

Utah WINGS Report
National Guardianship Network
April 10, 2014

Name: State the name of your WINGS group.

Utah Working Interdisciplinary Network of Guardianship Stakeholders.

Mission: Describe the overall mission of your state WINGS group.

Utah WINGS is an ongoing problem solving body that relies on court-community partnerships to oversee guardianship practice, address key policy issues, assess and improve the current system of vulnerable adult guardianship and less restrictive alternatives, engage in outreach, education and training, and enhance the quality of care and quality of life of vulnerable adults.

Steering Committee: List the stakeholder entities represented in your Steering Committee. Describe the role of the steering committee.

WINGS Steering Committee meets bimonthly to work on planning, coordination and problem solving in the area of guardianship reform. The committee prioritized focus areas for the Utah Guardianship Summit that took place in November 2013, identified summit participants, and directed the structure of the event. The committee followed up on the results of the summit: produced three articles for publication in the *Utah Bar Journal*, formed a workgroup on curriculum development, and directed creation of the listserv and Facebook page.

Carleen	Kurip	Elder Advocate	Ute Tribe
Daniel	Brewster	Sergeant	Salt Lake Police Department
Daniel	Musto	Director	Utah Long-Term Care Ombudsman
David	Connors	Judge	Second District Court
Donna	Russell	Director	Utah Office of Public Guardian
Ellen	Silver	Executive Director	Jewish Family Service
Gonzalo	Palza	CEO and Head Start Director	Centro de la Familia de Utah
Holly	Kees	Volunteer Coordinator	Court Visitor Volunteer Program
Jennifer	Morgan	Program Manager	Utah Aging and Disability Resource Connection
Julie	Rigby	Judicial Team Manager	Third District Court
Karolina	Abuzyarova	Program Coordinator	Court Visitor Volunteer Program
Kent	Alderman	Attorney at Law	Lewis Hansen, LLC
Mary Jane	Ciccarello	Director	Self-Help Center, Utah State Courts
Mona	Tausinga	Outreach Coordinator	Disability Law Center
Nan	Mendenhall	Director	Utah Adult Protective Services

Nels	Holmgren	Director	Utah Division of Aging and Adult Services
Norman	Foster	Director	Center for Alzheimer's Care, Imaging and Research, University of Utah
Robert	Denton	Managing Attorney	Disability Law Center
Tim	Shea	Appellate Court Administrator	Utah Supreme Court
Wendy	Fayles	Criminal Justice Mentor	Utah NAMI

Since the initial formation of the WINGS Steering Committee three members have left. Margy Campbell, Executive Director of the Guardian and Conservator Services, LLC, has been involved with the court's guardianship efforts since 2011 and played a key role in forming WINGS and planning the summit. Jackie Rendo of Utah NAMI, has been part of the WINGS group since the first meeting in April 2013, but has been replaced by Wendy Fayles from the same organization starting January 2014. Manuel Romero from the Department of Human Services played a key role as a facilitator of the panel of caregivers at the Utah Guardianship Summit, but has left the Committee in 2014 due to reorganization in his agency. These individuals were essential in helping start the WINGS initiative.

New members of the Committee are: Carleen Kurip, Elder Advocate from the Ute Tribe, and Gonzalo Palza, CEO and Head Start Director at the Centro de la Familia, a non-profit organization that serves Latino community in the state of Utah. Director of the Aging and Disability Resource Connection, Jennifer Morgan, joined WINGS Executive Committee in February 2014.

Priority Setting: Describe the process used to gather information about priority guardianship and decision-making issues in the state. Summarize the resulting priorities identified for the WINGS meetings. Attach any survey form used.

The Utah WINGS did not conduct a survey. Before the very first scheduled WINGS meeting a small planning group put together a list of topics that were prioritized by the Steering Committee at the initial meeting in April 2013. A matrix of topics was created by the following categories: constituency, planning ahead, court appointment proceedings, post-appointment issues, interaction between agencies and stakeholders. Later in the discussion at the second WINGS meeting in June 2013, three topics emerged from a further review of the matrix:

1. Agency cooperation and coordination: government agencies and private organizations necessarily focus their efforts on their core mission. Too much diversity of purpose and the organization will do nothing well. The workgroup will explore the challenges that specialization presents to their clients, how an organization's policies may contribute to

those challenges, and how organizations can work collectively to improve services to their clients.

2. Medical evidence of incapacity: the medical evidence work group will focus on the necessity for medical evidence in guardianship proceedings, and the challenges to presenting thorough, relevant, objective and timely evidence. The goal is to identify three of the greatest problems in obtaining the best evidence about the proposed wards incapacity or lack thereof, and then develop solutions and action steps that will be presented to all attendees of the summit.
3. Person centered planning and supported decision making: making decisions for another adult is challenging whether the decision maker acts informally or as a court appointed guardian. What are the various ways a decision is made? Who is involved in the decision making process? What information and support does a decision maker need? This workgroup examines best practices for educating the public and stakeholder groups about guardianship, alternatives to guardianship, person centered thinking and planning, and supported decision making.

Stakeholders: List the stakeholder entities represented in your WINGS group.

Below is a list of stakeholders that took part in the Utah Guardianship Summit on November 6, 2014, and are currently subscribed to the WINGS listserv.

Alan	Ormsby	State Director	AARP Utah
Anamarie	Rodabough	Program Director	Guardianship Associates
Angela	Pinna	Client Services Administrator	Utah Division of Services for People with Disabilities
Anne	Peterson	Executive Director	Utah Commission on Aging
Becky	Allred	Administrator	Stagg Fiduciary Services LLC
Bill	Heder	Court Visitor/Elder law attorney	Court Visitor Volunteer Program
Blake	Nakamura	Chief Deputy of Justice Division	Salt Lake County District Attorney's Office
Carleen	Kurip	Elder Advocate	Ute Tribe, Ute Family Center
Carrie	Schonlaw	Director	Five-County Area Agency on Aging
Charise	Jensen	Caregiver Support Program Coordinator	Salt Lake County Aging
Charron	Rumple	Family guardian	
Cherie	Brunker	Chief	Intermountain Healthcare, Geriatrics
Clara	McLane	Director, Counselor	Older Adults Services, Jewish Family Service

Daniel	Musto	Director	Utah Long-term Care Ombudsman
David	Connors	Judge	Second District Court
Det. Liane	Frederick	Crisis Intervention Teams Investigator	Salt Lake Police Department
Donna	Russell	Director	Utah Office of Public Guardian
Dorothy	Henderson	Family guardian	
Doug	Thomas	Director	Utah Division of Substance Abuse and Mental Health
Frederick	Gottlieb	Internist, Geriatric Specialist, Hospice & Palliative Specialist	Salt Lake Senior Clinic
Holly	Kees	Volunteer Coordinator	Court Visitor Volunteer Program
Jackie	Rendo	Criminal Justice and Family Mentor	Utah NAMI
John	Cowan	Long-Term Care Ombudsman	Long-Term Care Ombudsman, Davis County
Julie	Rigby	Judicial Team Manager	Third District Court
Karmon	Reese	President	Utah Assisted Living Association
Karolina	Abuzyarova	Program Coordinator	Court Visitor Volunteer Program
Kate	Toomey	Judge	Third District Court
Katy	O'Banion	Court Visitor/Psychologist	Court Visitor Volunteer Program
Kent	Alderman	Attorney at Law	Lewis Hansen, LLC
Kerri	McDonald	Manager	University Medical Billing
Kevin	Duff	Clinical Neuropsychologist	Center for Alzheimer's Care, Imaging and Research, University of Utah
Kimberley	Price	Medical Surgery Supervisor	VA Salt Lake City Health Care System
Laura	Owen-Keirstead	Family Services Counselor	Utah Alzheimer's Association
Manuel	Romero	Community Relations Program Manager	Utah Department of Human Services
Margy	Campbell	Director	Guardian & Conservator Services, LLC
Martin	Freimer	Consulting Geriatric Psychiatrist	Center for Alzheimer's Care, Imaging and Research, University of Utah
Mary Jane	Ciccarello	Director	Self-Help Center, Utah State Courts
Maureen	Henry	2012-13 Atlantic Philanthropies Health and Aging Policy Fellow; Attorney at Law	Ph.D. candidate in the University of Utah College of Nursing Hartford Center for Geriatric Nursing Excellence Ph.D. Geriatric Specialty Cohort
Mickie	Douglas	Public Affairs Specialist	Social Security Administration
Mona	Tausinga	Outreach Coordinator	Disability Law Center
Nan	Mendenhall	Director	Utah Adult Protective Services
Nels	Holmgren	Director	Utah Division of Aging and Adult

			Services
Norma	Matheson	Former First Lady of Utah	
Norman	Foster	Director	Center for Alzheimer's Care, Imaging and Research, University of Utah
Raylene	Gomez	Director, Care Management and Social Services	Intermountain Medical Center
Robert	Denton	Managing Attorney	Disability Law Center
Robert	Snarr	State Adult Programs Manager	Utah Division of Substance Abuse and Mental Health
Ron	Bruno	Crisis Intervention Teams Coordinator	Salt Lake Police Department
Sally	Hurme	Project Advisor	AARP, Education and Outreach
Shannon	Alvey	Program Manager	Utah Office of Public Guardian
Steve	Sabins	President Elect	Utah Assisted Living Association
Teri	Fuller	Caregiver	Smith & Glauser
Tim	Shea	Appellate Court Administrator	Utah Supreme Court
Tom	Quam	Court Visitor/Bank examiner	Court Visitor Volunteer Program
Warren	Walker	Board Member	Utah Healthcare Association
Wendy	Fayles	Family and Consumer Mentor	Utah NAMI

WINGS Meetings: Give dates of your in-person full state WINGS meetings (not smaller working groups) and attach agendas.

All Steering Committee meetings took place at the Matheson Courthouse in Salt Lake City, 450 South State Street on the following dates:

2013-04-17, 2013-06-19, 2013-08-21, 2013-09-18, 2013-11-20, 2014-01-15, 2014-03-19.

Working Groups: List the more focused working groups resulting from the full state WINGS meetings.

Person centered planning and supported decision making work group

Agency cooperation work group

Medical evidence of incapacity work group

Curriculum development work group

Objectives: List the short, medium and long-term goals of your WINGS group and/or the WINGS working groups.

Short-term goals:

- Agencies communicate on a regular basis, share information and are accessible to public;
- Thorough medical evidence of incapacity of vulnerable adults is provided by independent professionals and is presented in the court where limited guardianship is preferred;
- Information about person centered planning, supported decision making and alternatives to guardianship is available and accessible.

Medium-term goals:

- WINGS initiative and its umbrella projects are sustainable, funded either by grants or until permanent funding is secured;
- The establishment of statewide and ongoing, easily accessible in person and virtual training for the family guardians, caregivers, professionals and vulnerable adults.

Long-term goals

- Safety, dignity and respect for vulnerable adults that need help making decisions;
- Vulnerable adults have the most self-reliance and self-determination they are capable of;
- Guardians and other care givers are guided by the principles of person centered planning and supported decision making – based on the protected person’s values and preferences;
- Guardians handle the protected person’s estate properly and responsibly to match the standard of living that the protected person is used to and can afford;
- Families and professionals are prepared to navigate the world of guardianship procedures, government benefits, community services, and residential options for a vulnerable adult.

Results: (as of March 31)

Quantitative: List any specific indicators of success on which the group has agreed, and any data collected. List accomplishments of WINGS thus far (including those of individual stakeholder entities that have contributed to the overall mission). Quantify where possible (i.e., number of attendees at presentations, number of web hits, number of training sessions, number of copies distributed).

Qualitative: Write a paragraph or two describing the impact of WINGS thus far on policies and practices, connections made, perceptions changed, new initiatives underway.

Achievements

- Formation, April 2013 – 20 members.
- Statewide Summit, November 2013 – sixty participants.
- Expansion of volunteer court visitor program – volunteer roles like auditor and tracker are available to use statewide.
- Guardianship webpages and forms:
<http://www.utcourts.gov/howto/family/gc>
- Listserv, February 2014, subscribe at karolinaa@utcourts.gov.
- Executive Committee formed in February 2014.
- Community organizations representing minority groups attended WINGS meeting on March 19, 2014 and are invited to attend on a regular basis (Comunidades Unidas, Mexican Consulate, Centro de La Familia).
- Ute Tribe Elder advocate joined WINGS Steering Committee – March 2014.
- Aging and Disability Resource Connection (ADRC) that operates in 19 counties joins WINGS in February 2014
- Curriculum development workgroup formed.
- Presentation at World Congress on Guardianship, May 2014.

Pending

- Facebook page.
- YouTube channel.
- Attorney Signature Program.
- Publication of three papers from summit.
- Reference guide for guardianship resources.
- Collaboration with SSA and VA.
- Permanent representation of Latino community.

WINGS meetings and summit brought together professionals in the fields of law, social work, medicine, aging services, Veterans Administration, Social Security Administration, non-profit agencies, private guardians, healthcare associations, AARP, Alzheimer's Association and others. Connections were established between agencies that sometimes serve the same population but do not communicate with each other or provide referrals. It certainly provided an educational opportunity and widened the understanding of gaps in the area of guardianship and beyond. Participants of the panel that represented family guardians and caregivers clearly identified the need for a dialogue, face to face learning opportunities, and difficulty in breaking through the bureaucratic structures that seem not to share the information between themselves that would make the life of vulnerable adults and their caregivers and guardians easier.

A need for a statewide training accessible by all stakeholders was clearly identified. WINGS has formed a curriculum development workgroup that held its first meeting. The program coordinator is applying for grant funding that will support the training efforts.

Public Participation: Describe any approaches your WINGS group has taken toward receiving public comments on the practice of adult guardianship in the state.

We are in the process of creating a WINGS Facebook page that is accessible to the public. We will be updating it with events and training opportunities in the area of guardianship, relating to vulnerable adults, caregivers, family and professional guardians.

We invited family guardians to be a central part of the guardianship summit. They presented their perspectives at the panel discussion that gave other professionals participating in the summit a practical viewpoint of what is needed and what challenges public encounters with the current state of affairs.

WINGS initiated a listserv on guardianship topics. Those who participated in the summit have already been included. Any who would like to subscribe can do so by sending an email to karolinaa@utcourts.gov with “subscribe to wings” in the subject line or text. Some of the information sent round that you may have missed:

- University of Utah College of Social Work free Lecture Series on Aging: Music & Memory: How Many Memories Does an iPod Hold?
- 2014 World Congress on Adult Guardianship features the Utah Volunteer Court Visitor Program.
- 12th Annual Rocky Mountain Geriatrics Conference: Unlocking Doors across the Long Term Services and Support Spectrum.
- University of Utah – Center on Aging Newsletter: Katherine Supiano, PhD, LCSW, FT received funding from the Alzheimer’s Association for her studies on grief experiences of caregivers for patients who had dementia.
- The Veterans Health Administration Office of Rural Health has developed an education series designed to aid caregivers who are helping a loved one suffering from dementia, including home safety, legal matters, dealing with problem behaviors and learning relaxation techniques.

Expenditures: Without specifically itemizing the expenditures, explain how the WINGS incentive grant was used.

The majority of the funding was spent on the statewide guardianship summit that hosted 60 participants for a full day at the Radisson hotel in downtown Salt Lake City. Breakfast, lunch and breaks were provided. One of the facilitators of the breakout sessions was paid a fee, two other facilitators donated their time; those participants travelling from other parts of the state were reimbursed for mileage, and grant paid their accommodation for two nights.

The rest of the funding paid for lunches for seven WINGS Steering Committee meetings and several smaller workgroup meetings.

Technical Assistance: List the ways in which NGN technical assistance was helpful in developing your state WINGS group. What other assistance was needed?

Technical assistance was essential in guiding the group and keeping on track with the WINGS larger goals. It was helpful in adding suggested stakeholders to the group that we did not think about. There were moments of doubt on how to proceed and sustain the initiative, where the experts did not necessarily have the answers but they helped us by suggesting ideas and providing motivation in moving forward.

Technical expert participation in the summit was a valuable addition, particularly in adding a national perspective and summarizing observations at the end of the day. Especially helpful were informal conversations with ideas on possible funding sources and brainstorming on the next steps and expansion.

Sustainability: The essence of WINGS is that it is an ongoing problem-solving entity. How is your state WINGS moving toward that goal? How do you envision WINGS functioning several years from now – both financially and structurally?

We have been meeting regularly and have achieved some results that keep participants committed to participating in WINGS. We were able to narrow down a broad guardianship field to three state specific topics, had a summit that brought together over sixty participants, wrote and will publish articles as a result of the summit, reached out to minority groups and invited them to be part of WINGS, have applied and are applying for grant funding that will keep the program going and will fund a statewide training for the public.

For the WINGS to continue, we need to stay on task with the established meeting schedule. A committed full-time coordinator and a committee chair are essential to move the project forward. Lunches for the Steering Committee meetings is not an overwhelming expense and will be taken over by the Courts. For other goals identified by the Committee, the program coordinator is applying for grant funding that will be supplemented by court resources. Initially, substantial funding is needed to establish the initiatives like statewide training. However, once funding is in place and the coordinator's salary is permanently funded, only program maintenance and improvement need to be addressed.

State Replication: What advice do you have for other states launching WINGS groups? What barriers did you encounter and how did you address them?

We have a dynamic committee chair who is able to keep discussions on track. It is very important to come up with specific practical goals that will lead to reachable outcomes. While starting with big picture issues is a good thing, narrowing it down to smaller action steps will keep the group on task.

Having a committed coordinator who glues everything together is also very important. It needs to be somebody who is attentive to detail and is an effective relationship builder. The establishment of personal connections with committee members keeps them coming to meetings and continuing to accomplish tasks they have agreed to take on. Everyone needs to feel heard at the meetings and taking notes and following up on ideas are essential duties of the coordinator.

Public Relations: Attach any articles about your state WINGS group, or produced as a result of your state WINGS group. Attach all brochures, website links, or other materials WINGS has produced.

See three attached articles from the breakout sessions of the summit. We anticipate that the articles will be published in the May 2014 issue of the *Utah Bar Journal* (in recognition of Elder Law month).

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

To subscribe to the WINGS listserv email to: karolinaa@utcourts.gov.

The administrative office of the courts has published several webpages (<http://www.utcourts.gov/howto/family/gc/>) that describe alternatives to guardianship, nominating someone to serve as guardian, authority and responsibilities of a guardian, and procedures and forms for appointing a guardian.

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