

Oregon WINGS General Meeting Minutes

Wednesday September 11, 2019

Oregon Judicial Department
Juvenile & Family Court Programs Division
1133 Chemeketa St NE, Salem, OR 97301

Attendees: Lauren Holland, Katherine Tennyson, Rebecca Southard, Shauna Haney, Theresa Hollis, Emily Braman, Christian Hale, Deborah Howard, Bryan Marsh, Leola McKenzie, Hon. Patrick Henry, Victoria Blachly, Mary Jaeger, Leslie Sutton, Jan Freidman, Chris Rosin, Paula Boga, Ellen Klem, Maureen Nash, Fred Steele, Valerie Eames, Melissa Dablow, Mark Sanford, Channa Newell, Bryan Marsh, Jan Freidman, Whitney Yazzolino

Introductions

Judge Holland

Called to order 9:00 AM

Consent Calendar

Approved Minutes June 12, 2019

Grant Update and Budget

Bryan Marsh

- WINGS grant ended at the end of June, submitted the final reports to ABA WINGS, waiting for final approval.
- Leola explained that the JCIP program had started with a grant for from the ABA
- Judge Holland has been appointed to a national panel for Law and Aging through the American Bar Association. She is currently reviewing the document: "Implementation Guide for Modernization of Conservatorship Monitoring." In Oregon alone, there is estimated to be close to \$1 Billion in conservatorship. Hoping to apply for a grant to implement an auditing program for conservatorship in Oregon. Judge Holland asked stakeholders at the table to comment on where they see mis-use occur or other comments they have on accountings/monitoring/auditing of assets.
 - Theresa Hollis states every county does a different type of auditing, not consistent county to county. Suggested that forensic auditors receive consistent training throughout the state.
 - Judge Holland- had clerk looked at all judicial districts, 13 of 27 have adopted the same form.
 - Pilot project needed to obtain funding to be able to address the issues, collecting data is an important part of this.
 - Mary Jaeger ODBCS Money managed by veterans and held in the treasury stated that there may be a possibility of partnership
 - Is data differentiating between family and business conservatorships?
 - Is there a way for protected persons to be notified of what is happening with their money?
 - Jan Friedman reports that they protected persons are not getting information about their finances as the years go by.
 - Judge Holland states that notice is required, however the laws may not be enforced the same across the state.
 - Fiduciary may have changed the protected person's mailing address. Statutorily they are complying by mailing notices out to the protected persons, however they don't actually receive their mail.

- Consider change the notice requirement from mailing to in person. Having annual accountings require guardian hand delivered to protect the person instead of personal service requirement which may have a cost.
 - Leslie Sutton noted that many protected persons don't always open their mail or have someone to help them go through each piece and explain the importance.
 - Jan noted that many protected people don't receive mail at all.
 - Volunteers would be needed to help protected persons understand what the accountings mean.
- Bench Book on Conservatorships may help for consistency across the state.
 - Central accounting? Smaller judicial districts just don't have the same resources.
 - Judge Holland states that a proposal will be created and presented to OJD- please contact Leola, or Judge Holland if you have more information that should be considered.

WINGS Membership

Leslie Sutton

- Leslie Sutton: reviewed the document "Oregon WINGS Membership Principles"
- Should there be terms? Should Agencies be appointed, or should individuals?
- Who else should we invite? A family guardian, people from more rural counties (how without funding?), tribal representation, Latino groups, someone on criminal side helping us figure out how do guardians fit in with criminal proceedings, Gender identity groups, (basic rights of Oregon was suggested), NAMI (mental illness), Department of Education, Financial workers. Lack of capacity crosses all groups, so any advocacy groups would apply it's just a matter of locating groups whose missions align with WINGS.
- It was suggested to have one group that wants to keep informed of group happenings, and then a separate group on the Committee. People can be on subcommittees of their interest and not be in larger group.
- Steering committee will work on the document and present it to the group.
- There were concerns about making the group formal, why would we exclude any individual from participating? Public comment requirements? Judge Holland explained that this group does not make rules or submitting positions. Is this considered a public meeting?

PR Project

Theresa Hollis

- WINGS "Get a Life Plan" website, Shauna Haney is working on the content and will be updating the page.
- PR piece to get people to come to the web page. Scrambling to find resources but working to create story boards- animated video, hoping to have it ready to go by October 1, 2019.
- How to get the word out? PEBB and OEBB will link to our website.

Train the Trainer

Paula Boga

- Training Pilot 6/25/19, group has not met since the project, the group will meet next week, and finalize the feedback and make changes.
- Feedback from the general group was very positive.
- The final product is a power point presentation to train other professionals with a guide.
- The next step is where, who and how this will be presented statewide.

Update Stakeholder Projects

All

- Paula Boga- just wrapped up a year long Train the Trainer project for Supported Decision Making, a one page info graphic geared towards youth and a separate one for family focusing on transition age youth. They just ordered 5000 copies- and will share PDF with the group. In the process of requesting grant funds from United Way to role out the program throughout the state.
- Leslie Sutton- Waiting to hear about grant application from ACL for the Oregon Council on Developmental Disabilities which will allow them to focus on coalition building and focus groups to get everyone on the same page regarding supported decision making in Oregon. Not having the bill pass will allow Oregon to watch other states and the impacts on different populations, etc.
- Theresa submitted Flyer Guardian Partners benefit “Partners Party” and explained the mission of Guardian Partners.
- Chris Rosin-Strategic Development Plan for the Public Guardian Program:
 - The current total staff of 6, including 4 deputies, with monthly face to face visits, caseloads are set at 20 per deputy- very intensive, making sure person centered. Driving time with current staffing is averaging 40 hours per month per deputy.
 - The plan addresses what would be needed to make this program sustainable to serve the entire state. Increasing to 15 deputies throughout regional offices in the state, with 3 lead deputies, a manager, assistant deputy, and a volunteer deputy guardian program that could serve over 500 people.
 - 2 million dollar biannual program, however fiscals have not been completed yet. There is a time delay when looking for a third party filing to help with cost. The program must use DOJ for legal services. Working on getting representative support. Gathering data on impacts of the program, Chris gave some specific examples of how Public Guardianship has impacted the need for accessing emergency services for non-emergent services, kept people out of hospitals, mental hospitals, and penal system. Every dollar invested in Public Guardians is a dollar saved to hospitals, law enforcement, etc.
- Leola reported that Jeff Hall, TCA for Deschutes– they received their grant, focus groups now, in November they are doing a guardianship summit for Central Oregon. He took the mapping project from WINGS as his inspiration. She will send the group information.

Roundtable Discussion of Trends and Issues

- In early August, a group went to Charlottesville, VA to attend STAGES Pilot Institute. Futures Without Violence, in collaboration with the National Council of Juvenile and Family Court Judges, a two-day pilot institute for judges, court staff and community members to address financial exploitation and abuse of older adults.
 - Participants did several case studies of financial exploitation, teams from all over the US, identified gaps in the system, barriers to reporting, exploring how can we improve.
 - Elder abuse is under reported and under investigated. How to make courts more accommodating; hearing devices, remove sharp edges in court rooms, set hearing times not too early or too late in the day, etc.
 - The group wrote up recommendations for Oregon, including more consistent follow up on annual accountings not filed, auditing of accountings, noting solutions should be considered for smaller counties as well. It was suggested for each county to get together with local resources to identify gaps and improve reporting and response to elder abuse.
 - A speaker at the conference, Dr. David Franklin, SCR School of Medicine in California spoke on temporary incompetence related to medical conditions, insomnia, infections, etc. The

group discussed the topic/speaker would of interest at future trainings in Oregon- possibly though the SFLAC.

- Ellen Klem, - Elder Abuse Conference has only 30 spots left, and some of the issues addressed at the STAGES Pilot will be addressed at the conference.
- Using Social Media: podcast from New York issues reforming guardianship. Judge Holland noted that Pod cast would be a good way to get information out to a lot of people.

Legislation

- Updates
- Channa Newel working with House and Senate Judiciary Committee. Deadline to submit bills for Short Session is 11/22/19, restrictive cap on number of bills that can be presented.
- ICWA update may be of interest, not too much is known yet.
- Significant work in the session and the next over issues surrounding behavioral health.
- Leslie Sutton- Don't be alarmed if you see their pending grant on the consent agenda set for 12/17, as they are required approval from the legislature to apply for grants and due to the timing, they had to submit the grant application prior to receiving official approval.
- Process for submitting a WINGS bill- although WINGS cannot write a bill, or make recommendations or suggestions without going through the Chief Justice. The topic of WINGS framework came up again as far as what can WINGS do regarding the legislature, see WINGS Membership Update.

Wrap up and next Steps

Judge Holland

Meeting Ended 11:00

Next Meeting scheduled for Wednesday, December 11, 2019 9-11 AM.