



Guardian Monitoring Program Workgroup Meeting

Tuesday, April 12, 2022

Zoom Meeting

8:00 a.m. – 9:00 a.m.

Meeting Minutes

Members Present

Ms. Sujatha Jagadeesh Branch
Ms. Jacalyn Brudvik
Ms. Arielle Finney
Ms. Ana (Forston) Kemmerer
Ms. Julie Higuera
Mr. David Lord
Ms. Audrey Pitigliano
Ms. Jane Severin
Mr. Daniel Smerken
Ms. Tracie Thompson

Staff

Ms. Amber Collins
Ms. Heather Lucas
Ms. Alexis Pullen
Ms. Nichola Russell

Members Not Present

Judge Nancy Retsinas

Guests – No guests invited/admitted

1. Meeting Called to Order

Ms. Amber Collins called the April 12, 2022 Guardian Monitoring Program (GMP) Workgroup meeting to order at 8:02 a.m.

2. Welcome

Ms. Collins welcomed all present and spoke about the meeting agenda.

3. Recap & Updates

a. Welcome – Regional Volunteer Coordinators Alexis Pullen and Nichola Russell

Ms. Collins stated that the GMP hired two Regional Volunteer Coordinators since the last GMP Workgroup meeting. She introduced Ms. Alexis Pullen and Ms. Nichola Russell and asked them to introduce themselves to the Workgroup.

Ms. Pullen stated she formerly worked at the Department of Social and Health Services (DSHS), and is coming into this role with a little knowledge regarding how to structure this program. She stated she has two dogs and two teenagers.

Ms. Russell stated her career background is in volunteer engagement, and she has a lot of experience in building operations. She added that she previously worked at the Employment Security Department (ESD), and it was her first experience in state government. Ms. Russell stated she also has two dogs and a son who did two tours in the Army. He is now home settling into civilian life.

b. Visit to Snohomish County/Upcoming Visits to Benton & Franklin Counties and Spokane County

Ms. Collins stated that since the mask mandate has been lifted, GMP staff will begin conducting in-person visits to counties. She stated that she and Ms. Heather Lucas travelled to Snohomish County in March to visit the Snohomish County GMP staff. Ms. Collins stated she believes in-person visits are important. She stated GMP staff will be visiting Benton & Franklin Counties and Spokane County at the end of this month. She stressed that getting out there is helpful for GMP transparency and development.

c. Funding Proposal – Concept Paper Submitted

Ms. Collins stated that GMP staff discussed how the volunteer operation is an important component of the GMP. Ms. Collins stated that she requested \$40,000 for 2023 via a concept paper to supplement the volunteer operation. She stated that the funding would enable the GMP to conduct more formal trainings and pay for food, travel and any other costs incurred by volunteers working for the GMP.

d. No GMP Workgroup Meeting on 4/27/2022

Ms. Collins informed the GMP Workgroup that the meeting scheduled for April 27, 2022 will be cancelled as GMP staff will be travelling to Benton & Franklin Counties that day.

4. Discussion Topics

a. GMP Regions Established

Ms. Collins asked Ms. Lucas to share a regional map of Washington State with the GMP Workgroup. Ms. Lucas shared a DSHS map via Zoom function and Ms. Collins stated the GMP is going to split the state into three regions, mirroring the shared map. Region 1 consists of all counties east of the Cascade Mountains: Adams, Asotin, Benton, Chelan, Columbia, Douglas, Ferry, Franklin, Garfield, Grant, Kittitas, Klickitat, Lincoln, Okanogan, Pend Oreille, Spokane, Stevens, Walla Walla, Whitman and Yakima Counties. Region 2 consists of Island, King, San Juan, Skagit, Snohomish and Whatcom Counties. Region 3 consists of the remaining Western Washington Counties: Clallam, Clark, Cowlitz, Grays Harbor, Jefferson, Kitsap, Lewis, Mason, Pacific, Pierce, Thurston, Skamania and Wahkiakum Counties.

b. Training and Education – Office of Guardianship and Elder Services

Ms. Collins stated that Ms. Kay King, Senior Court Program Analyst with the Office of Guardianship and Elder Services, will be providing training and education components for the GMP. Ms. King will start May 1st with additional online trainings focused on specific questions from lay guardians. Ms. Collins stated that the training format will be specific to the needs of a county.

Ms. Collins stated that the GMP will market the trainings as they become available. She added that trainings will be live Zoom trainings held twice a month starting on May 1st. Ms. Collins stated that when GMP staff has meetings with counties across the state, staff will let court-appointed guardians know the trainings are available.

c. Resources Available without Partnership

Ms. Collins stated that counties who are not interested in the GMP, or who have been hesitant in partnering with the GMP, will have limited resources available to them. She stated the in-house case management system and the volunteer operation will not be available to these counties. Ms. Collins stated the GMP will continue to provide accommodations best suited to help a court or person subject to guardianship.

Mr. Daniel Smerken stated he was interested in the case management system and asked Ms. Collins if she could describe what it looks like. He also asked if GMP staff will receive help from county clerks, for example, will clerks populate info from reports or will they send them to the GMP. Ms. Collins stated GMP staff is waiting for a meeting with IT for updates, and she's not sure how they're going to pull info or if they'll have data entry. Ms. Collins stated she wants to have an in-depth conversation about the case management system with IT, then have a conversation with the GMP Workgroup.

d. Deliverables

Ms. Collins stated GMP staff will work on a clear outline and understanding as far as solidifying partnerships by with counties by June 2022. She stated she will send a Project Implementation Plan (PIP) to each county about how the GMP is launching each component, and list specific launch dates. Ms. Collins added she wants to solidify deliverables for the Workgroup in May 2022.

Ms. Collins stated that each county will receive a memorandum of understanding (MOU) dictating the working relationship between a county and the GMP. She stated that GMP staff will work with Administrative Office of the Courts (AOC) staff regarding the drafting of county MOUs. Ms. Collins stated the MOUs will define parameters and intent in each county.

Ms. Collins clarified that the MOU is a written agreement establishing rules between both parties, since there isn't oversight of the GMP over the courts or oversight of the courts over the GMP. She added the MOU is best document to establish rules and responsibilities to respectfully conduct operations in a county and ensure no one steps on any toes.

5. Open Floor Discussion

Ms. Collins opened the floor to questions or discussion from GMP Workgroup members. Ms. Julie Higuera asked if the Regional Volunteer Coordinators are established in a specific region. Ms. Collins replied they are not as staff is still working out tasks and objectives for those roles.

Mr. David Lord asked about GMP volunteer responsibilities. Ms. Pullen replied that the Regional Volunteer Coordinators are still working on that, and stated the two easiest volunteer roles are researcher and auditor. She stated the researcher needs to check if forms are in compliance and turned in on time, and the auditor ensures everything is above board. Ms. Pullen added GMP staff is still working to see what the volunteer roles look like.

Ms. Pullen stated that the volunteer monitor, previously known as visitor, is difficult to define as GMP staff are still discussing this role. Ms. Russell stated she was thinking about the monitor position as a liaison role between courts and guardians, mostly because the GMP would work with lay guardians. She added it will be a compelling role for people to want to engage. Ms. Russell added that GMP staff is looking at how that role helps meet GMP objectives.

Ms. Pullen stated the argument regarding monitoring has to happen equitably, and that the idea that volunteers have a role in enforcement isn't possible at this time. She added the role is more about getting information that people need. Ms. Pullen stated that she knows from previously working with Adult Protective Services (APS) that this volunteer role could be a person who points to community resources and helps guardians figure out what to do as opposed to catching people in a situation.

Ms. Russell stated that the monitor role could build rapport in the community, and volunteers can be essential in building relationships and enhancing trust in the community as they're usually part of the community already.

Ms. Collins stated that this topic was going to be discussed at next meeting, but as there was time, she stated GMP staff are looking at the three volunteer roles: auditor, researcher and monitor. She stated GMP staff needs to determine what the monitor role does and if the monitor role should conduct in-person visits.

Ms. Collins asked Ms. Pullen and Ms. Russell to share their ideas about how they envision the monitor role. Ms. Pullen stated she understands in-person visits were previously discussed in the GMP Workgroup. She added she understands a "court visitor" in the [UGA](#) is essentially a Guardian ad Litem. She stated this person isn't going into court on behalf of a person subject to guardianship.

Ms. Russell stated that she and Ms. Pullen have been reaching out to other states about their GMPs to talk about how to engage volunteers. She stated that New Jersey has an interesting set up and Utah utilizes court visitors through the entirety of a guardianship. She added GMP staff have to think through what the environment is and learn efficacy of utilizing volunteers, as other counties and states are utilizing volunteers effectively in many ways.

Ms. Russell stated that volunteer roles will change through the development of the GMP and staff have to be able to create the best version of the GMP right now. She added the liaison/monitor role will probably be refined the most over time, but emphasized all volunteer positions will evolve. She stated that in conversations with other counties and states about how their GMPs evolved over time, she's noted that the roles have changed. Ms. Pullen agreed with Ms. Russell and stated that some programs and roles were more complex. She added GMP staff doesn't know what the GMP will look like in individual counties, whether researchers will be going through stacks of return-to-sender mail, and GMP staff doesn't know logistics right now.

Ms. Russell stated GMP staff can be really nimble and respond to what we're learning in the community and adapt positions to the counties. She stated the three volunteer roles are pillars encapsulating three objectives the GMP wants to accomplish. There will be a structure and a main framework to build from with the MOUs. GMP staff would fine tune how the program rolls out in each county.

Ms. Collins stated GMP staff will present a model and framework about volunteer operations at the next GMP Workgroup meeting. She added that there was a concern about unannounced visits and they will not be practiced by volunteers at this time. Ms. Collins stated that if a volunteer has reason to believe that audits or information given needs to be further investigated, the GMP would refer to the proper authorities.

Ms. Pullen stated that she understands the GMP Workgroup has had discussions regarding the authority of an in-person visit. She stated that an organization like DSHS doesn't just walk up to a door. She added that she thinks the liaison role will vary based on what's happening in a community already. Ms. Pullen stated that this process for volunteers and GMP staff will be accumulating resources. She added she didn't want to call the role a "case manager," but she thinks it's more akin to a case manager knowing how to tap into resources in the community.

Ms. Collins stated she will give Ms. Pullen and Ms. Russell more time to present what they're discussing regarding the volunteer operation at the next meeting. Mr. Lord stated he has a high degree of interest here, and is looking forward to the May meeting. He added he's interested to know how the volunteer operation would relate to the person subject to guardianship. Ms. Pullen stated the liaison can extend between the court and the guardian. Ms. Russell stated that if GMP staff sees the liaison role helps a guardian fulfill their role as a guardian, the GMP will need that component. She stated that what's missing in the GMP is what's happening after a guardianship is established.

Ms. Pullen stated a person subject to guardianship has as much of a right to request support from the GMP as their guardian. She added there are ways to build rapport. Ms. Pullen stated she hoped she didn't convey that GMP communications were only to a guardian and no one else.

Ms. Russell reiterated that the volunteer roles are evolving positions, and GMP staff need to start with a specific and clear role for the liaison position, then learn and grow. She stated she's willing to be surprised by how much the GMP gains from a community.

Ms. Pullen stated she came out of a court living program in RCS (Residential Care Services) and has a gauge on folks in the community in her background. She stated there are people living in communities that have guardianships, but is not sure how less restrictive alternatives are discussed. She asked if a volunteer sees something problematic, what the chain of command is.

Mr. Smerken asked post adjudication what is the volunteer's responsibility is if a volunteer believes a guardian has a duty to come to court if a less restrictive alternative is available or if a person subject to guardianship is requesting restoration of rights. Ms. Russell replied that there's lots to think about on the operational side, like risk management, levels of training and protocol. She added that the GMP doesn't want to put anyone in any kind of danger, so GMP staff has to be careful about who is brought on board. Ms. Russell stated the screening and interview process needs to be thorough and the questions Mr. Smerken brought up will have to be worked out.

Ms. Pullen stated that if a retired social worker applies to be a GMP volunteer, there will be a different experience and spectrum of knowledge than a volunteer with a different type of background.

Ms. Collins stated there will be a lot of conversations, and GMP staff will continue to address questions and concerns at the next meeting. She added the Regional Volunteer Coordinators will present the volunteer operation model and framework. Ms. Collins stated many things have changed for the GMP since the beginning of this year. Ms. Pullen stated she is optimistic that meetings in next few weeks will answer a lot of these questions

Ms. Collins stated that GMP staff will begin revisiting with counties that she and Ms. Lucas already met with in the next few weeks.

6. Wrap Up/Adjourn

The next Guardian Monitoring Program Workgroup meeting will take place via Zoom Conference on Tuesday, May 10, 2022, at 8:00 a.m. With no other business to discuss, the April 12, 2022 meeting was adjourned at 8:43 a.m.