



Guardian Monitoring Program Workgroup Meeting

Tuesday, December 14, 2021

Zoom Meeting

8:00 a.m. – 9:00 a.m.

Meeting Minutes

Members Present

Jacalyn Brudvik
Arielle Finney
Julie Higuera
David Lord
Audrey Pitigliano
Judge Nancy Retsinas
Jane Severin
Daniel Smerken
Tracie Thompson

Staff

Ms. Amber Collins
Ms. Heather Lucas

Members Not Present

Sujatha Jagadeesh Branch
Ana (Forston) Kemmerer
Chris Fournier

Guests – No guests invited/admitted

1. Meeting Called to Order

Ms. Amber Collins called the November 9, 2021 Guardian Monitoring Program (GMP) Workgroup meeting to order at 8:00 a.m.

2. Welcome

Ms. Collins welcomed all present and spoke about the meeting agenda. The presentation by Ms. Ana Forston Kemmerer could not occur as Ms. Kemmerer was unable to attend.

3. Email from Mr. David Lord RE: His Thoughts on Essential Features of the GMP

Mr. David Lord sent an email to the Workgroup minutes prior to the meeting and Ms. Collins asked him to discuss the email with the Workgroup. Ms. Heather Lucas shared the email with the group via the screen share feature. Mr. Lord emphasized having a standardized training oriented towards decision making, and thinks lay guardians and court visitors should be made aware of the training.

Ms. Collins asked if Mr. Lord is suggesting Administrative Office of the Courts (AOC) employees train county court visitors and stated that an AOC Senior Court Analyst currently

provides training webinars. Ms. Collins also clarified that training would be focused on lay guardians. Mr. Lord agreed.

Ms. Collins revisited a point from the last meeting: How can the GMP use Adult Protective Services (APS), and asked how APS practices will be adapted to the [new law](#). Ms. Arielle Finney, current APS staff, responded that some things will change, but current practices will remain for investigations and responding to allegations. Ms. Finney stated the main changes revolve around filing for conservatorship or guardianship. Ms. Collins asked if APS has to seek less restrictive alternatives before seeking a guardianship and Ms. Finney confirmed. Ms. Collins asked if APS visits a person in a pending guardianship. Ms. Finney confirmed that APS doesn't get involved in monitoring unless there are concerns, but does 30-day visits when APS is the petitioner. Concerns with alleged perpetrators are investigated, but general monitoring will not be conducted.

Ms. Audrey Pitigliano stated that monitoring is very little if any, from the perspective of someone who previously worked at Rainier School. She stated a position had to be developed for monitoring. Ms. Pitigliano stated that lay guardian training is more about the whole aspect of guardians, whereas finance is something someone else manages. She also stated lay guardians need more awareness of the new law. Ms. Collins indicated training will be more focused on lay guardians as there's a current structure for Certified Professional Guardians. Mr. Lord stated less restrictive alternatives and supported decision making should have more of a focus before a guardianship or conservatorship is undertaken.

4. Pilot Program for Washington State Counties

Ms. Collins stated that GMP staff has begun reaching out to Washington State counties to partner as pilot programs for launching the GMP statewide.

Judge Nancy Retsinas asked if any counties have implemented guardian facilitator programs in Washington as there's a statute that counties have to implement these programs. Judge Retsinas stated she hasn't heard if any are active, but they seem a natural fit if a county has funds. Ms. Collins replied that when reaching out to counties she found there are people who handle guardianships informally, mostly a contact person who monitors guardianships. Judge Retsinas suggested a long-term conversation establishing guardianship facilitator programs to self-represented folks with complete wrap-around services. Judge Retsinas shared the guardianship/conservatorship program is [RCW 11.130.165](#).

5. Discussion: Creation of a GMP Database Tool and Needs

Ms. Collins informed the Workgroup that GMP staff have been working with internal IT staff to create a tool for guardian monitoring and were looking for input on what features the tool should have. She emphasized the tool would be used by GMP staff and volunteers. Ms. Collins expressed that the tool would have features the Workgroup has already expressed a need, like events that trigger notifications.

Ms. Jane Severin stated she uses tickle dates for Odyssey, but specified that it's only for hearing dates. She emphasized having tickle dates in advance for report dates, like when a report is due, would be very helpful for guardians who may need an attorney to assist them. Ms. Severin stated she'd send examples of the types of dates to Ms. Collins. She also said that

attorneys trying to schedule hearing dates months after a report date may not know the true 90- or 120-day time frame because they're difficult to manage.

Ms. Collins asked about the best way to receive notifications. Ms. Severin thinks a report that is emailed to a person would work best. Ms. Julie Higuera stated it would be nice to have the ability to generate a monthly or weekly report. Ms. Higuera said that receiving an initial report and periodic reporting would be helpful as sometimes accounts are blocked. She also stated "click-on dates" would be a good addition.

Ms. Severin said it would be nice to have a more interactive training for lay guardians that was in-person, with an interactive portion to explain less restrictive alternatives. Ms. Collins asked if instead of an online training, if an interactive Zoom meeting for less restrictive alternatives work, and Ms. Severin agreed.

Mr. Smerken sent a case summary to the group as an example of a great place to get dates to integrate into the tool. He also stated it'd be helpful to know what model the tool will be based on as the Spokane GMP is excellent, but requires a lot of volunteer work, is very time-consuming and labor intensive. Ms. Jacalyn Brudvik stated the Snohomish GMP is also time-consuming as reviewing financial accounting for 14 cases would take a full day.

Ms. Collins told the Workgroup that GMP staff will be expanding in the future. Volunteer coordinators will be hired in 2022 with a focus on auditing cases. Mr. Smerken reiterated that auditing cases is labor-intensive and time-consuming and wanted to make sure GMP staff were aware. Ms. Brudvik said it'd be wonderful if there was outreach to make being part of the GMP a community service as there won't be money on a county-wide basis to pay GMP. She also suggested the future coordinators do outreach to get people who are interested or with specific skill sets to volunteer. Ms. Collins stated that the volunteer coordinators would have the responsibility to conduct outreach. Judge Retsinas stated that there needs to be recognition of the fact that Washington State isn't a unified court system, and each county has different needs.

6. 2022 Meeting Dates

Ms. Collins stated that a second GMP Workgroup meeting date will be added each month beginning in January. Essentially, the meetings will cover the same topics, but provide more attendance opportunities.

7. Wrap Up/Adjourn

The next Guardian Monitoring Program Workgroup meeting will take place via Zoom Conference on Tuesday, January 11, 2022, at 8:00 a.m. With no other business to discuss, the December 14, 2021 meeting was adjourned at 9:00 a.m.