



THE OREGON PUBLIC GUARDIANSHIP PROGRAM

Special Report to the Joint Committee on Ways and Means
February, 2018

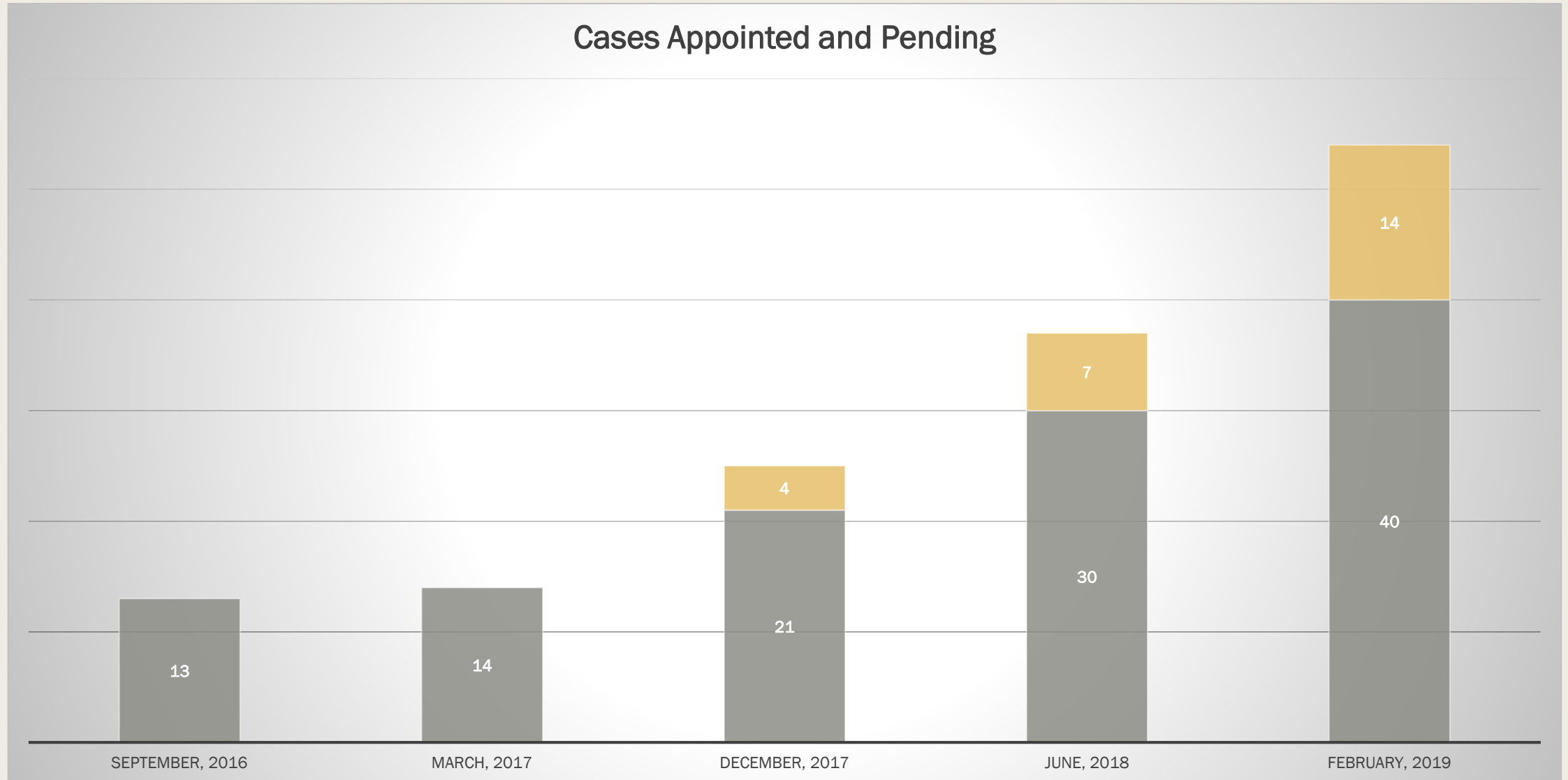
New Partnerships

- Guardianship Conservatorship Association of Oregon
- Oregon Money Management Program
- Senior Citizens Council of Clackamas County
- Office of Adult Abuse Prevention and Investigation
- Guardian Partners
- APD Complex Case Team
- Oregon State Hospital

Entities Who Have Paid for Guardianship Proceedings

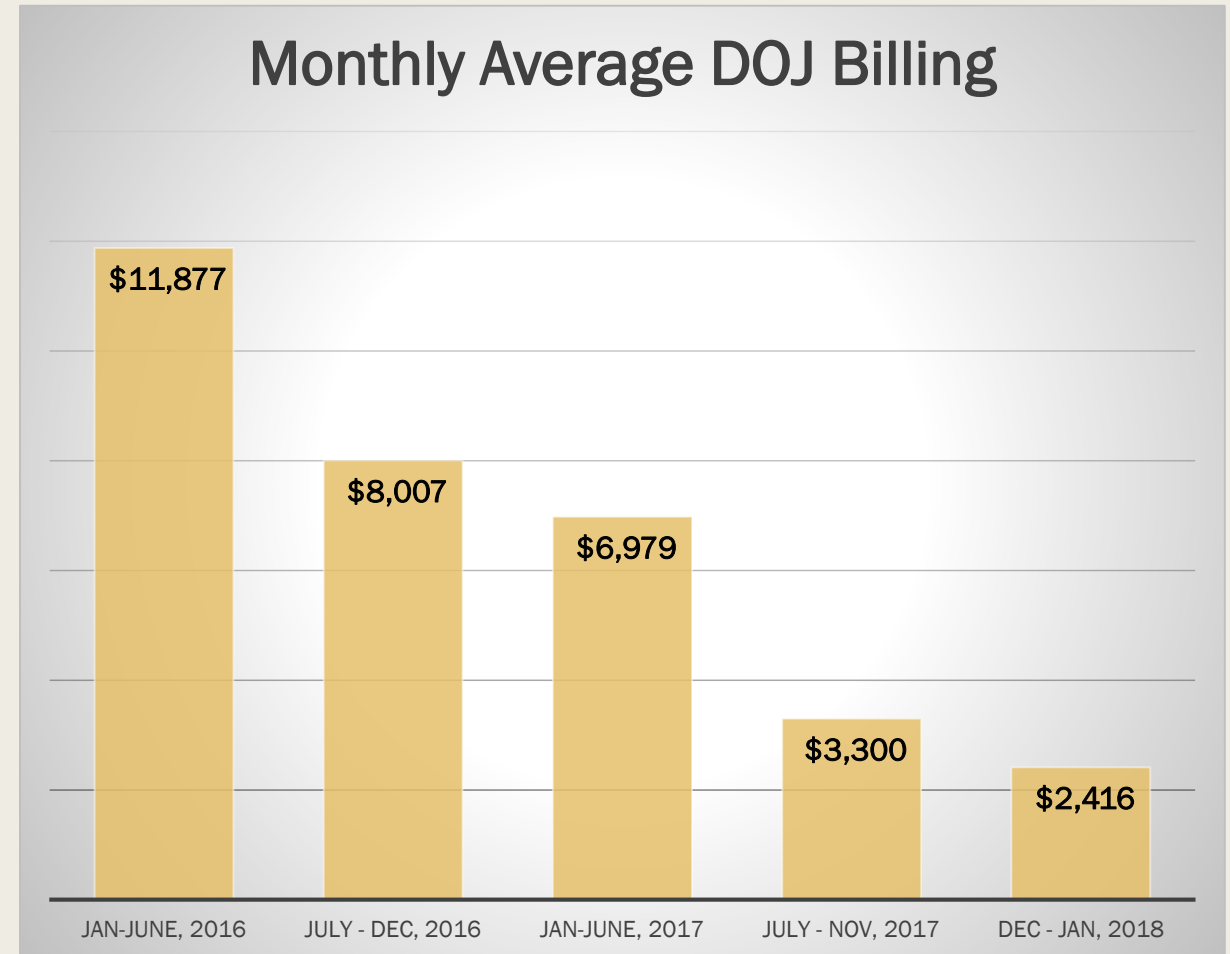
- Lifeways
- Peace Health
- Oregon State Hospital
- Deschutes County Mental Health
- Office of Adult Abuse Prevention and Investigations

Program Growth in Caseload with Current Resources



Decreased Program Costs

- Reduction in DOJ utilization and costs
- Reduced Banking and Bonding costs and requirements.
- Controlled Travel Costs
- Utilization of Contractors



Volunteer Deputy Public Guardian Program

- Intensive 30-40 hour initial training
 - OPGC program training (OPGC)
 - Guardianship and Conservatorship general information and ethical and practice standards (Guardian Partners)
 - Rights of Vulnerable Adults (rights organization)
 - Services delivery systems for government programs, (DHS/APD, OHA, ODDS)
 - Less restrictive alternatives
- Shadowing of program deputies and ongoing mentorship.
- Identification of case to transfer
 - *6 months service as case manager on the case*
 - *If deemed appropriate - transfer of decisional authority to the volunteer.*
- Volunteer contracts for 2 years of service to the client/program.

Mutual Benefits

- OPGC
 - *Increased capacity for caseload*
 - *Quality services for OPGC clients served under this program.*
 - *Ability to influence on the practice of guardianship in Oregon*
- Professional Fiduciaries
 - *Fulfills CEU credit requirements.*
 - *Allows for ability to give back without lifelong responsibility and commitment.*
 - *Allows for better access to resources to serve clients through the OPGC program.*
 - *Would fully prepare new Professional Fiduciaries to effectively serve any type of guardian client.*
- Non professional fiduciaries
 - *Allows for a volunteer opportunity like none other.*
 - *Dedicated advocate and ultimate decision maker for a another person who really need the assistance*

Moving Forward

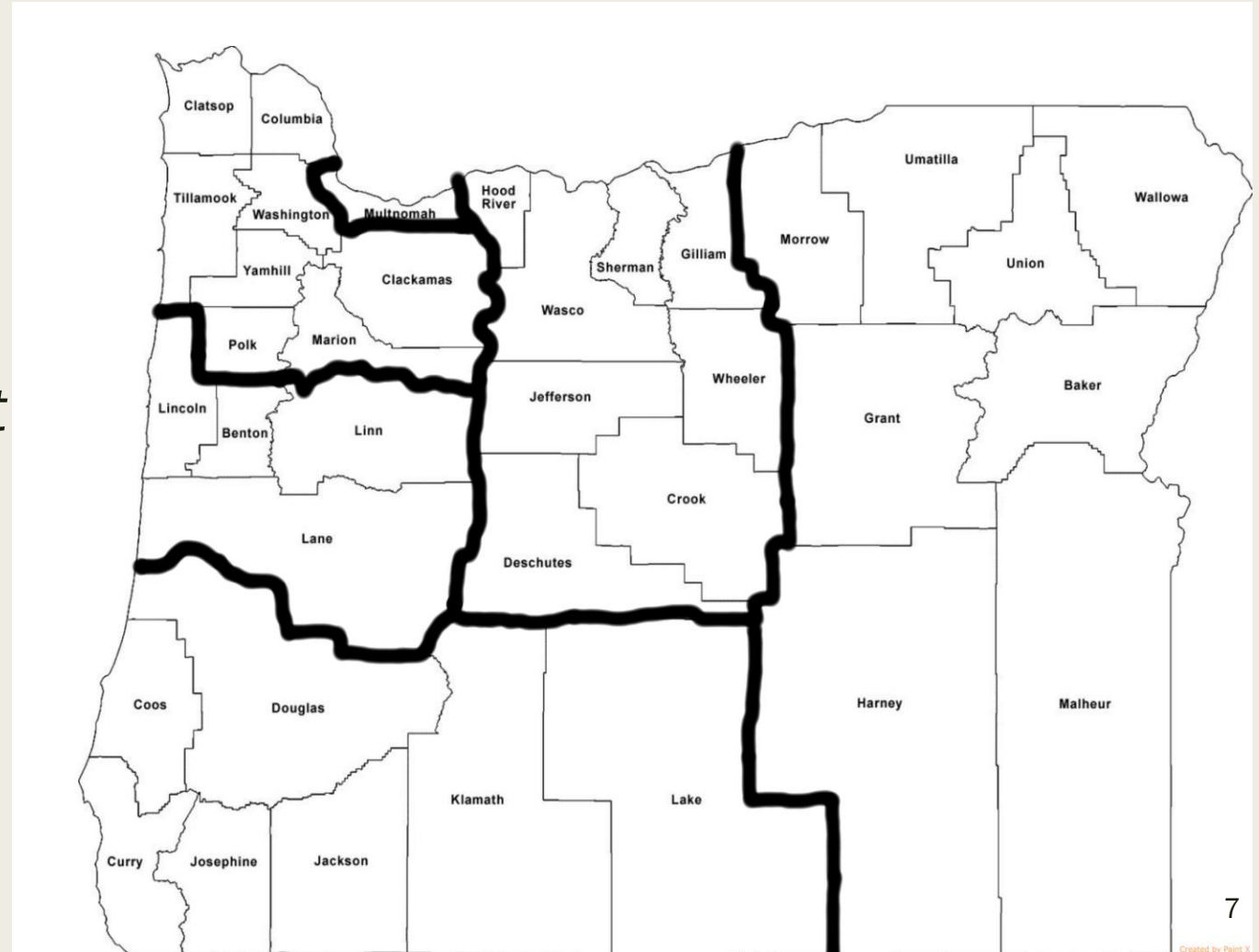
Reach underserved areas:

- Rural areas often lack many of the resources available in higher population areas.

- No established entities exist to contract with for guardian services (*Exception: Jackson County)

- Contain travel costs:
Deputies assigned to district and ideally out-stationed.

Use of local contractors for limited services where available.



Moving Forward

- Maintaining the highest program standards for advocacy and service for our clients.
 - *Only certain cases will be appropriate for transfer contractors or volunteers.*
 - *The interests and safety of our clients will always come first.*
- Increase capacity at the most achievable rate:
 - *Ability to perform initial assessments*
 - *New case stabilization*
 - *Ongoing caseload management*
- Maximize use of Volunteers:
 - *The ability to oversee, foster, develop, maintain, and monitor volunteers*
 - *Cannot be delegated to contract agencies or individuals*
 - *High level of up-front investment in staff time.*
- Balance cost efficiency with risk management and high program standards

PLAN A: Two Deputy Ombudsman (PA2)

- Anticipated hire date of July 1, 2018.
- 18-19 cost of \$195,000 (\$97,500 per FTE)
- Out-stationed in two rural areas of state: Central Oregon, Eastern Oregon, Southern Oregon

Pros:

- Would allow for maximum volunteer development and support in areas of the state in which this would not otherwise be possible.
- Overcomes inability to enter into contracts with individuals in these areas due to risk requirements and lack of qualified or interested parties.
- Increases program capacity by 40 (plus volunteers).
- Reduces existing travel significantly.

Cons:

- Increases state FTE burden

PLAN B: One Deputy Ombudsman (PA2) & Additional Contracts

- Anticipated hire date of July 1, 2018 for Deputy Ombudsman at a 18-19 cost of \$97,500.
- Out-stationed in one rural area of state: Central Oregon, Eastern Oregon, Southern Oregon
- Contracts in the amount of \$48,000 for up front assessments.
- Contract in the amount of \$55,000 in Jackson County

Pros:

- Would allow for volunteer development and support in one additional area of the state.
- Overcomes inability to enter into contracts with individuals in this area due to risk requirements.
- Reduces existing travel to one area of state.
- Increases rate of expansion over Plan A.
- \$48,000 represents up front, one time costs that could later be shifted to additional contracting for case management, guardianship.

Cons:

- Increases state FTE burden by one.
- Less program capacity than Plan A (34 vs 44).
- Less volunteer capacity than Plan A.
- Increased contract/risk exposure.