



Guardian Monitoring Program Workgroup Meeting

Tuesday, May 10, 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. Julie Higuera
Mr. David Lord
Judge Nancy Retsinas
Ms. Jane Severin
Mr. Daniel Smerken

Staff

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

Members Not Present

Ms. Ana (Forston) Kemmerer
Ms. Audrey Pitigliano
Ms. Tracie Thompson

Guests – No guests invited/admitted

1. Meeting Called to Order

Ms. Amber Collins called the May 10, 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. Travel to Benton & Franklin and Spokane Counties

Ms. Collins reported GMP staff met with Ms. Julie Higuera and Ms. Jessica Ramsay in Benton & Franklin Counties on 4/27/2022. GMP staff met with Ms. Ana (Forston) Kemmerer and Ms. Kristina Hammond on 4/28/2022. Ms. Collins stated travelling was exhausting, but really great.

b. Pilot Program (not originally on agenda)

Ms. Collins reported the GMP is choosing three pilot counties instead of five, and will determine the counties based on population and demographics. She reported Clark County is participating,

and added if a smaller county wants to participate, GMP might expand the pilot program to include four or five counties. Ms. Collins stated the GMP is expecting to finalize counties in June 2022.

4. Discussion Topics

a. GMP Framework – Volunteer Operations

i. Terminology Change for “Volunteer Monitor”

Ms. Collins stated the GMP Workgroup got an opportunity to meet the Volunteer Operations (VO) team at the last meeting. She stated she wanted Ms. Alexis Pullen and Ms. Nichola Russell to share about the VO and volunteer roles.

Ms. Russell shared a PowerPoint presentation about the VO. She stated she learned a lot from visits to Benton & Franklin and Spokane Counties, and she particularly appreciated how in Spokane County the GMP engages volunteers. She added it was helpful to see in action and it affirmed the VO structure and framework.

Ms. Russell stated the VO vision and purpose flows from the GMP mission and vision. She addressed the VO vision: The GMP Volunteer Operations envisions a future where community volunteers actively partner with the courts to support the efforts of guardians and conservators and promote the visibility, rights and agency of vulnerable adults. She added that’s the future GMP staff want to see.

Ms. Russell stated the VO’s purpose: The GMP Volunteer Operations recruits, trains and supports volunteers to serve in roles that strengthen the court’s oversight of guardians increasing the courts’ ability to mitigate risks of abuse, neglect and exploitation, and protects the rights of vulnerable adults subject to guardianship.

Ms. Russell moved to the next slide and stated VO objectives may shift overtime as the GMP becomes more defined. She stated a VO objective is to define volunteer roles to complement the work of court staff and increase their capacity to monitor guardianships. She added getting in there and defining roles is a critical piece.

Ms. Russell stated another VO objective is recruit, equip and deploy volunteers to strengthen the court’s oversight of guardians. She stated the last VO objective is increase the court’s ability to mitigate risks of abuse, neglect and exploitation, and protect the rights of adults subject to guardianship.

Ms. Russell stated the specific volunteer roles are modelled after other GMPs and invited Ms. Pullen to address the GMP Workgroup. Ms. Pullen stated an interesting thing about this process is learning how these roles have changed. She added that what GMP staff is finding, and what was learned from Spokane, is when volunteers find a problem, it gets passed to paid staff.

Ms. Pullen stated GMP staff is thinking about standardized forms for streamlining guardianship processes. She stated the types of support guardians receive is different in all counties. Ms. Pullen spoke about roles in the VO and stated the auditor role in Benton & Franklin Counties is different than the same role in Spokane County.

Ms. Pullen stated the guardian liaison role has changed the most: it’s gone from “monitor” through a few iterations, but GMP staff now want it to be an educational or support

role. She stated the liaison role is not someone who's catching a guardian doing something bad, they're not out to catch people. Ms. Pullen stated if there's an unannounced visit, that might be beyond the scope of this volunteer.

Ms. Pullen stated Benton & Franklin Counties and Spokane County both need assistance in helping guardians fill out forms. She stated Benton & Franklin Counties staff said they don't have the bandwidth to do it, but they do it anyway. She added Spokane County staff said they don't assist, but know there's a need.

Ms. Russell stated the guardian liaison position has shifted the most over time, but they're the eyes and ears out there to keep a communication link and connection between guardians and courts. She added that role will impact how GMP staff thinks about training. She stated GMP staff will give volunteers the tools to observe and identify issues for the court, and GMP staff is still working out those processes.

Ms. Pullen stated she saw varied real opportunities where providing a little support would free up resources for county staff and make it possible for them to focus more on other things they need to be doing. Ms. Russell stated she thinks in the pilot program, the GMP will fine-tune these roles, how they roll out, and evaluate regularly.

Ms. Russell spoke about the VO framework, adding it's how everything is pulled together. She stated the framework is an outgrowth of the GMP. She added as the GMP is moving toward implementation with three pilot counties, the VO is thinking about strategy, how to engage volunteers, and defining volunteer roles. Ms. Russell stated defining roles informs everything else, and roles need to be tailored to each county.

Ms. Russell stated the VO will have screening and protocols in place. She stated staff is working on how to match a volunteer to a county. She spoke about developing an orientation process for training and ongoing development to support a volunteer's skill sets.

Ms. Russell stated GMP staff need to think through ongoing supervision and support, all mechanisms so volunteers get the support they need, evaluation, and whether the VO is accomplishing objectives. She stated GMP staff will conduct ongoing evaluations of the marketing strategy and retention, and will fine-tune training as the program develops.

Ms. Pullen stated GMP staff spent a lot of time as a team in the last week regarding how GMP would take up county staff time.

Ms. Collins stated she wanted to acknowledge Ms. Russell's and Ms. Pullen's efforts in building, developing, and finding a vision for the VO. She added they have a big vision for this program, and is certain under their guidance the VO will succeed.

Mr. David Lord submitted a question via the Zoom chat option that Ms. Collins read aloud: "Did you get any ideas from the counties you visited (esp. Spokane) on where to look for volunteers, recruitment strategies, etc.? How about how to reward and show appreciation so you can retain them?" Ms. Russell responded that GMP staff got ideas from Spokane County GMP staff about building relationships with Eastern Washington University, and GMP staff is thinking about reaching out to colleges and universities. She stated it's a strategy other counties use.

Ms. Russell added Benton & Franklin Counties used to have a volunteer program and they shared their info with GMP staff. She stated they have former judges as volunteers. Ms. Russell stated a volunteer program isn't sustainable if there are no volunteers supporting the work. Ms. Collins stated there has to be engagement and support for volunteers and GMP staff understands retaining is important. Ms. Collins added she knows there will be a need for additional funding and GMP staff might have to be creative until additional funding is in place.

Ms. Russell stated an important component of retention is volunteer experience. She stated a volunteer can be rewarded and incentivized, but if they're having a bad experience, they won't stay. She stated the GMP wants to make sure volunteers feel competent and supported, and not afraid or bored. Ms. Russell stated GMP staff has to critically think through every essential element from the beginning, like how to match volunteers to counties, training, support, and how to handle challenges. She added the GMP will have appreciation events.

Ms. Pullen stated the volunteer liaison role will be particularly enticing for those who want to serve as that role helps people understand how to have a complex interaction with the courts. Ms. Russell concurred and stated it's important that a volunteer feels like they belong and matter.

Mr. Daniel Smerken stated Ms. Pullen mentioned something about volunteers assisting with court forms, and wondered which form she was referring to. Ms. Pullen stated it was the annual reporting form. She stated it's complex and people don't understand the accounting portion in particular. She added one of the reasons to partner with universities is access to accounting students. Ms. Pullen stated Spokane County GMP staff had a relationship with a professor at Eastern Washington University who would tie the liaison role to the class by having accounting students work through cases. Ms. Russell added Spokane County GMP shared that students really enjoyed this, and the way it was structured was a good experience for everyone.

Ms. Sujatha Branch stated she loves what was said about accounting students, and emphasized they could be great for this work. She asked if GMP staff have thought about the volunteer interaction with courts, families or persons subject to guardianship in terms of retention. Ms. Pullen replied absolutely, and added she could walk up to any door as she's worked with these situations. She stated a volunteer may not be comfortable with medical equipment in a house, or interacting with someone who is developmentally disabled. She stated there's a lot that goes into walking into those situations, so GMP staff will match the volunteers to those situations. Ms. Russell added volunteers are more than volunteers: they're human beings with a vast array of experiences. She stated there will be people who understand some roles and those who don't. Ms. Collins stated there will be a lot of training in how to adapt to environments that are challenging.

b. Engaging with Washington State Tribes

Ms. Collins stated the GMP doesn't want to overlook Washington State tribes in regard to the GMP. She added she understands there are intricacies and sensitivities in working with tribes, and wants to get an idea as to how it may work in regards to the GMP.

Mr. Smerken stated he could offer his experience in tribal courts if that's what Ms. Collins was looking for. Ms. Collins replied yes, as GMP staff is not sure where to pursue working with tribes in the GMP. Mr. Smerken replied in case GMP staff is not aware, each tribe is a sovereign nation, has its own court, and has its own code in regard to guardianship. He added he works most frequently with the Nisqually Tribe and Squaxin Island Tribe.

Mr. Smerken stated the Squaxin Island Tribe adopted [RCW 11.88](#), which is much more consistent with state law, but the Nisqually Tribe didn't. He stated the Nisqually Tribe doesn't really distinguish between adult and minor guardianships, which may be problematic. He added the Nisqually Tribe doesn't operate under [RCW 11.130](#), and they don't object to the use of state patterned forms, but aren't really using them.

Mr. Smerken stated if a CPGC is working in a tribal court, they're still bound by the rules of professional conduct just like an attorney. He added for lay guardians, he's not sure where the nexus is.

Mr. Smerken stated if the GMP wants to serve tribal courts, they'd probably have to approach courts individually and reiterated he wanted to share his experience. Ms. Collins thanked him and stated the GMP is not emphasizing engaging with tribal courts yet, but the GMP team wondered about approaching tribes and wanted to bring the question to the GMP Workgroup.

Ms. Branch stated [Northwest Justice Project](#) has a [Native American Unit](#) that has a lot of experience with tribes and tribal courts. She added they work in advocacy and might be a resource when moving forward.

c. Investment of County Staff Time

Ms. Collins stated the biggest question the GMP has encountered is investment of county staff time. She shared the Project Implementation Plan (PIP) via the Zoom screen share tool and explained it's how the GMP is going to integrate into counties. She stated there are three different phases in the implementation process that will require staff time and investment and GMP staff is trying to figure out if it is practical and reasonable.

Ms. Collins explained phase one is the discovery phase where GMP staff will conduct an in-depth analysis in the county where a Memorandum of Understanding (MOU) is established. She stated GMP staff might require two to three hours per week during this phase from county staff, virtually or physically in-person, to navigate and answer questions. She stated GMP staff understand a lot of counties don't have full-time staff in guardianship cases, or they have staff who hold dual responsibilities, adding she understands it's hard to give up time.

Ms. Collins stated during phase one, two to three hours may be practical, but as GMP staff move through the phases, a decline in hours occurs. She stated the decline begins in phase two, which is implementation.

Ms. Collins asked the GMP Workgroup if the time investment stated is practical, and if they see any risk or hurdles. She added GMP staff believe investment in time is needed from county staff in the first two phases when trying to implement the GMP. She added the GMP can't go in and take over guardianship practices, but need to have candid conversations to understand current processes in place. Ms. Collins asked the GMP Workgroup if they have any suggestions regarding being more practical.

Ms. Julie Higuera replied she thinks the GMP has done a great job getting a plan in place. She added current county staff have to meet with GMP staff and there's no getting around a time investment, but the investment will be well worth it. Ms. Collins stated GMP staff

have spoken to a lot of counties that have part-time staff, so the GMP is trying to figure out how to impact staff time.

Ms. Collins asked Ms. Higuera if the GMP partners with Benton & Franklin Counties, how realistic would it be for Ms. Higuera and Ms. Jessica Ramsay to meet two to three hours per week. Ms. Higuera responded Benton & Franklin Counties staff could meet one hour on both Mondays and Thursdays. She added there's no getting around it.

Ms. Pullen referred to Ms. Russell's comments about programs succeeding, adding GMP staff are really taking on the responsibility for keeping the program sound, having spent a lot of time trying to answer this question. Ms. Russell stated everyone the GMP has met with so far is running on a gerbil wheel, adding it's hard to imagine jumping off and doing work that stops everything to focus somewhere else. She stated GMP staff doesn't want staff to stop what they're doing or create more work. She added meeting with staff is an attempt to pull them off the wheel and get them going again as soon as possible.

Judge Nancy Retsinas submitted a comment via the Zoom chat option: "So depending on staff availability, the length of time for implementation may need to be flexible. This may be part of the MOU – to specify the time commitments for implementation and the length of time for implementation." Ms. Collins replied the full launch with all moving components of the GMP is spring 2023, and all moving components and resources are up and running. She stated there's no specific time for implementation in each phase. Ms. Collins stated the PIP states implementation is 30, 60 or 90 days, but the need to be flexible is real. She added some people are numbers people who need tentative or estimated timeframes.

Ms. Higuera asked about the extent of the volunteer program and assistance in each county, stating some counties will want a lot and some will utilize a small component. Ms. Collins stated the GMP is trying to figure out what is needed and will develop these resources. She stated a county may not need all resources as they might have an auditor or records researcher, but might need a liaison to meet with guardians. She added resources will be tailored to the specific needs of each county.

Ms. Higuera asked if the MOU is something that is updated yearly or is subject to change. Ms. Collins replied the MOU will be evaluated annually, but if there's a need to discuss change in the MOU, the GMP is open to that. Ms. Russell added the MOU for the pilot group will look different than the MOU when the GMP is ready to launch as there will be systems in place, and the MOU will recognize the initial investment of staff time. Ms. Russell stated the pilot is about learning the best way to structure the GMP.

Ms. Jane Severin asked if the GMP has presented to the [Superior Courts Judges' Association](#) (SCJA). Ms. Collins replied no. Ms. Severin emphasized that courts work from the top down, so if judges think something is great, it will work down to administrators. Ms. Collins thanked Ms. Severin and stated GMP staff will look into meeting with the SCJA. Ms. Pullen added GMP staff met with the presiding judge in Spokane County.

Mr. Lord stated he was still a little fuzzy on the timeline, and doesn't know where things fit in terms of chronology. Ms. Collins stated the PIP outlines the GMP initiative, which she will send to the Workgroup at a later date. She stated the target launch of the GMP is spring 2023, where the operation is running fully. She added the PIP gives an overview of the phases and the timeline of phases. Ms. Collins stated phases may be longer or shorter depending on the

work needed, and GMP staff is thinking this is a three to seven-month implementation that leads into next year, which is why pilot counties are being finalized in June 2022.

6. Wrap Up/Adjourn

The next Guardian Monitoring Program Workgroup meeting will take place via Zoom Conference on Tuesday, June 14, 2022, at 8:00 a.m. With no other business to discuss, the May 10, 2022 meeting was adjourned at 9:00 a.m.