

Agenda

Court Visitor Steering Committee

September 27, 2011
12:00 to 2:00 p.m.

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

Role of volunteers		Tim Shea
Role of community partners		Karolina Abuzyarova
Operation of the program	Tab 1	Tim Shea
Proposed program timeline and priorities	Tab 2	Karolina Abuzyarova
Evaluation criteria and procedures	Tab 3	Tim Shea

Committee Web Page: <http://www.utcourts.gov/committees/visitor/>

Meeting Schedule: 12:00 to 2:00 in the Judicial Council Room, Matheson Courthouse, unless otherwise noted.

October 25, 2011
November 22, 2011
January 24, 2012
February 28, 2012
March 27, 2012
April 24, 2012
May 22, 2012
June 26, 2012
September 25, 2012
October 23, 2012
November 27, 2012

Tab 1

Operation of the Court Visitor Volunteer Program

- (1) Judge or clerk or party or lawyer for party will identify the need for a court visitor and the services and tasks to be accomplished.
- (2) Judge will decide whether to appoint a visitor.
- (3) Judge or judge's clerk contacts Court Visitor Volunteer Coordinator, Karolina Abuzyarova, and communicates the need for services and tasks expected to be performed, e.g. whether the respondent received the notice, whether respondent should be excused from the hearing, nature of respondent's incapacity and needs, review annual report, etc.
- (4) Coordinator keeps the roster of court visitor volunteers with marked skills and finds a proper match between the volunteers and the identified task.
- (5) Coordinator contacts volunteer and notifies her/him of the assignment. Volunteer checks for any conflicts and ability to timely complete the assignment. Volunteer accepts or denies the assignment.
- (6) Coordinator prepares an appointment order for the judge to sign. (Include name of volunteer, any specific services or tasks and deadline for filing a report.)
- (7) Court visitor volunteer files the report within the deadline with the court. Copies to all parties.
- (8) Court visitor volunteer submits a separate online report summarizing the assignment (for program evaluation).

Tab 2

Court Visitor Program

The Mission of the Court Visitor is to observe the circumstances of respondents and protected persons and to report to the Court

Time frame	Task	Status
May-Aug 2011	Define coordinators' duties	Done. Modify w/ experience.
	Define volunteers' duties	Done. Modify w/ experience.
	Hire coordinator	September 6, 2011
	Select district(s) for operations	Third & Seventh Cases selected randomly. Judge can assign in any case. Lawyers and clerks can recommend in any case.
	Provide work space, equipment and supplies For coordinators For volunteers	Not much needed for the volunteers
	Identify current (active) cases Cases w/o report would be a red flag	Status of court records has been updated three years ago, they are in OK condition. Revision might be necessary as the project moves forward.
	Develop operating procedures Need for volunteer Selecting a volunteer Investigation by volunteer Accessing court records Scheduling interviews Report by volunteer	Drafted. Get Committee's feedback on 9.27.2011 and modify.

Time frame	Task	Status
Oct-Nov-Dec 2011	Identify, contact and establish relations with partners in developing the program (sources of volunteers, trainings, community services for the incapacitated)	AAA (Legacy Corp, RSVP, Senior Companion) SE Utah Assn of Local Governments (Maughan Guymon), Active Reentry (Nancy Bentley) Multi-Cultural Center(Moab), Bennion Center UU, Rotary, Chamber of Commerce, American Express (Other Corporations), CPA Assn, Professional Guardians, National Association of Social Workers, UU Gerentolgy, National Alliance on Mental Illness, Catholic Community Services, LDS Social Services, VA Administration
	Develop volunteer recruitment and appointment process Advertize Application form Reference check Background check Interview Conditions Volunteer files and database Name and identifying information Contact information Work email Required training completed Highest and best use Current assignment Previous assignments Evaluations	Fingerprint background check after a local check (Sheriff's Office to do fingerprints) Car insurance; 3 letters of recommendation, complaints against a professional license.

Time frame	Task	Status
<p>Oct-Nov-Dec 2011</p>	<p>Program Evaluation</p> <ul style="list-style-type: none"> Develop measures of program and data collection procedures <ul style="list-style-type: none"> Number of volunteers Number of volunteer hours Number of interviews Number of annual reports reviewed Develop measures of success and data collection procedures <ul style="list-style-type: none"> Change in number of reporting errors Number of guardians trained Number of guardians assisted Number of problems solved Number of service referrals Calculate money spent and money saved Number of estates not dissipated Medical costs from persons not well- cared for Develop volunteer evaluation model 	
<p>Continuous process, Thursday meetings at the Law Library</p>	<p>Develop information and forms</p> <ul style="list-style-type: none"> For public For guardians For courts <ul style="list-style-type: none"> Nature of need from court to coordinator. Recommendation from coordinator to court Assignment order for judge to sign For volunteers <ul style="list-style-type: none"> Conflict of interest checklist 	<p>Pre-appointment report from visitor to court and parties. Post appointment reports to court only. Court initiates a hearing if needed or upon objection; reports to court and parties. Parties would include objecting person. Interview guardian first in normal circumstances. Guardian told initially that some visits announced; some not.</p>

Time frame	Task	Status
<p>January-Feb 2012</p>	<p>Develop volunteer training (initial and continuing)</p> <p>Basic</p> <ul style="list-style-type: none"> Volunteer expectations and procedures Guardianship law and procedures Protected person's rights and responsibilities Guardian's rights and responsibilities Confidentiality/Ethics Limits on volunteer's discretion Role as observer and reporter, not advocate <p>Advanced—auditing financial reports</p> <ul style="list-style-type: none"> Review court records Review guardian's records Common errors Response to serious problem Response to modest problem Outcome reports <p>Advanced—interviewing</p> <ul style="list-style-type: none"> Volunteer's personal safety Review court records Interview sources Interview objectives Interview techniques Safe living standards Community services Response to emergency Response to serious problem Response to modest problem Outcome reports 	<p>Work with partners on developing trainings, putting together resources available for incapacitated</p> <p>Margy and other professional guardians as visitor trainers, Jewish Family Service, OPG</p>
	<p>Develop volunteer supervision model</p>	

Time frame	Task	Status
Feb-Mar 2012	Recruit volunteers	
	Public announcements, public relations campaign	
	Interview and screen volunteers to determine whether there is a good match between volunteers and program	
	Ensure there are enough cases for the volunteers to start working	
	Develop complaint process By volunteers Against volunteers	Coordinator/Me
	Develop training for court clerks and judges	
	Develop class for guardians; for protected person's family	
April-May 2012	Train volunteers	
	Train/inform clerks and judges on the procedures of the program	
	Develop volunteer and partners recognition model	Annual recognition dinner, PJ/judges for districts, swearing in ceremony, certificates/letters, small gifts, conference,
	Make arrangements for volunteers to begin assignments	
	Supervise volunteers	
	Continuously gather evaluation data	
Fall 2012	Analyze first evaluation data, what the program has accomplished, incorporate feedback from volunteers and court staff to improve the program	
	Offer quarterly or monthly meetings for volunteers to discuss their cases and ask questions	
	Report accomplishments to the court staff, community, funders	
	Host recognition event for volunteers and partners	

Tab 3

Court Visitor Program evaluation criteria and procedures

Measurement	Method
About the volunteers	
Number of volunteers joining/departing during year: retention rate	Review volunteer database
Satisfaction	Online survey
Performance	"360" review
Time contributed	Online reports: trainer's version; visitor's version; auditor's version
About the (volunteer/guardian/public) training	
Number of courses, teachers and students	Online reports; class registration records
Topics	Online reports
Course quality	Evaluation form
About the program	
Number of visitors appointed	Online reports (separate from case report) or uniform appointment entry in CORIS
Number of case reports filed	Online report
Nature of investigation: interviews, residential visits, annual reports reviewed etc.	Online reports
Number of guardians assisted and nature of assistance	Online reports
Number of service referrals and nature of referral	Online reports
Number and nature of problems identified and nature of corrective action	Online reports
Number of APS referrals and nature of referral	Online reports
Judge/staff/lawyer satisfaction	Online survey
Nature of marketing	Narrative
Calculate money spent on pilot program and money saved	Compare SJI grant and matching funds with estimated value of volunteers' time (from online reports).
About guardianships generally	
Number of new and active cases	CORIS
Number of annual reports timely filed and ultimately filed	CORIS