



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.

September 15, 2020 Meeting Minutes 9am to 11am

Attendance: Lisa Wawrzonek, Coordinator
Teresa Holt, AARP
Dave Fleurant, DLC
Anne Applegate, Governor’s Council on Disabilities/Special Education
Stacey Marz, ACS
Lizette Stiehr, AADD
Nekeysha Taylor, DOC
Lauren Anderson, Providence
Tammy Hunter, APS
Beth Russo, Office of Public Advocacy
Beth Goldstein, Office of Public Advocacy
Patrice Icardi, Attorney

Invited Guest: Stacy Steinberg, ACS

- I. **Welcome.** This meeting was conducted via Zoom due to the Covid-19 pandemic. The April 2020 meeting was cancelled due to Covid and the last meeting was in September 2019 when we invited SSA, DPA and the VA to discuss informally concerns. A Doodle poll went out to set a date for the January 2021 meeting.

II. Update on the Probate Rules Committee – Stacy Steinberg

- a. See attached Summary provided by Ms. Steinberg, the Rules attorney, on the Probate Rules that are being proposed to the Supreme Court.
- b. Purpose of the committee was to look at procedural format – what are the rules and to ensure efficiency
- c. Formed in December 2018 by Chief Justice Bolger as a special committee chaired by Superior Court Judge Daniel Schally
- d. Committee identified rules changes but also areas where changes need to be in statute and those were passed onto the Statute Committee
- e. Ms. Steinberg provided an overview of the proposed changes – see attached summary
- f. Upcoming timeline includes:
 - i. Rules were presented to the Supreme Court
 - ii. Will now be prepared for public comment
 - iii. Once public comment is finished, it will be sent back to the committee
 - iv. Follow up presentation to the Supreme Court
 - v. Hopeful to have accomplished new rules by the time the new rules book is published in April 2021
- g. Supreme Court is very receptive to rules changes
- h. Probate Rules Special Committee is now permanent so that changes can go between statute committee and rules committee as needed

III. Statute Committee – Dave Fleurant and Teresa Holt

- a. Looking for the side by side for the new uniform act (UGCOPPA).
- b. Formed three sub committees – Guardianship, Conservatorship and Other Protective Arrangements
- c. Other protective arrangements disbanded as it is similar to our single transaction which is in law already but broader
- d. Conservatorship committee is waiting on the side by side. Chaired by Beth Russo
- e. Guardianship committee is chaired by Lizette. This committee is looking at a few items such as talking with other states, what is the administrative burden of adopting the law etc.
- f. Meeting monthly

IV. Alternatives – Anne Applegate

- a. Has not met since January but planning to meet soon
- b. 17 in total agreements to date
- c. SDMA Symposium in the works for November 2020
- d. Trainings have been conducted with the Anchorage School District, ARC of Anchorage staff, Train the Trainers and working on a slide deck for Court staff which will go up on the website.
- e. Also coming soon is a PSA with AARP for SDMA and seniors
- f. On hold is the Demonstration Project and Assistive Technology which needs to be face to face.

- g. Working on guide for IEP teams
- h. Will work with permission from the Court to gather sample data from petitions involving seniors

V. Court Improvement – Stacey Marz

- a. Has not met as much of what the improvement suggestions were discussed in the rules committee
- b. Mentioned Lisa Wawrzonek's new role as the Statewide Guardianship Compliance Officer

VI. Education - Dave Fleurant

- a. Dave had to leave for another issue so Lisa W who is also on the committee and the administrator for ASAGA gave an ASAGA update.
- b. The education committee has not met.
- c. ASAGA continues two monthly webinars on the Fundamentals of Guardianship as well as reporting to the court. Various other webinars have been done and recorded and put up on the website.
- d. Holding annual conference via Zoom this year on 10/2 and 10/3 on the Making, Management and Monitoring of the Money.
- e. Annual report for FY20 is out on website and we have funding through FY21 and FY22. Will be looking at options beyond that.
- f. Given the referrals and the contacts, it is clear that a guardianship assistance program for the community is necessary.

VII. Monitoring Committee – Lisa Wawrzonek

- a. Monitoring committee has not met largely as much of what is on our list also is involved with the probate rules.
- b. Did email the committee with a few things happening at the Court level.
 - i. The monitoring system we've been doing in Anchorage is now being prepped to go statewide so that the court system can have good statewide data on approvals, deficiencies, judicial reviews etc
 - ii. A new annual report has been drafted and sent out for comment in various areas and should become available in early 2021. This will also include a checklist (guide) for reviews
 - iii. There are other monitoring tools that Lisa would like the committee to look at and help determine the next steps in monitoring for the ACS such as the risk assessment from the State of Idaho and a web based tracking method. Court also considering a compliant form similar to Idaho.

VIII. New Business

- a. Lisa W asked the committee if it was time to start looking at other alternatives for appointments other than private professionals which we do not have enough of and OPA which is overloaded as well. Some states have a volunteer program.
- b. Committee asked if someone could speak at the next meeting on how this works and Lisa will invite a couple of individuals who work in these programs.

- c. Discussion on pooled POA programs, medical care navigators (California) bill payer programs (WA) and similar programs like payees as well.

**Doodle Poll was sent out and majority can do January 26, 2021
from 9am to 11am**