



Alaska WINGS

Vision – the Dream

Design an effective system of processes that maximizes the support of vulnerable adults in Alaska.

Mission – The What and Why

To ensure a functional and responsive adult guardianship system that maximizes self-determination, avoids unnecessary guardianships using less restrictive alternatives and prevents and addresses abuse through monitoring and education.

March 20, 2018 Meeting Minutes

9am to 12 pm

In attendance: Beth Goldstein, Lizette Stiehr, Teresa Holt, Danielle Cutter, Kathryn Chung, Kelda Barstad, Sandra Jenkins, Diane Brewer, Dave Fleurant, Stacey Marz, Michelle Viriden, Jake Carbaugh, Lauren Anderson

- I. Welcome Commission on Law and Aging
Presentation: National Birds Eye View: Guardianship Reform
If you are interested in getting a copy of the presentation that was provided, please contact Lisa at lwawrzonek@akcourts.us
- II. Housekeeping and Announcements:
 - a. Welcome to Sandra Jenkins, Manager at APS; Judge Daniel Schally and Diane Brewer with the AG's office who are new members of WINGS.
 - b. A day after the meeting, a report from the National Council on Disability called *Beyond Guardianship. Toward Alternatives That Promote Greater Self-Determination for People with Disabilities*. If you are interested in seeing a copy of this report you can do so at - (<https://ncd.gov/publications/2018/beyond-guardianship-toward-alternatives>)
- III. Committee Updates and Announcements:
 - a. **Monitoring from Dave F**
 - i. The committee is looking at a new annual report form that makes the narrative more simple yet captures information necessary for the Court to

monitor the existing order as it is meant to do. There is also the possibility of separate reports – one for non-professionals and one for professional guardians.

- ii. Discussion of 12 months of bank statements instead of just one.
- iii. Georgetown Iron Tech lawyers are working on an easy app for taking pictures of receipts and expenditures, categorizing them and it'll provide a report for documentation that will assist guardians in keeping track of expenditures. They are also working on an online, guided interview program for the annual report. The hope is to have something to test out in late April.
- iv. Discussion about review of annual reports
- v. Erica indicated that there are other states that have third party reviewers (NY, Virginia) and MN has a software that detects red flags before their auditors review them.
- vi. Need for more education up front on what guardians can and cannot do
- vii. Value in court ensuring compliance with items that can help with monitoring like the Implementation Report, reviewing reports and education
- viii. Discussion of training for community monitoring such as care coordinators or assisted living homes
- ix. Discussion at the three-year mark of having more of a financial audit for larger estates

b. Alternatives – Dave F reporting for Anne Applegate who was in Juneau

- i. Hope Community Resources continues to work on the pilot project looking for potential individuals
- ii. The SDMA bill has two sponsors and they are tweaking language on the bill
- iii. Two other states recently passed legislation on SDMA (TN, WI)
- iv. Discussion of having SDMA training in the school districts once an available alternative

c. Court Improvement from Stacey M

- i. The court is forming a committee to look at various issues and whether or not new probate rules are necessary.
- ii. Administration staff are working with court clerks to have everything docketed within 24 hours and distribution of any order out in 5 days after receipt.
- iii. The Anchorage court is going to work on an auto distribution of reminders for the Implementation Report and this report is being added to the pilot project for review.
- iv. Court Visitors and the Court are working on a partnership with BSW and MSW students to help with monitoring under supervision; specifically starting with three-year reviews. We hope to have two students in the fall for a one-year pilot in Anchorage.

- v. A number of forms are being worked on for updating. The timeline for the updates should be June or July 2018.
- vi. The online education course that has been developed over the last year should be available in June of 2018. It is three parts – what to think about before petitioning, how to petition and the guardians responsibilities. Translation of this video will be the second phase of the project and for those communities that do not have good internet, it will be available on a thumb drive in an interactive format.

d. Education from Lisa W

- i. The education committee has made the recommendation that WINGS supports Alaska having an entity that is a clearinghouse for both information and education on adult guardianship.
- ii. ASAGA has been funded for a 2nd year from the ABE Opportunity grant

Announcements:

Next meeting will be **June 19th** from 9am to 12 pm at the Snowden Training Center
Meeting concluded at 12pm.