

# Oregon WINGS General Meeting Minutes

## Wednesday, September 14, 2022

Oregon Judicial Department  
Juvenile & Family Court Programs Division at OJD  
Meeting held via WebEx

**Attendees:** Hon. Patrick Henry, Jan Friedman, Chris Rosin, Marc Kochanski, Fred Steele, Allison Enriquez, Jeff Brandon, Christy Reese, Eugenia Liu, Sherry Stock, Theresa Hollis, Victoria Blachly, Chris Madden, Matt Shields, Whitney Yazzolino

OJD Staff: Bryan Marsh, Nanci Thaemert, Jeffrey Petty, Cristina Guillen

### Introductions

**Bryan Marsh**

Called to order by Bryan Marsh 9:00 AM.

Minutes approved for June 8, 2022.

### Get a Life Plan

**Theresa Hollis**

Mark Sanford worked with Multnomah County on an ad campaign that highlighted Get a Life Plan and directed viewers to the website. We saw an increase in hits to the website during the campaign. Since then, the numbers have gone down. As we move into future projects, we will brainstorm ways to get the word out about the website. If your organization has newsletters, feel free to include an article about it and our [link](#). The purpose of the page is to inform people about how to put their plan in place to make things easier for themselves and their family. There is a lot of information in English and Spanish about wills, trust, power of attorneys, transfer on death deeds, and advanced directives.

### Website Update

	Since Last Meeting (6.8.22-9.14.22)	Year to Date (1.1.22-9.14.22)	Last 30 Days (8.14.22-9.14.22)
WINGS Home Page	674	1,925	233
WINGS GALP	413	4,474	120
WINGS GALP Spanish	31	265	8

### Train the Trainer

**Bryan Marsh**

We have begun recording the Curriculum on PowerPoint. Once that is completed, it will be posted on the website with the rest of the materials. We are tracking who accesses the materials through a questionnaire that asks for their name, organization, and purpose for accessing the materials. The group will be discussing dissemination and future projects.

### Publication Update

**Bryan Marsh**

We are breaking down the pieces of the publications and assigning out sections for revision. We will meet soon to keep that moving forward.

## **Roundtable Discussion**

### **Change Management**

**Bryan Marsh**

We sent out a survey to the entire WINGS group to vote on what our next projects should be. The responses were:

#### **#1: Person-Centered Planning Guide**

Note: Focus will be on the respondent/protected people. Great support tool for anyone working with the individual and can be helpful in framing how you can support the individual. Ties in well with “training for court visitors.”

#### **#2: Strategize how to disseminate educational tools and information**

Note: We may need a separate group for this. A priority would be looking for funding. This group could pull together the resources and opportunities. We will discuss this at the next Steering Committee meeting.

Tied for #3:

#### **Uniform qualifications and training for court visitors**

Note: OJD’s State Protective Proceedings Advisory Committee has already started working on this. We could collaborate with them or just leave it up to them.

#### **Overcome the disconnect between resources and advocacy aimed at elders and the developmental disability community**

#### **Expand guardian partners statewide**

#### **Centralized hub for resources and services**

Note: We envisioned our website as taking on this role. We would like to expand the website, but this may require a separate workgroup.

#### **Mandate fiduciary education statewide**

Note: would possibly require a statutory change.

#### **Standard practices, alternatives to guardianship and support decision making**

We will need to determine what the top priorities are. We will continue the discussion at the Steering Committee and the December WINGS meeting.

## **Legislative Updates**

**Bryan Marsh**

SB 578 is in effect in Multnomah and Lane County. The primary concern is finding attorneys to do the work. Some of the courts may be able to have out of county attorneys appear remotely. OPDS has hired Morgan Fitzgerald to work on this bill. Morgan has been reaching out to courts across the state to discuss the hurdles and get feedback. She has been invited to our December meeting to provide us with an update. More developments to come.

## **Stakeholder Project Updates**

### **OJD/ACL Elder Justice Innovation Grant**

**Jeffrey Petty**

We conducted a statewide assessment, guided by the Advisory Committee, of the probate work in each county. The idea of the assessment was to get a sense of what the patterns are and focused initiatives. Part of that work was sending a series of surveys and going through the collected data. All responses were corroborated by looking at Odyssey case files. We developed a data sheet on each county, and we will talk to the folks about where they are at and what they want to work on. We are taking ideas from the assessment to propose interventions and improvements to how state courts monitor state protective proceedings. Christian Hale has been working on the development of a statewide centralized conservatorship auditing program that is rolling out with some counties this month. Jeff has been working with an analyst to improve the data dashboard and expand/improve data collection. The dashboard is not available to the public, but data can be requested. The first annual grant report is due at the end of the month.

An internal OJD SharePoint site has been set up for judges and court staff. That has been an on-demand resource for these individuals to access various resources such as checklists on petition, guides about notice expectations, and business process guides. OJD is also hosting a monthly lunch and learn meeting. There is a different training topic at each meeting. There are typically 30-40 judges and staff who attend and those who cannot attend can access the recording from the website.

### **Other:**

Guardian Partners is now serving Jackson County. The Partners Party fundraiser is back in person on Wednesday, September 28<sup>th</sup>. [Visit here to purchase admission and learn more.](#)

### **Public Comments and Involvement**

No public comments received.

Next Meeting: December 14, 2022

Meeting Ended 10:44 a.m.