



Utah State Courts

Court Visitor Volunteer Program

Training Agenda

May 14th, 16th, and 18th, 2012

Matheson Courthouse
Conference Rooms B and C, 1st floor
450 South State Street,
Salt Lake City, Utah

DAY 1

Monday, May 14, 2012

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| 8:00-8:15 | Sign in, pick up materials |
| 8:15 - 8:30 | Introduction: the need in the Court Visitor Program, what problems we will be addressing, why it is important. History of program development (Royal Hansen, Presiding Judge, Third District Court) |
| 8:30 – 9:15 | Structure of the program: what, where, when (Karolina Abuzyarova, Court Visitor Program Coordinator; Tim Shea Senior Staff Attorney, Administrative Office of the Utah State Courts): <ul style="list-style-type: none">• Introduction of Court's staff• Overview of the volunteer roles: expectations, time commitments, length of appointments• What we are going to learn |
| 9:15 – 10:15 | Guardianship law and court procedures (Mary Jane Ciccarello, Director of Self-help Center, Utah State Law Library) |
| 10:15 – 10:30 | BREAK |
| 10:30 – 10:45 | Working with and helping Court employees: judges, court clerks (Tim Shea Senior Staff Attorney, Administrative Office of the Utah State Courts) |

- 10:45 – 11:15 Understanding the role of the guardians (**Margy Campbell, Master Guardian/Owner, Guardian & Conservator Services, LLC; Clara McClane, Director of Older Adult Services, Jewish Family Service**)
- 11:15 – 12:00 Ethics, confidentiality and conflict of interest – the volunteer role and its limits (**Brent Johnson, General Counsel, Administrative Office of the Utah State Courts**)

DAY 2

Wednesday, May 16, 2012

- 8:00 – 8:15 Sign in
- 8:15 – 9:15 Who are the people we will be helping: typical physical and mental conditions affecting individuals under guardianship (**Kelly Davis Garrett, Clinical Neuropsychologist, Intermountain Healthcare; Adina Zahradnikova, Disability Law Center**)
- 9:15 – 10:00 Living conditions of vulnerable adults (**Donna Russell, Director, Office of Public Guardian**)
- 10:00 - 10:15 BREAK
- 10:15 – 12:15 Overview of the problems in guardianships:
- Abuse, neglect and isolation of vulnerable adults (**Nan Mendenhall, Director, Adult Protective Services; Daniel Musto, Executive Director, Long Term Care Ombudsman; Adina, Zahradnikova Disability Law Center**)
 - Financial exploitation (**Keith Woodwell, Division of Securities, State Department of Commerce; Jilene Gunther, Division of Aging and Adult Services Utah Department of Human Services**)
 - Other problems in guardianship matters (**Margy Campbell, Master Guardian/Owner, Guardian & Conservator Services, LLC**)
- 12:15 – 12:45 Available community resources, referrals (**Peter Hebertson, Salt Lake County Aging Services; Brian Guyer, Community Engagement Director, Greater Salt Lake Area and 2-1-1 Information & Referral/Volunteer Center**)

DAY 3 (TRACK 1)

Friday, May 18, 2012

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| 8:00 – 8:15 | Sign in |
| 8:15 – 8:30 | Role and duty of the interviewer role. Need and importance of the service (Michaelle Wells Jones, Court Visitor Volunteer Coordinator) |
| 8:30 – 9:30 | How to get started on the visit, how to best communicate with the guardian and the protected person, how to listen and problem solve (Donna Russell, Director, Office of Public Guardian; Clara McClane, Director of Older Adult Services, Jewish Family Service). |
| 9:30 - 10:00 | Safety matters (Carol Price, Security Director, Administrative Office of the Utah State Courts) |
| 10:00 – 10:15 | BREAK |
| 10:15 – 10:45 | Court case files – how to find them, how to read them, what information to get from them (Joanne Bueno Sayre, Probate Clerk, Third District Court). |
| 10:45 – 11:15 | How to fill out the Court Visitor Report (Tim Shea, Senior Staff Attorney, Administrative Office of the Utah State Courts) |
| 11:15 – 11:30 | Program evaluation (Karolina Abuzyarova, Court Visitor Program Coordinator) |

DAY 3 (TRACK 2)

Friday, May 18, 2012

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| 8:00 – 8:15 | Sign in |
| 8:15 – 8:30 | Role and duty of the tracker and the researcher role. Need and importance of the service (Karolina Abuzyarova, Court Visitor Program Coordinator) |
| 8:30 – 9:30 | Guardianship flow chart: court procedures in guardianship matters. Checklist of documents for guardianship and conservatorship file (Mary Jane Ciccarello, Director, Self-help Center, Utah State law Library) |

- 9:30 – 10:15 The researcher role: preparing case files for hearings and monitoring compliance of guardian’s reports (**Tim Shea, Senior Staff Attorney, Administrative Office of the Utah State Courts**).
- 10:15 - 10:30 BREAK
- 10:30 – 11:15 The tracker role: locating the guardian if the contact information is missing in court files (**Tim Shea, Senior Staff Attorney, Administrative Office of the Utah State Courts**).
- 11:15 – 11:30 Program evaluation (**Karolina Abuzyarova, Court Visitor Program Coordinator**)