

## Directions

The Matheson Courthouse is at 450 South State Street.

If you take Trax, Courthouse Station is the closest stop on the N/S Line. From there the courthouse west entrance is about ½ block. On the University Line, the closest stop is Library Station, about 1½ blocks from the east entrance.

If you drive, we can validate your parking if you park at the courthouse. Public parking (Level P2) is accessible only from 400 South, eastbound. If you are already west of the Courthouse, drive eastbound on 400 South and turn right into the driveway about mid-block between Main and State. (Don't go to the parking garage for the old First Security Building.) If you are east of the Courthouse, take 500 South to Main Street, turn right, and then right again on 400 South. Enter the driveway as above. Bear to the left as you descend the driveway. A deputy sheriff might ask you your business at the courthouse. After parking, take the elevator to the first floor rotunda.

The courthouse has airport-type security, so leave whatever might be considered a weapon in your car.

We are in the Judicial Council Room in Suite N31. To get to Suite N31, take the elevator to the 3d Floor. The elevators are near the east entrance to the building. Then turn left as you exit the elevator.

# Agenda

## Court Visitor Steering Committee

May 31, 2011  
2:00 to 4:00 p.m.

Administrative Office of the Courts  
Scott M. Matheson Courthouse  
450 South State Street  
Judicial Council Room, Suite N31

Introduction of members	Tab 1	
Selection of chair		
Meeting schedule	Please bring your calendar	
Recruitment of coordinator	Tab 2	
Program design	Reading materials	

**Committee Web Page:**

**Meeting Schedule**

May 31, 2011

# Tab 1

Mr. Kent Alderman  
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Ms. Mary Jane Ciccarello  
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Hon. George Harmond  
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Hon. Keith Kelly  
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# Tab 2

## Court Visitor Coordinator

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### (1) In general

There are two full-time, temporary positions funded by a grant from the State Justice Institute. The funding expires \_\_\_\_\_. In accordance with SJI regulations, the persons appointed to these positions will be considered contractors and not employees. There are no insurance or retirement benefits. The appointee must pass a background check.

Under the general supervision of the Senior Staff Attorney, the Coordinator will design and implement a court visitor program for guardianship and conservatorship cases in the district court. The visitors will be community volunteers. The ultimate objective is a statewide visitor program.

In a guardianship case, the judge must decide whether the respondent is legally incapacitated, whether to appoint a guardian for the respondent, and what authority to grant to the guardian regarding the respondent's person. In conservatorship cases the judge must make similar decisions regarding the respondent's estate. The judge may appoint a "court visitor" to gather evidence to help make the decision. The visitor also has a role after the appointment of a guardian or conservator, ensuring that the court's orders are being followed and that the respondent is protected.

### (2) Court visitor coordinator responsibilities

Under the general supervision of the Senior Staff Attorney, the **Coordinator** will design, build and support the court visitor program. Some of the steps include:

- Develop community partnerships (AARP, Area Agencies on Aging, CPAs, lawyers, law students, law enforcement, social workers, service providers, etc.)
- Recruit volunteers, conduct background checks maintain necessary and appropriate records
- Assigns volunteers to cases, matching the volunteer's skills to the needs of the case
- Develop training materials
- Develop and conduct training classes for volunteers
- Develop and conduct training classes for judges & court staff
- Supervise, evaluate and recognize volunteers
- Troubleshoot problems
- Develop checklists, forms, & other aids
- May participate in a visitor's investigation

- Record and report outcomes, especially problem cases
- Report recommendations for program development and modification
- Administrative duties

### **(3) Court visitor responsibilities**

Before appointment of a guardian or conservator, a **visitor** provides judges with a means to gather information about a respondent's circumstances independent of the parties and interested persons. Some of the steps include:

- Interview the respondent and proposed fiduciary
- Interview family members and others as appropriate
- Visit the respondent's current and proposed residences
- Report to the court
- Attend hearings and possibly testify

After appointment of a guardian or conservator, a **visitor** provides judges with a means to evaluate management plans and annual reports and to further investigate a protected person's circumstances. Some of the steps include:

- Review inventories, management plans and annual reports of guardians and conservators
- Review other records
- Interview the protected person, fiduciary, family members and others as appropriate
- Visit the protected person's residence
- Report to the court
- Attend hearings and possibly testify

### **(4) Knowledge, Skills and Abilities**

Graduation from college with an associate's degree in the behavioral sciences, communications, social sciences, humanities, or related degree; four years related experience; or any equivalent combination of education and experience.

Knowledge of guardianship and conservatorship law and process; knowledge of court management practices; ability to organize and work with community groups, caregivers and others; Understand the dynamics of the needs and protection of incapacitated persons.

Knowledge of community services available to incapacitated persons.

Knowledge of recruiting practices, particularly recruiting volunteers.

Demonstrated skill serving as a volunteer, preferably in the area of service to the elderly, children or vulnerable adults.

Ability to interview fiduciaries, respondents, protected persons, and their family and friends, care providers, clergy, colleagues, others.

Ability to perform complex duties requiring the exercise of independent judgment.

Ability to establish and maintain effective working relationships with judges, court staff, representatives of public and private agencies, and the public.

Ability to communicate effectively, verbally and in writing, including ability to compose letters, memos and reports; ability to follow oral and written instructions.

Knowledge of business English and arithmetic, spelling, vocabulary and grammar, filing, and considerable knowledge of office methods and techniques; working knowledge of bookkeeping and budget tracking.

Skill in typing and operating office equipment, including a computer and office software programs.

#### **(5) Miscellaneous**

No special physical demands are required to perform the work. Typically, the employee may sit comfortably to perform the work. However, there may be some walking; standing; bending; carrying of light items such as papers, books, small parts; driving an automobile, etc.

There are the risks found in the typical office setting, which is adequately lighted, heated and ventilated, e.g., safe use of office equipment, avoiding trips and falls, observing fire regulations, etc.

The position may require occasional travel.

## Court Visitor

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### (1) In general

This is a part-time volunteer position without salary or benefits. The volunteer must pass a background check.

Under the general supervision of the Court Visitor Coordinator and at the direction of the district court judge, the Visitor will gather and report evidence concerning respondents and protected persons in guardianship and conservatorship cases.

In a guardianship case, the judge must decide whether the respondent is legally incapacitated, whether to appoint a guardian for the respondent, and what authority to grant to the guardian regarding the respondent's person. In conservatorship cases the judge must make similar decisions regarding the respondent's estate. The judge may appoint a "court visitor" to gather evidence to help make the decision. The visitor also has a role after the appointment of a guardian or conservator, ensuring that the court's orders are being followed and that the respondent is protected.

### (2) Responsibilities

Before appointment of a guardian or conservator, a **visitor** provides judges with a means to gather information about a respondent's circumstances independent of the parties and interested persons. Some of the steps include:

- Interview the respondent and proposed fiduciary
- Interview family members and others as appropriate
- Visit the respondent's current and proposed residences
- Report to the court
- Attend hearings and possibly testify

After appointment of a guardian or conservator, a **visitor** provides judges with a means to evaluate management plans and annual reports and to further investigate a protected person's circumstances. Some of the steps include:

- Review inventories, management plans and annual reports of guardians and conservators
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### **(3) Knowledge, Skills and Abilities**

Graduation from college with an associate's degree in the behavioral sciences, communications, social sciences, humanities, or related degree; four years related experience; or any equivalent combination of education and experience.

Knowledge of guardianship and conservatorship law and process; knowledge of court management practices; ability to organize and work with community groups, caregivers and others; Understand the dynamics of the needs and protection of incapacitated persons.

Knowledge of community services available to incapacitated persons.

Demonstrated skill serving as a volunteer, preferably in the area of service to the elderly, children or vulnerable adults.

Ability to interview fiduciaries, respondents, protected persons, and their family and friends, care providers, clergy, colleagues, others.

Ability to perform complex duties requiring the exercise of independent judgment.

Ability to establish and maintain effective working relationships with judges, court staff, representatives of public and private agencies, and the public.

Ability to communicate effectively, verbally and in writing, including ability to compose letters, memos and reports; ability to follow oral and written instructions.

Knowledge of business English and arithmetic, spelling, vocabulary and grammar, filing, and considerable knowledge of office methods and techniques; working knowledge of bookkeeping and budget tracking.

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No special physical demands are required to perform the work. Typically, the employee may sit comfortably to perform the work. However, there may be some walking; standing; bending; carrying of light items such as papers, books, small parts; driving an automobile, etc.

There are the risks found in the typical office setting, which is adequately lighted, heated and ventilated, e.g., safe use of office equipment, avoiding trips and falls, observing fire regulations, etc.

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