

# Agenda

## Working Interdisciplinary Network of Guardianship Stakeholders

November 20, 2013  
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

Welcome and Approval of Minutes	Tab 1	Tim Shea
Summit Follow Up and Recommendations: <ul style="list-style-type: none"><li>• Agency Cooperation</li><li>• Medical Evidence of Incapacity</li><li>• Person Centered Planning and Supported Decision Making</li></ul>	Tab 2	Tim Shea Rob Denton Mary Jane Ciccarello
2014 Meeting Schedule		

Committee webpage: <http://www.utcourts.gov/howto/family/GC/wings/>

Meeting Schedule 12:00 to 2:00 at the Matheson Courthouse

January 15, 2014

March 19, 2014

May 21, 2014

# Tab 1

## **Working Interdisciplinary Network of Guardianship Stakeholders**

### **September 18, 2013 summary minutes**

The corrected minutes from August 21, 2013 meeting were approved.

The summit agenda was approved and the following edits were suggested:

- A description of each break out session will be added.
- The name of the agency collective impact group was changed to “agency cooperation.”

The list of participants was modified: Cherie Bruncker and Corey Fairholm moved from the medical evidence group to the person-centered planning group; Clara McLane moved from the medical evidence of incapacity group to the agency cooperation group. Dr. Thatcher and a representative of Medicaid were added to the group.

Sally Hurme and Erica Wood emphasized that the key to success of the summit is to identify specific action steps and actors to perform these steps. The Committee decided to limit topics for each breakout group to four with four recommendations for each topic that will define action steps. The groups will vote on the issues by using the voting dots.

Each breakout session will have a facilitator, recorder and a reporter. Reporters will provide an update to the whole group during lunch hour and will summarize each group’s discussions in the end of the day.

On October 1, 2013 workgroup chairs will conduct training of the facilitators. The Committee will not meet in October, but will have a follow up meeting after the summit on November 20, 2013.

# Tab 2

## Utah Guardianship Summit—Workgroup Recommendations

---

Group: Agency Cooperation  
Facilitator: Amanda Singer  
Recorder: Tim Shea  
Reporter: Alan Ormsby

### Participants:

Alan Ormsby	Doug Thomas
Amanda Singer	Joshua Brown
Anamarie Rodabough	Laura Owen-Keirstead
Angela Pinna	Michelle Ross
Anne Peterson	Mickie Douglas
Blake Nakamura	Nan Mendenhall
Carrie Schonlaw	Nels Holmgren
Clara McLane	Raylene Gomez
Daniel Musto	Tim Shea
Donna Russell	

## **Issues Examined**

---

### **First Issue**

Misunderstanding of the role of the guardian. What guardians can and cannot do. Guardianship process and regulations are complex and lead to barriers. More education for Person; Family; Community; Services.

---

### **Second Issue**

Cost of getting a guardianship. Cost of services. Need for more resources.

---

### **Third Issue**

Fragmentation of efforts. Complex process and system.

---

### **Fourth Issue**

---

## Recommendations

---

### First Recommendation

Inventory and coordinate webpage information to explain the procedures to get a guardianship, authority and limitations of guardians; alternatives to guardianship.

---

- 

---

- 

---

- 

---

- 

---

### Second Recommendation

Replicate Aging and Disability Resource Center model for Navigator (no wrong door) within the provider organizations and other agencies.

---

- Whole spectrum; advanced healthcare directive; guardianship; civil commitment. Decision trees to help Navigators chart a course.
- 

- Options counselor that understand the systems. Help people access needed services.
- 

- Culturally accessible for the client.
- 

- 

---

### Third Recommendation

WINGS should serve as the nucleus to start and oversee the effort.

---

- 

---

- 

---

- 

---

- 

---

### Fourth Recommendation

- 

---

- 

---

- 

---

- 

---

## Utah Guardianship Summit—Workgroup Recommendations

---

Group: Medical Evidence of Incapacity  
Facilitator: Lori Giovannoni  
Recorder: Karolina Abuzyarova  
Reporter: Kent Alderman

### Participants:

---

Bill Heder	Kimberley Price
David Connors	Lori Giovannoni
Frederick Gottlieb	Martin Freimer
Jackie Rendo	Norman Foster
Karolina Abuzyarova	Robert Denton
Kate Toomey	Robert Snarr
Katy O'Banion	Ron Bruno
Kent Alderman	Sally Hurme
Kevin Duff	Warren Walker

## Issues Examined

---

### First Issue

What is the minimum information necessary to support a judicial determination of incapacity?

---

### Second Issue

How will the medical professionals be compensated for the evaluations?

---

### Third Issue

Define duties of the attorney for the petitioner and attorney for the protected person in relation to the presentation of the evidence on incapacity.

---

### Fourth Issue

What is the appropriate process through first identification of incapacity to adjudication?

---

## Recommendations

---

### First Recommendation

- 
- Input from medical/psychological/social/functional/criminal justice
- 

- 

---

- 

---

- 

---

### Second Recommendation

- 
- Template for medical information that's needed
- 

- Involve representatives from Medicaid, private payers, and facility billing departments.
- 

- 

---

- 

---

### Third Recommendation

- 
- Identify existing resources that define the role of the attorneys
- 

- Training and CLE's for attorneys who will agree to represent proposed incapacitated persons
- 

- 

---

- 

---

### Fourth Recommendation

- 
- Identify the times/places when someone would be identified as incapacitated
- 

- Identify the resources that are already in place
- 

- Identify the agencies involved
- 

- Situations that could lead to emergent petition for guardianship. Definition of emergency.
-

## Utah Guardianship Summit—Workgroup Recommendations

---

Group:	Person Centered Planning and Supported Decision Making
Facilitator:	Manuel Romero
Recorder:	Mary Jane Ciccarello
Reporter:	Maureen Henry

### Participants:

---

Becky Allred	Manuel Romero
Carleen Kurip	Margy Campbell
Charise Jensen	Mary Jane Ciccarello
Charron Rumble	Maureen Henry
Cherie Bruncker	Mona Tausinga
Corey Fairholm	Norma Matheson
Dorothy Henderson	Shannon Alvey
Holly Kees	Teri Fuller
John Cowan	Tom Quam
Julie Rigby	Wendy Fayles
Liane Frederick	

## Issues Examined

---

### First Issue:

**Accessing information about decision making, alternatives to guardianship, guardianship, and appropriate services and resources by all stakeholders**

---

## Recommendations

---

### First Recommendation

- Quarterly roundtables for all stakeholders (service providers, professionals, family members, and protected people) to share information and develop further methods of education and dissemination of information
-

## **Second Recommendation**

- 
- Using available technologies to broadcast the roundtables and facilitate statewide participation
- 

## **Third Recommendation**

- 
- Roundtable efforts will be coordinated by WINGS
-