I. Name: Washington WINGS

II. Steering Committee:

The Steering Committee is responsible for managing, inspiring and supporting the work of the stakeholder network. During the grant period, the Steering Committee identified stakeholder groups and individual representatives; conducted a process to select initial priorities; and discussed, prioritized and made decisions on the WINGS priorities and strategy. In the future, the Steering Committee will make decisions regarding urgent matters and will vet recommendations from working groups and WINGS participants. They are also responsible for seeking funding to sustain WINGS.

The Committee convened seven conference calls, three planning calls before the first stakeholder conference and four calls before the second stakeholder conference to evaluate the first conference, plan the second stakeholder conference, review next steps and check the status of action to implement recommendations.

The following stakeholder entities are represented on the Steering Committee:

1. Washington State Courts (two Superior Court Judges and the State Court Administrator)
2. State Unit on Aging
3. Adult Protective Services
4. Disability Rights Washington
5. Developmental Disabilities Council
6. Certified Professional Guardian
7. Family/Lay Guardian
8. Elder Law Attorney
9. Self-Advocate
10. Public Member - Financial Advisor

Priority Setting:

Prior to the first stakeholder conference, very high-level recommendations were identified using an online survey that was completed by 454 stakeholders including judicial officers, court staff, professional guardians, lay/family guardians, persons with developmental disabilities, family members of persons in a guardianship, social workers, guardians ad litem, attorneys, advocates, mental health professionals, and seniors. The Steering Committee prioritized the high-level recommendations from the online survey and over-laid recommendations from several reports that were completed in Washington State in recent years. Prioritized recommendations clustered into three areas – (1) Supporting the family and friends of persons needing decisional support; (2) Improving assessment of persons needing decisional support; and (3) Improving Guardianship Standards and Practice. Three temporary subcommittees comprised of volunteers who expressed an interest in the topic areas met multiple times, refined recommendations in each area and prepared presentations for the conference.

Objectives: (see attached)

Stakeholders: The stakeholder entities represented in Washington WINGS are listed below. Legislators and legislative staff attended WINGS stakeholder conference but do not participate in stakeholder meetings.
Academic/Scholar, Adult Protective Service Investigator, Professional Guardian, Aging Advocate, Area Agency on Aging Employee, Attorney, Caregiver. County Clerk, Court Employee, Disability Advocate, Disability Professional, Family Member of Person Under Guardianship, Employee of the Department of Health and Human Services, Judicial Officer, Lay/Family/Volunteer Guardian, Long-Term Care Ombudsman, Parent/Non-Guardian, Mental Health Professional, Medical Professional, Social Security Administration Representative, Veteran’s Administration Representative

WINGS Stakeholder Meetings:
August 7, 2015, two-hundred and five stakeholders attended the first stakeholder conference. March 17, 2016, two-hundred and eleven stakeholders attended the second conference.

Workgroups:
Four workgroups were formed to refine recommendations further and implement.

1. The Legislative Committee chaired by Walt Bowen, president of the Washington State Senior Lobby, will provide advice and recommendations on all matters dealing with legislation, including court rules, to WINGS. During a legislative session, the Committee will monitor bills of potential interest to WINGS and select those to be tracked. The Committee may recommend positions on bills for consideration by the full WINGS Steering Committee.

The Legislative Committee formed too late to submit legislation in 2016, but discussed and considered proposing legislation to change the term “Guardian ad litem” to “court investigator”; “alleged incapacitated person” to “respondent”, and “incapacitated person” to “protected person.” The Committee hopes to finalize these and other proposals for the 2017 Legislative Session.

2. The Long-Range Planning/Strategic Planning Committee co-chaired by Associate Professor Lisa Brodoff,1 Seattle University School of Law and retired Professor Larry Weiser,2 Gonzaga School of Law will develop effective approaches to long-range planning for WINGS. Members shall be advocates for and play a leadership role in long-range planning and shall promote a long-term commitment to improving the state’s system of decisional-support.

To date, the committee has focused its research on (1) providing access to conflict resolution to the family and friends of individuals needing decisional support; (2) providing a court-appointed attorney to the respondent in a guardianship proceeding; (3) establishing additional minimum qualifications for Title 11 Guardians ad litem; and (4) establishing a hotline to respond to questions from lay and professional guardians and other surrogate decision makers, family members and persons needing decisional-support.

3. The Standards and Best Practice Committee chaired by Professor Winsor C. Schmidt3, University of North Carolina at Charlotte will develop and recommend that WINGS encourage and/or advocate adoption of standards, guidelines and best practices for entities

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1 http://www.law.seattleu.edu/faculty/profiles/lisa-brodoff
2 https://www.law.gonzaga.edu/faculty/profiles/weiser-larry/
3 https://pages.uncc.edu/wschmid2/
involved in the delivery of decisional-support, including courts, guardians, Guardians ad litem, attorneys, and other professionals.

Since forming, the Standards of Practice Committee has developed proposed standards addressing specific conflicts of interest. The Committee has developed standards that respond to the following questions:

1) Is it appropriate for an attorney to represent the petitioner and the professional guardian in a guardianship proceeding? 2) May a professional guardian petition for guardianship? 3) May a professional guardian accept a referral from a nursing home or residential facility? 4) May a professional guardian who is an attorney represent an incapacitated person for whom he or she provided guardianship services?

4. The Information and Training Committee co-chaired by Meredith Childers, Attorney, Northwest Justice Project, Charlotte Jenson, AOC Court Business Information Coordinator, and Donna Holt, Elder Law Attorney, will develop and recommend development of educational resources and training materials for all entities involved in determining the need for, selecting or delivering decisional-support.

The Information and Training Committee has developed the Table of Contents and completion timeline for a lay guardian training manual and guidance for three levels of court guardianship monitoring. A new AOC website that provides information for persons needing decisional-support and their family and friends, lay and professional guardians and other professionals is in development. The website will include a page for WINGS information and updates.

Results: (as of March 31, 2016)

Quantitative:

Accomplishments

- A stakeholder listserv comprised of more than 12,000 stakeholders was developed.
- Twenty-three recommendation were identified and are being developed.
- A resolution supporting the work of WINGS was adopted by the Board for Judicial Administration, the policy body for Washington courts.
- A stakeholder developed a Facebook page called "Guardianship Hub - Lay/Family Non-certified." She is posting information, links, news articles and Q&A interactions.
- WINGS developed a Hartford Change AGEnt online community page.
  - http://community.changeagents365.org/company005/communities/community-home?CommunityKey=1780d24b-1e60-4c8b-ae42-51d073b764cc
- Four-hundred and fifty-four stakeholders completed the priority setting survey.
- Twenty-eight volunteers refined priority recommendations and developed presentations for the first stakeholder conference.
- Two-hundred and five stakeholders attended the first stakeholder conference.
- Ninety stakeholders volunteered to serve on the four workgroups formed after the first stakeholder conference.
- Two-hundred and eleven stakeholders attended the second stakeholder conference.
- Four workgroups have held more than 30 one-hour conference calls since the first stakeholder conference held August 7, 2015.
- Eleven training sessions have been held.
Qualitative:
WINGS has garnered the attention and support of state legislators, advocates, and the public. Legislators and other organizations consistently seek WINGS input on all guardianship legislation.

Public Participation:
The Steering Committee for Washington WINGS has been meeting with various stakeholders to educate them about guardianship reform and receive comments on the state of the guardianship system. The following presentations were completed:

- October 27, 2015 – Lifetime Advocacy Plus Board Meeting (a non-profit guardianship agency).
- November 12, 2015 - Tacoma-Pierce County Bar Association Guardianship Fall Continuing Legal Education.
- January 21, 2016 – King County Bar Assn Guardianship and Elder Law Section
- February 18, 2016 – The Board for Judicial Administration, the policy body for the Washington Courts.
- March 4, 2016 – Washington State Bar Association (WSBA) Elder Law Section Continuing Education
- March 8, 2016, presented to members of the King County Elder Abuse Council on the Office of Public Guardianship and WINGS.
- March 10, 2016, made a presentation online to the Children, Families, Health, and Human Services Interim Committee of the 64th Montana Legislature on required education for certified professional guardians, lay guardians and WINGS

Technical Assistance:
The National Guardianship Network helped WINGS identify speakers for both stakeholder conferences, reviewed and assistance with meeting agendas, reviewed and assisted with the development of the priority setting survey, and provided research on priority issues. The future of WINGS is resource dependent. Grant writing assistance would be helpful.

Sustainability:
WINGS obtained the support of the courts policy-making body, the Board for Judicial Administration (BJA), which also includes a committee that reviews and approves all budget decision package. This will pave the way for WINGS to obtain funding via the state general fund. With BJA supports WINGS should continue to exist as a Supreme Court entity similar to other Supreme Court Boards and Commissions with regularly scheduled steering committee meetings. Workgroups will be formed as needed, and we hope to hold an annual stakeholder conference. The WINGS coordinator spent a minimum of 1/3 FTE. More time could have been spent if the coordinator had the availability.

State Replication:
The success of WINGS is largely dependent on the ability to bring people with diverse perspectives together who are willing to prioritize the needs of persons needing decisional
support above their personal and career goals. Maintaining a balance of lay and professional stakeholders on the steering committee and workgroups is essential. A good coordinator and committed champion are essential.

Public Relations:
- WINGS was featured in the State of the Judiciary Report. See page 5
  - [www.joom.ag/oSvp](http://www.joom.ag/oSvp)
- WINGS was featured in the Winter 2016 edition of the courts’ newsletter, Full Court Press. See pages 6 to 9
  - [http://www.courts.wa.gov/newsinfo/content/FullCourtPressWinter2016.cfm](http://www.courts.wa.gov/newsinfo/content/FullCourtPressWinter2016.cfm)