



# **Guardianship Monitoring and Support Initiative**



**2024 Annual Report**

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## 2024 At a Glance

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In 2024, the Guardianship Monitoring and Support Initiative (GMSI) within the Office of Guardianship and Elder Services (OGES) focused on improving tracking capabilities by expanding and refining its services and fostering partnerships with various stakeholders.

Through the Administrative Office of the Courts (AOC), GMSI has supported Washington's non-unified court system by taking on a greater role in tracking and monitoring guardianships and conservatorships. A central hub for resources, recommendations, and on-demand support is essential to meeting the growing needs of the guardianship system.

Throughout the year, GMSI, in coordination with the Office of Guardianship and Elder Services, responded to numerous public inquiries. GMSI remained committed to providing clear, accessible guardianship materials and information to the public.

Team members engaged in training and professional development, including National Center for State Courts (NCSC) webinars, resource groups for guardianship professionals, and project management courses at South Puget Sound Community College.

Key areas of effort in 2024 included statewide initiatives, program development, and collaboration with counties to strengthen the guardianship system.

### Statewide Initiative: Case Reviews

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GMSI concluded 2024 with a review of over 5,400 guardianship cases since the program's inception. In partnership with Okanogan, Whitman, Yakima, and Thurston Counties, GMSI staff reviewed cases for compliance with reporting deadlines and Letter of Office expiration dates. Findings were presented to partner counties along with a detailed guide outlining the methodology and observations for each dataset. GMSI established procedures to address non-compliant cases and provided ongoing support to resolve these issues.

#### *Key observations from case reviews:*

- Few procedures exist for handling unreachable parties in guardianship cases
- Limited procedures are in place to identify or manage cases with late or expired Letters of Office
- Data entry and case maintenance practices vary widely by county
- There is no statewide protocol for exploring less restrictive alternatives



## Program Development: HUB (Helping, Understanding, Bridging)



The GMSI team created the HUB model to help drive long-term goals, projects, and program direction. These long term-goals focus on building an understanding of guardianship in Washington State as well as how to create better access to training and resources. Over the next five years the HUB project will focus on:

- Building statewide partnerships with counties, educators, and other constituents
- Compiling guardianship resources and materials for agencies, courts, and lay guardians
- Creating online and physical self-help materials for guardians, clerks, and superior courts
- Supporting the development of translated materials for non-English communicators
- Launching an education and outreach campaign for guardianship topics and less restrictive alternatives
- Building a robust framework for GMSI to involve students and volunteers

The HUB model focuses on four key components: Project One, Lay Guardian Tool Kit, Web-Based/Smart Choice Interpretive Resource Tool, and Marketing/Education Campaign. These services are currently under development.



**Project One's** goal is to contract with one student to support one county with one task. GMSI partnered with Pacific Lutheran University (PLU) to recruit a student for the opportunity to work on guardianship tasks with GMSI and AOC. Beginning in 2025, this student intern will support GMSI staff 8-12 hours per week to help develop resources and collaborate with staff in the program's development. The student will learn about the court system and about vulnerable populations with an opportunity to provide feedback on improving services and projects.



The **Lay Guardian Toolkit** is comprised of guardianship and conservatorship information, self-help resources, forms, and checklists to assist and provide guidance to lay (non-professional) guardians. The goal is to have an online and physical printed prototype available mid-2025 through the AOC or partnering counties.



GMSI partnered with AOC's Information Services Division's Web Services department and the Office of Communications and Public Outreach to update the OGES guardian portal website. The revamp of the OGES website marked the beginning of the development of GMSI's **Smart Choice (Web-based) Interpretive Resource Tool**. This tool is a user-friendly web resource that can assess what users need through a series of prompts and guides them to appropriate resources. It also educates the user on less restrictive alternatives. Updates to the OGES website and launch of the Smart Choice tool are coming in 2025.

## Collaboration With Counties

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GMSI maintained relationships with several county partners and staff across Washington State. We will continue to strive towards collaborative work to strengthen these partnerships and communication.

We have identified several common themes from these partnerships:

- There is insufficient support for lay guardians and underrepresented litigants, but growing needs for guardianship or other alternatives
- Courts and Clerk's offices do not have enough staff to meet the needs of their communities in guardianship matters
- Courts and Clerk's offices welcome support from AOC and GMSI, fostering ongoing dialogue between AOC, Court Administration, and the Clerk's Office

To address these issues, GMSI requested funding through a state decision package and a federal grant proposal to create guardianship facilitator positions in pilot counties. These funding requests were unsuccessful and GMSI redirected its efforts toward strengthening existing guardianship resources and education available through the Courthouse Facilitator Program.

## Conclusion

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In conclusion, the past year brought significant progress for GMSI, including advancements in program development, cross-county collaboration, and the creation of valuable resources for guardianship stakeholders. GMSI remains committed to supporting courts, protecting the rights and well-being of vulnerable individuals, and ensuring guardians receive the support they need.