

Email from Mr. David Lord

(Email addresses, contact info and email string redacted)

Tue 12/14/2021 7:55 AM

RE: REMINDER: Scheduled GMP Workgroup Meeting, Tomorrow December 14th, 2021

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Dear Members of the Guardianship Monitoring Advisory Group,

At the end of our November meeting, I said I would provide the committee with my personal take regarding what the essential features of guardianship monitoring programs. I apologize for being delinquent in fulfilling my pledge to do this; and especially because I am providing my list of proposed essential features just prior to our meeting.

We have a full agenda today, I see, but I hope we can discuss our ideas about what are necessary components of a guardianship monitoring program soon.

-David Lord
(Redacted)

Here are some of my suggestions for essential components of guardianship monitoring:

1. Training:
 - a. Lay Guardians and Conservators. Spokane's model is to provide training to all new guardians that focuses on compliance with court filing requirements, and includes the judicial officers in the training. Lay guardians should learn about Standards of Practice (SOP) and training should include orientation to less restrictive options.
 - b. Standardized. Training should have component that is specific to jurisdiction, but also include standardized curriculum developed by state AOC with assistance of this advisory committee or other source.
 - c. Court Visitors. Court visitors should be trained by the GMP regarding the operation and resources of the GMP.
 - d. Technical assistance. Training should be supplemented with offer of help from the GMP staff for guardians, conservators, and court visitors who get stuck with a problem and need direction (not legal advice)
 - e. Less restrictive options. Where supported decision-making or "other protective arrangements" are adopted instead of guardianship, ,
2. Involvement of people with disabilities and seniors and their advocates in program development, governance and provision of services.
 - a. Advisory board with significant presence of advocates, representatives of diverse communities
3. Assistance with questions, complaints for individuals subject to guardianship/conservatorship (ISGC - formerly "incapacitated persons -IPs")
 - a. GMP should be available and respond to requests for assistance from ISGC with technical assistance

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4. Review all guardian/conservator reports. All reports should be reviewed. Spokane uses volunteer accountants to check on financial reports. Monitoring of other information on reports should also be monitored.
5. Volunteer use. Spokane has managed with a volunteer program, but it takes paid staff to closely supervise, recruit, train, and reward/motivate volunteers. GMP program should have a plan for how volunteers will be trained and recognized for their commitment.
6. In-person visits. GMP should have capacity to visit the ISGC in their own home or environment.
 - a. Annual/regular, esp. where new guardianship or problems
 - b. More frequent visits where complaint or grievance or irregularities
 - c. GMP visitors should be trained in how to recognize signs of abuse
 - d. GMP visitors should know local social service resources
 - e. No exceptions for facilities or homeless
7. Commitment to less restrictive options
 - a. Training for staff, board, guardians on less restrictive options
 - b. Review of filings to determine if ISGC could be served with less restrictive option.
8. Connection with court visitor program. The court visitors should be trained by the GMP on their services and expectations, and coordinate with the GMP.
9. Local court procedures and forms. The GMP should be involved in the development of local court procedures and forms. GMP staff and board will understand the impact of changes in procedures or forms on lay guardians and ISGC and should be at the table when changes are considered.
10. State standards/connection with state court administration. The AOC should develop standards and resources available for all GMP programs. AOC should assist in developing uniform data collection and consistent expectations of quality and services.
11. Outreach and recruitment plan to diverse communities, displaced/homeless, people with disabilities. The program should have a plan for ensuring representation from diverse communities in staff, advisory board, and procedures that are welcoming, accessible services
12. Standards of Practice (SOP). Obviously, there is an expectation that the CPG will comply with the SOP – in addition, lay guardians should be trained in the standards. The eventual goal should be that all guardians uphold the SOP.
13. Documentation of Outcomes. The GMP should keep data that are consistent in form and compatible with statewide data collection. The GMP should be track information about the guardians, including information related to trends, successes and problems.
14. Commitment to long term funding. GMP should be considered an essential court service, and not subject to elimination of drastic fund reduction in difficult times.