District of Columbia

Working Interdisciplinary Network of Guardianship Stakeholders

Final Report

April 15, 2016
District of Columbia WINGS Report
National Guardianship Network
April 15, 2016

Name:
District of Columbia WINGS

Steering Committee:
The membership of the steering committee was designed to represent the adult guardianship community, to provide a diverse and wide array of professional expertise, and to guide DC WINGS in making strategic decisions about the priorities of DC WINGS, identifying projects, and advocating for future initiatives.

The following organizations and individuals participated on the DC WINGS steering committee members:

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<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Organization</th>
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<tr>
<td>Aisha Ivey-Nixon</td>
<td>Program Manager</td>
<td>Guardianship Assistance Program, Probate Division of the Superior Court of the District of Columbia</td>
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<td>Anne Meister</td>
<td>Register of Wills/Director</td>
<td>Probate Division of the Superior Court of the District of Columbia</td>
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<td>Deborah Royster</td>
<td>CEO</td>
<td>Seabury Resources for Aging</td>
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<td>Dr. Sheila Jones</td>
<td>Chief</td>
<td>Adult Protective Services</td>
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<td>Erik Christian</td>
<td>Presiding Judge of the Probate Division</td>
<td>Superior Court of the District of Columbia</td>
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<td>Fiona Druy</td>
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<td>Iona Senior Services</td>
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<tr>
<td>Jennifer Berger</td>
<td>Supervisory Legal Aid</td>
<td>AARP/Legal Counsel for</td>
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Since the formation of the steering committee, Deborah Royster, changed organizations. She is the former General Counsel of DC Office on Aging. Currently, she is the CEO of Seabury Resources for Aging. Martin Fuller was designated after the initial steering committee and stakeholder meeting.

**Priority Setting:**

DC WINGS did not conduct a survey. Prior to the first WINGS steering committee meeting, a small planning group put together a list of topics that were discussed and prioritized by the steering committee at the June 10, 2015 meeting. The list provided for guidance in developing subcommittees and giving shape to how the subcommittees operated and addressed the previously proposed grant initiatives.

During WINGS summit/stakeholder meeting, the three initiatives identified in the grant proposal were outlined for the larger stakeholder group. Subcommittees were given an opportunity to discuss the initiatives and invited members from the larger stakeholder community to participate in working groups.
The three areas DC WINGS prioritized included:

1) **Training**: Guardianships should be considered the option of last resort. This priority centers on the desire for increased training on capacity assessments, alternatives to guardianship, and services available to assist persons under guardianship.

2) **Public Education**: Member of the public should have the necessary information to determine if guardianship is the best option for an adult who requires assistance with decision making. Despite the available technology, use of multiple platforms including print and media may be necessary to properly disseminate information to the populations most in need.

3) **Guardianship Improvement**: Guardians and conservators are expected to perform ethically, cooperatively, and in the best interest of the person under guardianship. If the guardian and/or conservator does not perform his or her duties appropriately, a mechanism should be in place to inform the court of the concerns.

**Objectives:**

Short-term goals:

1) Increase communication between agencies- government, private, and non-profit, to ensure information is accessible to professionals and the public.

2) Provide training to reinforce guardianship as the option of last resort and ensure alternatives to guardianship are understood and accessible to the public.

3) Provide a basic understanding of capacity and how it is assessed.

4) Develop guardian/conservator complaint process.
Medium term goals:

1) Establish plan to sustain WINGS as an ongoing program and seek funding from the court, District of Columbia government, and/or community organizations.
2) Develop ongoing training initiatives available in-person or via the web on guardianship, its alternatives, and best practices in guardianship.

Long-term goals:

1) Track statistics on the number of cases where an adult is exploited, abused, and/or neglected (include self-neglect).
2) Affirm self-determination of the person under guardianship with careful consideration of safety.
3) Reinforce the principles of supportive decision making and cultural competency ensuring the person’s history, background, preferences, and needs are understood, respected, and considered.

Stakeholders:

Below is the list of stakeholder agencies that attended the WINGS summit and are currently included on an email group regarding DC WINGS activities.

| AARP Legal Counsel for the Elderly | Advocates for Elder Justice |
| Catholic Charities | Child and Family Services Agency |
| Children’s National Medical Center | Collaborative Solutions for Communities |
| Columbus School of Law, Catholic University of America | Community Connections |
| David A. Clarke School of Law, University of the District of Columbia | DC Aging and Disability Resource Center |
| DC Bar, Pro Bono Program | DC Coalition Against Domestic Violence |
| DC Coalition on Long Term Care | DC Courts- Domestic Violence Unit |
| DC Courts- Mental Health and Habilitation Program | DC Healthcare Association |
| DC Hospital Association | DC Long Term Care Ombudsman Program |
| DC Office on Aging | DC Department on Disability Services |
| East of the River Family Strengthening Collaborative, Inc. | Family Matters of Greater Washington |
| Georgetown University Center for Excellence and Disabilities- DC Health Resources Partnership | Green Door |
| Health Insurance Counseling Project | Iona Senior Services |
| McClendon Center | Network for Victim Recovery of DC |
| Office of the Attorney General | Public Defender Service for the District of Columbia |
| Quality Trust | Seabury Resources for Aging |
| So Others Might East- Senior Services | St. Elizabeth’s Hospital |
| Terrific, Inc. | The DC Center for the LGBT Community |
| University Legal Services | Washington College of Law, American University |
| Washington Hospital Center- Center for Ethics | |

**WINGS Meetings:**

Steering Committee Meetings: June 10, 2015, July 13, 2015, August 10, 2015, September 28, 2015, December 7, 2015

Stakeholder Meeting: August 5, 2015

Guardianship Conference and WINGS Update: March 25, 2016

Agendas and flyers are included in Attachments A, B, and C.

**Working Groups:**

Each subcommittee, or workgroup, was responsible for setting their own meetings, developing priorities within the established project guidelines, and determining a timeline for their work. Each steering committee member who attended the initial steering committee meeting volunteered to be a member of at least one subcommittee.

**Subcommittees/Workgroups:** The steering committee created three subcommittees:
Training
  o Three trainings were offered on October 19, 2015, October 30, 2015, and November 6, 2015. Agenda and flyer are included in Attachment D.

Public Education
  o Reviewed available materials in-print and on the court website. Discussed the re-design or re-organization of information on the web. Developed a narrative for online video with an accompanying tri-fold brochure to be posted online and distributed to stakeholder organizations.

Guardianship Improvement
  o Developed a tri-fold brochure and accompanying forms for a new guardian/conservator complaint process.

Results: (as of March 31, 2016)

Achievements:

1) Developed a guardian/conservator complaint process. (Tri-fold included in Attachment E.)

2) Planned and executed three trainings with a total of 100+ attendees on capacity assessments, supported decision making, and alternatives to guardianship. (Agenda and flyer included in Attachment D.)

3) Reviewed the court website, brochures, and videos available to the public. Designed a plan for possible re-organization of information to support a more user-friendly platform.

4) Developed a plan and narrative for an online video describing guardianship, alternatives to guardianship, and community resources for persons who may need assistance with decision-making.

5) Reviewed North Dakota’s guardianship webinar for consideration in future web-based training initiatives for guardians.

6) Informed stakeholders about upcoming community forums related to DDS’ statewide transition plan and proposed budget.
7) Facilitated training on how to approach conversations regarding human sexuality with the person under guardianship and the care team.

DC WINGS promotes a holistic view of guardianship. It values the input and feedback of all its members and encourages participation in trainings, forums, and other groups to ensure the message about safety, choice, accountability, and excellence are shared city-wide. With the addition of DC WINGS, the community feels they have a voice in the court-community partnership and can provide candid input on key issues and selecting initiatives. The development of the complaint procedure is an example of the collective process. Community members voiced their opinion about guardianship, in general, but also used the working group to cite concerns about bringing complaints to the court’s attention. The complaint process is meant to reinforce access to social justice and was developed in a medium that is easier to understand and complete without having to understand the steps of a filing a legal pleading.

Issues related to housing, health care, and decision making for persons residing in facilities, have come up as areas for further consideration. DC WINGS plans to address these issues in the upcoming year. In addition, the steering committee will meet with stakeholders to re-prioritize issues and setup a timeframe for completion for the upcoming year. The steering committee may also wish to consider seeking grant funds to support continued efforts.

**Public Participation:**

DC WINGS identified steering committee members and stakeholder agencies that have access to a larger network of stakeholders. The steering committee solicited feedback and input from this larger network. The steering committee also reached out to these stakeholders to invite them to participate in working groups and attend trainings and the guardianship conference. Email communication and teleconferences appeared to be the most efficient mode of
communication; however, face to face dialogue appeared to have the most positive impact on the court-community relationship.

Family members have been invited, but to due to work and familial obligations, many of the family members were unable to participate. DC WINGS must continue to seek out representatives of this group as they have a unique perspective that may be a shared story among many involved in the guardianship system.

To promote public participation the steering committee may consider:

- Developing a DC WINGS Ambassadors program. The program would provide training to community members on guardianship. The attendees would then train others or spread the word to their communities.

**Technical Assistance:**

NGN technical assistance was essential in reviewing the initial steering committee full-day planning session agenda, stakeholder summit agenda, and brief summary. Conference calls were held with the technical advisor to discuss progress. It was helpful in keeping the initiative on track and assisting in brainstorming next steps.

One of the areas DC WINGS struggled was locating a graphic designer to assist with developing an online video. It would have been helpful if NGN could have provided assistance in this area. Ultimately, the subcommittee drove the effort and located a graphic designer, in-house at one of the stakeholder agencies, who is willing to produce the video at no-cost.

**Sustainability:**

The community indicated a need for information, transparency, trust, and accountability in the guardianship system. The creation of DC WINGS was a response to the community’s request. The steering
committee has met on a regular basis to guide DC WINGS work and ensure the community’s voice was a part of the process. The steering committee recognizes that there are multiple issues related to guardianship matters that may be more appropriately funneled through DC WINGS than individual agencies. It allows for a more coordinated effort.

It is envisioned that DC WINGS would continue to be coordinated via the Probate Division with a steering committee representative of the major guardianship stakeholders. Ideally, DC WINGS would be funded by the court as a Probate Division initiative, but also work with stakeholder agencies to utilize their services and provide assistance with space (small meetings and large meeting/conference), reproduction costs, advertisement, refreshments, and administrative assistance.

The Probate Division coordinated the DC WINGS project. Multiple staff members were involved in the effort including the Register of Wills, Program Manager, Deputy Program Manager, Deputy Clerk, and Legal Assistant. The Program Manager was primarily responsible for coordinating the activities and spent 15% of her time on the project.

State Replication:

Based on the first year of DC WINGS, the following advice is offered to states wishing to launch WINGS groups.

- Engage with the technical advisor on a regular basis. Develop a standing teleconference meeting.
- Remember WINGS is an ongoing process. Do not feel forced to finish all goals within a year’s timeframe. Push back projects based on time needed to ensure a successful product/outcome.
- Determine a method for communication. Determine the best method to engage stakeholders. Remember internet access is a luxury not available to all communities.
- Allow the WINGS Coordinator to have a team, outside of the steering committee, to assist with administrative tasks.
➢ Develop short and long range goals. Focus on low hanging fruit to propel the process and help stakeholders feel accomplished.

Public Relations:

Included in the attachments is an article on DC WINGS (Attachment F) and the tri-fold brochure (Attachment E).


Filing a Complaint against a Guardian or Conservator (tri-fold).

Financial Report:

WINGS grant funding was used to support the breakfast and lunch at the initial steering committee meeting. Funds were requested to support a presenter’s fee, but the speaker denied the honorarium. Funds were also requested to support a graphic designer, who has also agreed to donate his time, in-kind.

DC WINGS promotes positive court-community interaction. It will transform guardianship in a way that balances protection and safety, promotes person-centered planning, and strengthens the community-court relationship. The steering committee looks forward to future efforts of DC WINGS, and plans to create a sustainable partnership with long lasting effects on the city and its vulnerable adult population.

Report prepared by:

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