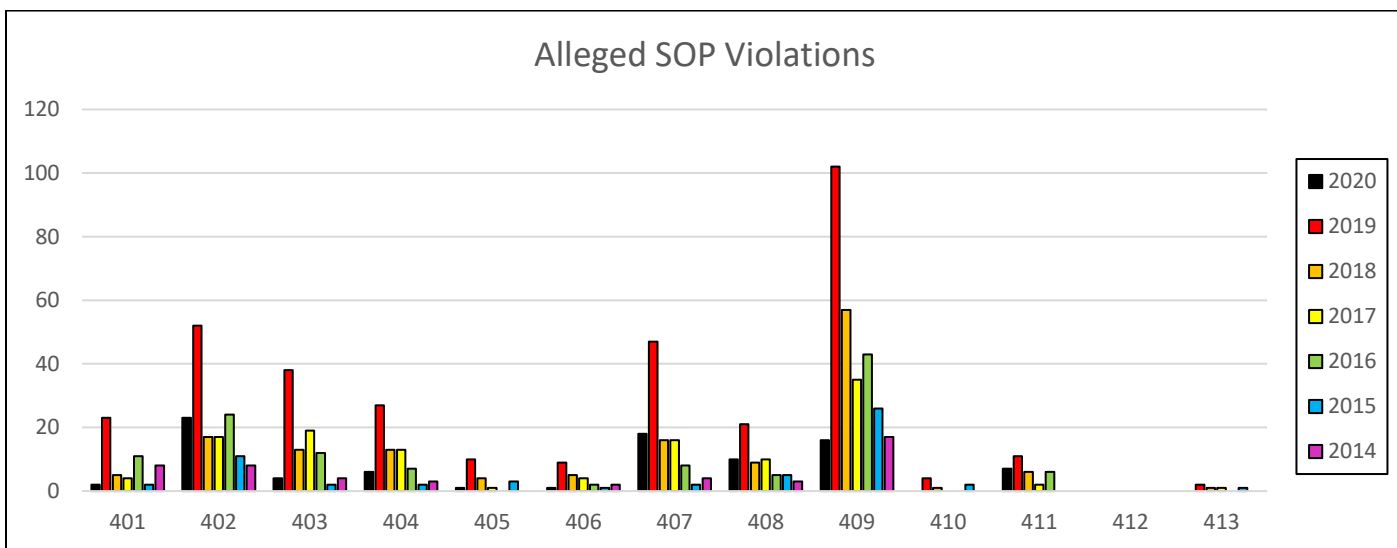
Grievance Status – November 30, 2020	2020	2019	2018	2017	2016	2015	2014	Total
New Grievances Received:	3	0	0	0	0	0	0	3
Grievances Resolved this Month:	[7]	[2]						[9]
Grievances Requiring Investigation*:	26	10	2	1	0	0	0	39

Grievances Pending*	2020	2019	2018	2017	2016	2015	2014	Total
Voluntary Surrender/Litigation:		5	1	1				7
Conflicts Review Committee:		1						1
ARD:								
Complaint/Hearing:			1		1			2
Administrative Decertification:								
Total Pending:		6	2	1	1			10

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

Resolution of Grievances – November 30, 2020	2020	2019	2018	2017	2016	2015	2014	Total
Dismissal – No Jurisdiction	1							1
Dismissal – No Actionable Conduct	4	2						6
Dismissal – Insufficient Grievance	2							2
Mediated – Dismissed								
Advisory Letter 507.1								
ARD - Admonishment								
ARD - Reprimand								
ARD - Suspension								
Terminated – Voluntary Surrender								
Terminated – Administrative Decertification								
Terminated – Decertification								
Total Resolved Grievances: November 30, 2020	7	2						9

Grievance Resolutions	2020	2019	2018	2017	2016	2015	2014	Total
Total Grievances Received	72	77	85	104	104	65	64	571
Dismissal – No Jurisdiction	19	15	22	30	20	13	17	136
Dismissal – No Actionable Conduct	24	34	50	59	55	29	22	273
Dismissal – Insufficient Grievance	3	5	3	1	2		2	16
Mediated – Dismissed						1		1
Advisory Letter 507.1		4	3	2	4			13
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	33
Termination – Voluntary Surrender			2	8	15	2	12	39
Termination – Decertification								
Grievances Resolved To Date: 11.30.2020	46	61	81	102	103	65	64	522



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	2010	3	2019 (1), 2020 (2)	
B	2014	4	2017 (1), 2019 (1), 2020 (2)	
C	2014	3	2020 (3)	
D	2007	3	2019 (2), 2020 (1)	
E	2001	6	2018 (1), 2019 (1), 2020 (4)	
F	2013	2	2018 (1) 2020 (1)	
G	2006	2	2020 (2)	
H	2001	2	2019 (1), 2020 (1)	
		25		

Of 39 currently open grievances requiring investigation, 25 concern 8 Agencies/CPGs with 2 or more open grievances.

	Year Guardian Certified	# of Guardians
Before UW Certificate Program	2001	2
	2002	
	2003	
	2004	
	2005	
	2006	1
	2007	1
	2008	
	Total	4
UW Certificate Program	2009	
	2010	1
	2011	
	2012	
	2013	1
	2014	2
	2015	
	2016	
	2017	
	2018	
	Total	4

Certified Professional Guardians Grievance Status

Month-End

December 31, 2020

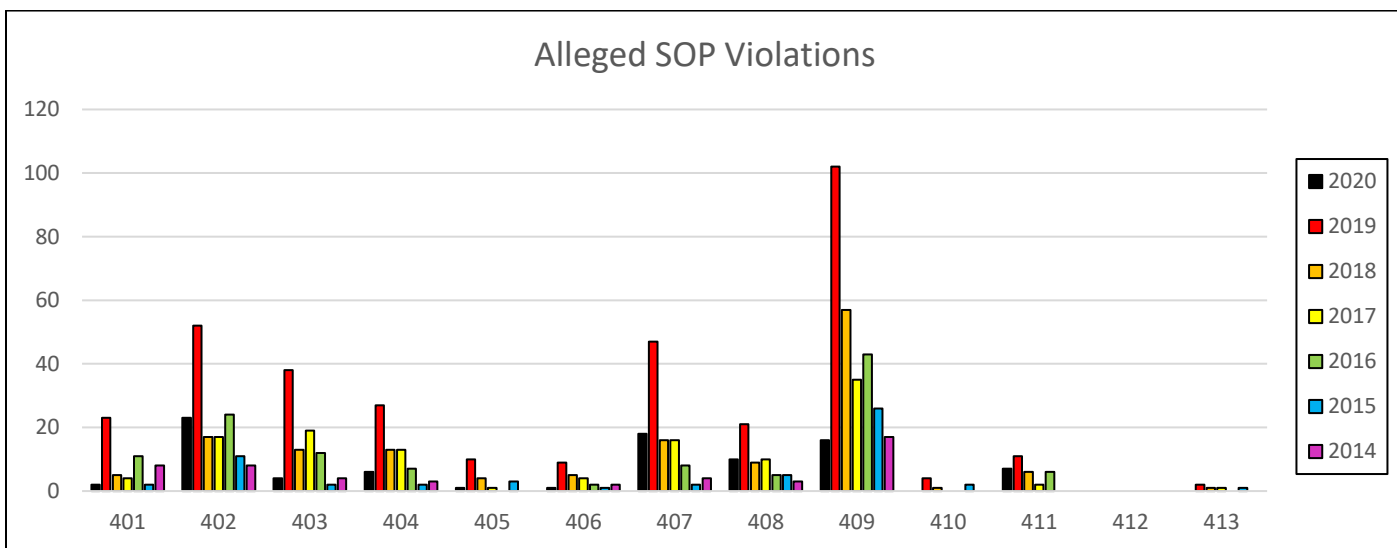
Grievance Status – December 31, 2020	2020	2019	2018	2017	2016	2015	2014	Total
New Grievances Received:	8	0	0	0	0	0	0	8
Grievances Resolved this Month:	[6]	[1]						[7]
Grievances Requiring Investigation*:	28	9	2	1	0	0	0	39

Grievances Pending*	2020	2019	2018	2017	2016	2015	2014	Total
Voluntary Surrender/Litigation:		5	1	1				7
Conflicts Review Committee:		1						1
ARD:			1					1
Complaint/Hearing:					1			1
Administrative Decertification:								
Total Pending:		6	2	1	1			10

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

Resolution of Grievances – December 31, 2020	2020	2019	2018	2017	2016	2015	2014	Total
Dismissal – No Jurisdiction								
Dismissal – No Actionable Conduct	6	1						7
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: December 31, 2020	6	1						7

Grievance Resolutions	2020	2019	2018	2017	2016	2015	2014	Total
Total Grievances Received	80	77	85	104	104	65	64	578
Dismissal – No Jurisdiction	19	15	22	30	20	13	17	136
Dismissal – No Actionable Conduct	30	35	50	59	55	29	22	280
Dismissal – Insufficient Grievance	3	5	3	1	2		2	16
Mediated – Dismissed						1		1
Advisory Letter 507.1		4	3	2	4			13
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	33
Termination – Voluntary Surrender			2	8	15	2	12	39
Termination – Decertification								
Grievances Resolved To Date: 12.31.2020	52	62	81	102	103	65	64	529



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

Pending Grievances Involving Guardians with Multiple Grievances
December 31, 2020

ID	Year Cert.	Open	Year(s) Grievances Received	Status
A	2012	2	2019 (1), 2020 (1)	
B	2010	2	2020 (2)	
C	2016	3	2020 (3)	
D	2014	4	2017 (1), 2019 (1), 2020 (2)	
E	2014	2	2020 (2)	
F	2007	3	2019 (2), 2020 (1)	
G	2001	7	2018 (1), 2019 (1), 2020 (5)	
H	2006	2	2020 (2)	
I	2001	2	2019 (1), 2020 (1)	
		27		

Of 39 currently open grievances requiring investigation, 27 concern 9 Agencies/CPGs with 2 or more open grievances.

	Year Guardian Certified	# of Guardians
Before UW Certificate Program	2001	2
	2002	
	2003	
	2004	
	2005	
	2006	1
	2007	1
	2008	
	Total	4
UW Certificate Program	2009	
	2010	1
	2011	
	2012	1
	2013	
	2014	2
	2015	
	2016	1
	2017	
	2018	
	Total	5

Education Committee Update



Office of Guardianship and Elder Services

ADMINISTRATIVE OFFICE OF THE COURTS

Dawn Marie Rubio
State Court Administrator

TO: Certified Professional Guardianship Board
FROM: Staff
DATE: January 5, 2021
RE: Update on the CPG 2021 Washington Supplemental Training (UW Hiatus)

Background:

In the spring of 2020, the University of Washington Continuum College (UWCC) notified the Administrative Office of the Courts Guardianship and Elder Services Office of its intention to put the Guardianship Certificate Program (the Program) on hiatus for the 2020-2021 school year. The UWCC is using the year to redevelop the Program to reflect the Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act (UGA). The UWCC also plans to use the time to move to an exclusively online format to improve accessibility to students across the state. (See May 4, 2020 letter attached hereto.)

The Applications and Education Committees held Joint Committee meetings in May and early June to address concerns related to the absence of the UWCC Program for the 2020-2021 academic year. Significant concerns included: conditionally approved applicants with no training option for an extended period; certification program viability in light of the gap in training availability; and most especially, the continuing needs of vulnerable persons in Washington requiring support from a professional guardian. In light of these considerations, the Joint Committee prepared a recommendation for the Board's June meeting.

At the Board's June 8, 2020 meeting, the Board adopted the Joint Committee proposal for the alternate training requirements for the limited period of the Program's hiatus year. Per the Board action, the alternate training requirements are available only to applicants applying by December 31, 2020, and must be completed by June 30, 2021.

Applicants applying in the designated period may complete the following alternative set of training requirements. (Applicants may also choose to wait and complete the Program when it resumes in the 2021-2022 academic year.) Applicants choosing to become certified pursuant to the alternate training requirements are required to complete the requirements for the Center for Guardian Certification (CGC), and pass the exam administered by the CGC, to become a National Certified Guardian (NCG). Applicants must also complete the Board's application and meet the related requirements of the Board (e.g. background

checks, credit history, education and experience requirements, etc.). The third requirement of the Board's alternate program is that applicants complete a supplemental training to familiarize applicants with Washington specific laws, regulations and practices. Per Joint Application and Education Committee and Board discussion, this course is designed to supplement the training requirements and preparation for the exam required for CGC NCG certification. AOC staff were directed to facilitate the development of a supplemental course of approximately 8-10 hours.

The Board's Education Committee has oversight of the supplemental course structure and content. The Education Committee has had extensive discussion of curriculum priorities given practicalities of the course parameters.

The supplemental course is scheduled to take place entirely remotely (via Zoom) on the following dates:

- Saturday, March 20th, 2021 (8:30 am -4:30 pm)

- Saturday, April 10th, 2021 (8:30 am -4:30 pm)

Each date will consist a total of six (6) hours of course time.

The dates of the course have been shared with applicants and publicized on the guardianship portal website.

Faculty for the supplemental course comprise multiple Certified Professional Guardians, guardianship attorneys, disability rights advocates, judicial officer(s), etc.

Course Curriculum Outline

The Board's Education Committee has decided on the following general course outline:

General Categories:

Washington's Guardianship Law:	3.0 hours
WA Guardianship Regulations and Ethics:	3.0 hours
Basics of Guardianship Finances:	2.0 hours
Care, Communication, and Cultural Competency	4.0 hours

Detailed Breakdown:

See matrix.



Office of Guardianship and Elder Services

ADMINISTRATIVE OFFICE OF THE COURTS

Dawn Marie Rubio
State Court Administrator

Education Committee - CPG Supplemental Training Course Curriculum Matrix

Law

<u>Topic</u>	Time (in quarter hours)
Guardian's statutory duties and limitations on authority in Washington, RCWs	.5
SOPs as guidance for professional guardianship practice	1.0
Legal procedures in guardianship and court reporting	.5
Abuse, neglect and exploitation	.5
The role of the CPG Board and professional responsibilities	.5
	Total Time:3.0

Regulations & Ethics

<u>Topic</u>	Time (in quarter hours)
Client-guardian relationship and fiduciary duty	.25
Identifying individuals potentially subject to guardianship, lesser restrictive alternatives and individual rights, residual capacity, substituted judgment and best interest standards, supported decision making	.50
Ethical decision making and conflicts of interest	.75
Primary roles of professional guardians: coordinator and decision-maker	.25
Daily practice of a CPG - responsibilities, challenges, and limitations	.75
Case timelines, checklists, guardianship attorneys, petitioning for instruction or ratification, modifying or terminating guardianships	.5
	Total Time:3.0

Financial

<u>Topic</u>	Time (in quarter hours)
CPG Business – how to start and operate, different business models, time tracking and billing	1.0
Finances and Accounting – how to approach guardianship of the estate/conservatorship, accounting and spreadsheets, bonding and blocking	.5
Navigating programs for the benefit of a client (cash, services)	.5
	Total Time: 2.0

Care, Communication, and Cultural Competency

<u>Topic</u>	Time (in quarter hours)
Communication challenges with clients and strategies for ascertaining information and associated skills	.5
Institutions and stakeholders in the guardianship process	.5
Complex decision making with respect to medical and care issues and end of life considerations, and financial issues	1.5
Residential placement and care options	.25
Cultural competency, communicating with family members, communicating with other professionals, dealing with difficult situations	.50
Substance use, mental health, and community resources	.50
Locating additional resources and continuing education, building community	.25
	Total Time 4.0:



Office of Guardianship and Elder Services

OFFICE OF PUBLIC GUARDIANSHIP
Stacey Johnson, Manager

May 4, 2020

Dear Certified Professional Guardianship Board, Certified Professional Guardians, and stakeholders:

The University of Washington Continuum College (UWCC) has advised the Administrative Office of the Courts (AOC) that UWCC must put the Guardianship Certificate Program (the Program) on hiatus for the 2020-2021 school year. The year will be used to redevelop the Program to reflect the newly passed Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act (UGA). The UWCC also plans to use this time to move to an exclusively online format to improve accessibility to students across the state. Providing greater accessibility to potential enrollees from all parts of Washington aligns with demographic trends and the need for entrants to the profession.

The AOC and the UWCC have been in discussions regarding the factors affecting the timeline for the redevelopment of the Guardianship Certificate Program. The UWCC previously planned on putting the program on hiatus for the 2021-2022 academic year. However, recent events and information have brought forth additional impactful considerations.

The effect of the COVID-19 pandemic has left uncertainty in the landscape of the 2020-2021 academic year. The social and economic impacts of the COVID-19 outbreak are unknown but expected to be significant. The potential for lower enrollment in the 2020-2021 academic year is substantial. UWCC informed the AOC that low enrollment would cause the UWCC to place the Program on hold for that particular academic year. While the future remains undefined for all at present, uncertainty is likely to decline over time.

The AOC made a 2020 session legislative request for Program redevelopment funding with input from the UWCC. The Program redevelopment funds request was premised on keeping tuition for the course at the current rate. The Legislature's appropriation for program redevelopment is only available in State fiscal year 2021 (July 1, 2020 to June 30, 2021). Washington State vulnerable adult demographics strongly indicate a continuing need for guardianship services in the state. Maintaining an affordable professional certification course is a critical issue, and ties directly to this appropriation.

May 4, 2020
Page 2

The AOC is sharing this information about the 2020-2021 academic year hiatus with all stakeholders as it is understood that this decision impacts all of the guardianship community.

Sincerely,

A handwritten signature in black ink, appearing to read 'Stacey Johnson', with a stylized, cursive script.

Stacey Johnson, Manager
Office of Guardianship and Elder Services

Mandatory Vaccination Discussion

From: AOC DL - ISD WEBMSTR
Sent: Wednesday, December 9, 2020 8:19 PM
To: AOC DL - Guardianship Program
Subject: Questions about Guardianship

Questions about Guardianship

The question below has been submitted to the Office of Public Guardianship. Besides this email, an Incident has been created in RightNow. Once you respond to the question, please close out the RightNow Incident.

Name: Jonete Rehmke
Email: jonete@rehmkelaw.com
Address:
Phone Number: 12534603190

Question:

I am an elder law attorney who represents Certified Professional Guardians. What is the Boards's position on vaccine's for the vulnerable population, elderly and disabled. My clients are getting pressure from facilites to vacinate their wards. Family meanwhile do not want their family member vaccinated, concerned about the side effects. My response to my clients was then we get infomation on the vaccine, doctor's recommendations and go to court and let judge decide. Facilities have threatened to evict the ward if not vaccinated. Only problem is their wards have been in living situations for long periods of time with close family relationships with other residents. I think this might be a situation for the Attorney General or the Governor to intervene. Jonete W. Rehmke 1021 Regents Blvd. Fircrest, Wa 98466 253-460-3190