

Minutes for November 17, 2023

- I. Updates from Judicial Officers and OJA Staff
 - Present – Bradley; Roesner; VanDerMoere; Winkler
 - Staff – Parker, IOCS; Sprague, IOCT
- II. Review of Cases / Trainings / Resources
 - National Guardianship Association – Orlando
 - Upcoming ICLEF training on December 1 in Marion County
 - Guardianship Evaluation Worksheet – [Link to Worksheet](#)
 - From the University of Southern California – tool for judicial officers
 - Could be utilized in future programs, including a law student GAL clinic
 - Indiana may create a state-specific version in the future
 - Guardianship and Conservatorship Monitoring Statutes Website (coming soon)
- III. Action Items
 - Guardianship Registry Information Sheet – Draft Review
 - Being reviewed by a few other committees – will update committee on final approval process in the future
 - Brochures for Probate Courts – List of Topics Review
 - Rough draft of a brochure will be available by the January 2024 meeting
 - Discussion on ACL Improving Adult Guardianship grant
 - Forthcoming in Spring 2024 – highest court eligible to apply with P&A and APS as a mandatory partner
 - Committee will discuss exact topics of interest in the future
- IV. 2024 Meeting Dates
 - Friday, January 12 at 12pm
 - Friday, March 8 at 12pm
 - Friday, April 12 at 12pm
 - Friday, June 28 at 12pm
 - Friday, September 13 at 12pm
 - Friday, December 20 at 12pm

Minutes approved on January 12, 2024 by vote of Adult Guardianship Committee.

Minutes for October 6, 2023

- I. Updates from Judicial Officers and OJA Staff
 - Present – Bradley; Certo; Houk; Meltzer; Roesner; Vandermoere; Winkler
 - Staff – Parker, IOCS; Robinson, IOCS; Sprague, IOCT
- II. Review of Cases / Trainings
 - Judicial Conference Training (9/15/23)
 - Reflection on the event
 - Judges found the training to be very helpful – events like this should be on as many future agendas as possible
 - A lot of people are looking for specialized knowledge – a session does not have to have 150+ people to be a success – there seems to be more interest in doing a good job at guardianship cases than would be reflected in audience numbers
 - Based on the training, some judges in the southwest portion of Indiana are going to touch base and take notes on local practice
 - Many local counties are using bench bar conferences or local bars for training
 - There was recently an event held in Allen County by the Northeast Indiana Guardianship Conference – agenda included in minutes
- III. Action Items
 - Guardianship Registry Information Sheet – Draft Review
 - Committee approved revisions shown at meeting, with caveat that an “additional sheet” (referenced on the draft) should also be created
 - AGO will take leave to incorporate these suggestions, with an updated draft available at the January 2024 meeting
 - Brochures for Probate Courts – List of Topics Review
 - Committee approved topics as a framework for brochures
 - The committee approved of the idea to have a supplementary “cascading folders” version of this same information hosted online
 - Rough draft of a brochure will be available by the January 2024 meeting
 - Discussion on Guardianship Case Numbers and Best Practices
 - Discussion was held on what to do about high case numbers; judges acknowledged the ability to review case numbers or ask IOCS/IOCT for information on number of guardians reported for a particular petitioner/candidate (demo available upon request)
 - Some judges have denied guardians due to high numbers and falling behind in filing reports to the court; in these cases
 - Discussion on Probate Bench Book
 - There might be a way to enhance the existing Probate Bench Book and integrate guardianship in that existing document
 - Future discussion will decide on the need for one document or splitting it

IV. Upcoming Activities & Next Meeting Agenda Items

- Ask judges to share issues they are seeing and trends in their own courts
- Solicit action items for next meeting
- Meeting dates for 2024 will be announced at next meeting

Minutes approved on January 12, 2024 by vote of Adult Guardianship Committee.

Minutes for August 18, 2023

- I. Welcome and Introductions
 - In Attendance – Bradley; Roesner; VanDerMoere; Osterday; Meltzer; Certo
 - Staff – Parker, IOCS; Robinson, IOCS
- II. Background on Committee
 - Discussion on the role of the committee (overseeing work of Adult Guardianship Office (AGO); providing judicial input to office activities; coordinating guardianship programming)
 - Probate Committee shares some of our topics of interest, including minor guardianship
- III. Action Items
 - Guardianship Registry Information Sheet Revisions
 - Committee approved the idea of revisions
 - AGO will bring proposed revisions to future meeting
 - Brochures for Guardianship Courts
 - Committee approved the idea of brochures – they will be PDFs that are hosted online instead of printed to avoid outdated information being distributed
 - Categories for brochures will be shared at future meeting
 - Information and Documents Hosted on Indiana Legal Help
 - Committee approved the idea of contacting the Bar Foundation in the future to ask for certain documents to be hosted on Indiana Legal Help
 - Future discussion on what forms and what versions will be hosted will occur
 - Upcoming Trainings
 - Guardianship Symposium to be held on 9/6/23
 - Session at the Judicial Training to be held on 9/15/23
- IV. Upcoming Activities & Next Meeting Agenda Items
 - Ask judges to share issues they are seeing and trends in their own courts
 - Solicit action items for future meetings

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