



## **Presentation to NMGA**

**Friday, 11/20/20**

### **MISSION**

**-Guardian Partners** was founded in 2013 to prevent abuse of elders, people with disabilities and children under state-appointed guardianship. Our programs were launched in 2015.

**-Mission Statement:** Protecting the dignity and safety of Oregonians under guardianship care – including seniors & adults with disabilities and minors – and supporting court-appointed fiduciaries with case monitoring, education and resources.

**-Communities served:** Developmental disability, age-related dementia, mental illness, traumatic brain injury.

**-Agency Overview:**

HQ in Portland

Serving Five counties; 48% of Oregonians

Five staff (two full-time; three part-time)

All work is at the behest of the Court

Statute and Local Rules

**-My background**

**-Board of Directors:** Nine

2 attorneys

2 bankers

2 accountants

1 doctor (gerontologist)

1 judge

1 nonprofit fundraiser

### **MONITORING**

**-We train volunteer Monitors to visit with Protected People and conduct a wellness interview, looking for signs of abuse or exploitation, and making sure they are being well cared for by their Guardians.**

**-Process begins and ends with Court.**

**-Combination of randomly-assigned cases and cases which cause concern for Judge.**

**-Steps of monitoring a case.**

**-Adjustments for virtual monitoring during Covid pandemic.**

**-Cases often take 8 – 10 hours, can take longer.**

**-25 current volunteer monitors; still rebuilding post-Covid.**

**-Largely from law or social work.**

**-Monitor 100 cases per year, 80-90% in Portland Metro area.**

**-Training**

1 hour with ED

2 hrs with Monitoring Coordinator

3 hrs classroom (Guardians of Adults and Conservator classes)

6 – 12 hours shadowing

## **EDUCATION**

We offer classes and other resources to educate newly-appointed *non-professional* Guardians and other fiduciaries on their legal and ethical responsibilities.

-Classes are Court-mandated in counties we serve.

-Classes:

- Guardianship of Adults (\$100 fee)
- Conservator of Adults (\$150 fee)
- Guardianship of Minors (no cost)
- Trustee (\$150 fee)
- Personal Representative (aka Executor) (\$150 fee)

-2,500 class participants each year.

-Classes historically have been offered primarily in-person, with an online film available, but discouraged. Pivot to all online since Covid shutdown.

-Over 90% of Guardians reported learning more about how to protect a person with disability from abuse.

-Over 85% of Guardians report learning more about making decisions which reflect the Protected Person's values and best interests.

-60% of education attendees are Personal Representatives.

-30% of Guardians & Conservators do class online; 40% of PR

-Curricula maintained by Education Consultant with a team of attorney volunteers.

-Two co-fiduciaries on any case may attend for one fee.

-Fees are waived for anyone who has had their Court fees waived.

-Attendees are welcome to revisit a filmed version of the class free-of-charge, upon request.

-Guardian Partners arranges and pays for language interpretation as needed.

## **FUNDING**

-\$389,000 annual budget (2019)

63% from class fees

15% public funding

14% events (Partners Party)

5% private grants

## **CHALLENGES**

-Young org; low awareness/visibility.

-Struggle to collect data, especially demographic data; little control over who we Monitor.

-Language interpretation – Needed 2 or 3 times a month, \$250+ per class to interpret.

-Expansion – Urban vs. rural attitudes; perceived threat to legal community.

-Lack of internet access in poor, rural areas.

## **SUCCESSSES**

-One in four cases monitored benefits from some support or intervention.

-Organic growth from county to county as Judges speak to each other.

-Judges tell me how they really rely on Monitor reports and base decisions upon them.

-“Happy Ending” cases where Protected Person has rights restored.

## **LOOKING AHEAD**

- About to monitor first case in Tillamook County (much smaller, rural).
- Better access for people not prolific in English language.
- Better ADA access in office and classroom for people using wheelchairs (project pending).
- Recreating recorded online classes with: better production quality; interactive modules; closed captions; Spanish language versions.
- Exploring live webinars.
- Diversity initiative for Monitor program.

### **MAYBE ONE DAY**

- Monitor Guardians of Minors
- Monitor Conservatorships
- Ongoing support groups for Guardians