

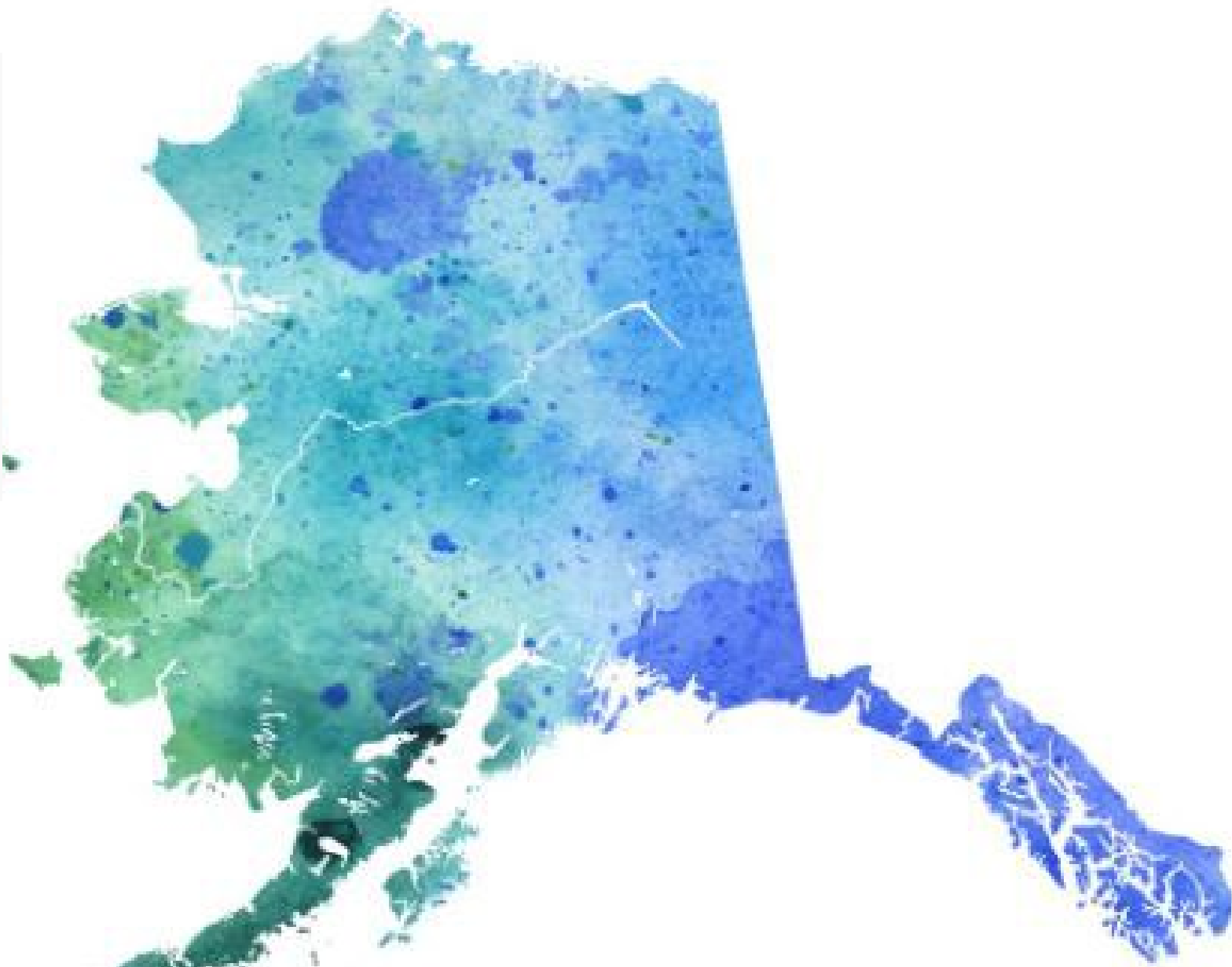


**Mentoring & Monitoring;
A New Approach to Adult
Guardianship & Conservatorship**

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It's been a
long time
coming

- Travel across the state
- Surveys
- Meetings
- Interviews
- Data collection from reports
- Research



Objectives & Outcomes of ACL Guardianship Improvement Grant

■ **Increasing Proficiency**

- Increase proficiency of the court and all participants in the guardianship process
- Consistent and timely practices among the courts with the implementation of statewide protocols that ensure the integrity of the process

■ **Improve Monitoring**

- Improve monitoring, especially regarding financial issues and identifying less restrictive options
- Increased monitoring using newly developed review tools and methods of discovering concerns

■ **Provide Assistance**

- Provide customer service with equal access statewide, including persons subject to guardianship as well as diverse and underserved populations about guardianship processes such as options, petitioning, and the appointment process, responsibilities once appointed and changes including restoration of rights.
- Increased awareness of guardianship options, procedures for key stakeholders including all of Alaska's diverse populations

Guardianship Monitors



- **Mentoring support with new appointments**
- **Ensuring filing of filing required documents**
 - **Sending reminder notices, follow up by phone or email**
- **Reviewing filed reports**
- **Consultation with appointees if questions on review of documents**
- **Facilitating Guardianship Helpline**
- **Providing monthly classes**
- **Special Project Monitor to assist in review of public guardian cases**
- **Administrative Order**
<https://courts.alaska.gov/jord/index.htm#statewide>

New Appointments



- **Within 30 to 45 days of distribution of orders, monitors will...**
 - **Review file/order for administrative items and monitoring notes**
 - **Introductory phone call for family, volunteer type appointments or brand new private, professional guardians (serving less than a year).**
 - **Introductory new case letter with reminders and notifications of resources**
 - **Review of implementation report in comparison with order, log notes, petition and court visitor report.**

Monitors will follow the case through the filing of all initially required items and ensure compliance. If not filed, case will be referred back to the judge for follow up no later than 6 months from appointment.

Compliance and Review



- **Sending reminder notices for annual reports and follow up to ensure filing.**
 - **Process includes initial reminder letter, second reminder notice and third reminder notice but with an attached compliance conference rather than a hearing**
 - **During the mailed reminders, monitors will also call and/or email to try and make contact**
 - **Access to public database Accurint for items like returned mail**
 - **Based on circumstances, appoint a court visitor to investigate or set status hearing**
- **Review of annual reports with comparison to order, implementation/previous annual reports, visitors reports.**
 - **Can approve or approve with education or send a deficiency notice for more information**
- **Consultations with appointees as requested**

Community Training and Support



- **Monthly Classes**
 - **Fundamentals on 1st and 3rd Tuesday**
 - **Tracking Information and Annual Report 2nd Tuesday**
 - **Understanding Basics of Public Benefits 4th Tuesday**
 - **Alternatives to Guardianship 5th Tuesday (quarterly)**
- **Guardianship Helpline phone and email**
- **Partnership with ASAGA for items like Income and Expense Tracker and Annual Report reminders via email**

Special Project Monitor



- **Will review public guardian cases when identified as a potential case for reduction or dismissal of authority but also if there is an identified alternative appointment**
- **Three years through FY2027**
- **Data Collection for future trainings on restoration of rights and/or needed services**

Guardianship Compliance Officer Role

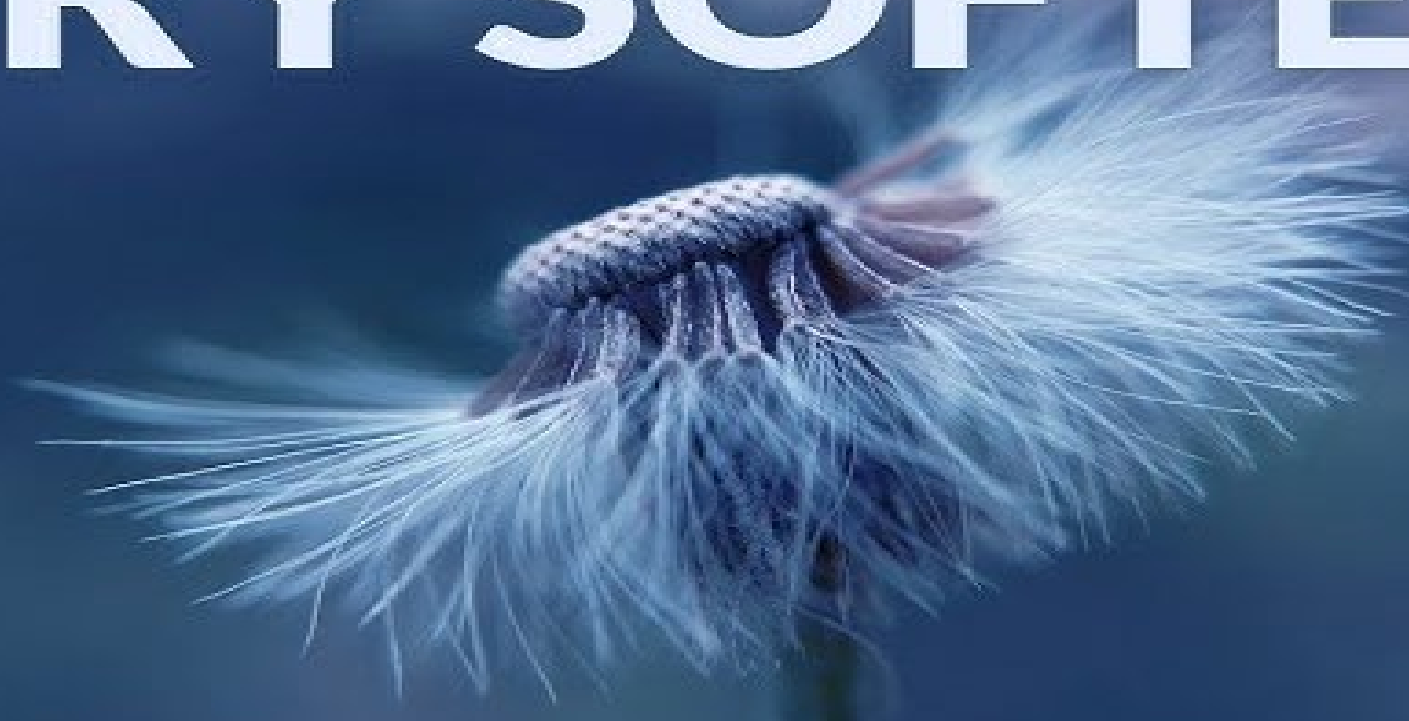


- **Oversee the Guardianship Improvement Project for ACS**
 - Phase One of a statewide monitoring program over next year
 - Continue to facilitate WINGS
- **Oversee the Court Visitors**
- **Oversee the Guardianship Monitors**
- **Provide support for judicial officers and court staff**
 - Order required three year reviews
 - Review files for transfer in/out of Alaska to ensure necessary documents are filed
 - Approve, deny or consult on administrative requests like room and board, paid caregiver, etc
 - Quarterly memo to all judicial officers and clerk of courts on adult guardianship issues to increase awareness
 - Oversee pilot for the Guardianship Complaint Process

A Softer Approach



TRY SOFTER





Information From Pilots



- **Increase in approved reports versus deficient reports**
- **Increase in timely filings**

- **Contact with appointees with questions**
 - **Guardianship Helpline**
 - **Open since April 2022**
 - **Over 3600 calls/emails to date**
 - **Petitioning or petition for reviews, annual reports, understanding orders top calls**
 - **Can provide legal information; not legal advice**
 - **Over 95% satisfaction rating**

Other areas of Improvement



- **Increased Court Visitor travel budget to see in-person as many cases as possible**
- **Data collection to begin**
- **Regular communication on guardianship issues with jurisdictions**
- **Continued training for judges and court visitors on relevant topics**
- **Creation of new forms for those who are unrepresented.**
- **Upcoming over next 12 months...**
 - **Guardianship Complaint Pilot**
 - **Website Development**
 - **Bench Cards for judges**
- **Phase 2 of improvement will look at possibility of tiered monitoring**

Overall Goals of Program



- **Specialized department with sole focus on this case type**
 - **Timely responses, timely reminders, dedicated training**
- **Open judicial officer calendar space and time for important concerns**
- **Better support for family/friend/volunteer retention**
- **Better trained workforce with ongoing oversight and educational opportunity (judges, clerks, monitors, visitors)**
- **Reduction in full appointments, better understanding of alternatives**