MESSAGE FROM THE EXECUTIVE DIRECTOR

At Guardian Partners, we’re growing to meet growing needs. Factors like rising costs and an aging population are straining resources more than ever. Families caring for a disabled loved one or taking custody of a child feel the squeeze and Guardian Partners has responded.

**New Communities.** Since last summer we’ve added seven new counties to our service area: Clatsop, Gilliam, Hood River, Jackson, Sherman, Wasco and Wheeler. We’re actively recruiting volunteers and look forward to serving these communities with education and case monitoring.

**New Training.** The Guardian of Minor course is our most recent to be updated. Speaking to both the legal implications as well as the softer, parental aspects of this role, it’s provided – as always – free of charge and we aim to offer it in all Oregon counties.

**New Staff and Board Members.** As our work has grown, so too have our staff and board. This spring, we hired Development Officer Denny Richard to take the lead on fundraising and grant writing efforts. And we welcomed to our Board of Directors Debbie Scales, of the Jackson County Circuit Court; and Miguel Santos, of Key Bank.

This growth is made possible by your continued support. Thank you.

Marc Kochanski, Executive Director
May 2023

marc@guardian-partners.org or 971-409-1358
MONITORING

Guardianship is a powerful legal arrangement and there is little oversight. That's where our volunteers come in. We train volunteer case monitors to visit adults under guardianship and conduct wellness interviews, looking for signs of abuse or exploitation, and making sure they are being well cared for by their guardians. Often, the monitor shares resources or referrals benefiting the protected person and guardian. Finally, the monitor offers a report to the Court with our recommendations. A case typically requires eight to ten hours of volunteer time, but can take longer if issues arise.

2022 Impact

- **135** Cases Monitored
  - Clackamas: **24**
  - Jackson: **1**
  - Multnomah: **97**
  - Tillamook: **12**
  - Yamhill: **1**
- **500+** hours of service by **43** volunteer Case Monitors
- **44** reports (33%) recommended intervention by the court.
- **57** cases (42%) benefited from shared resources or referrals.
- In **four** cases, our monitor recommended termination of a guardianship which seemed unnecessary. In all four, the judge ultimately terminated guardianship, resulting in restoration of the protected person’s individual rights.

“**The idea of a review can be nerve wracking, but it’s really just an open and honest dialogue with people who truly care about the people they advocate for... It was informative and offered a lot of resources I had no idea existed.**” – Billie W., Guardian of Adult

EDUCATION

Being appointed a lay guardian or other fiduciary is a serious responsibility, often one not expected nor planned for. We offer an array of online courses and other resources to educate non-professional fiduciaries on their legal and ethical responsibilities. Attorneys and other expert professionals instruct our classes and review content annually to reflect statutory changes.

- **Guardian of Minor** course is offered free-of-charge. Fee for **Guardian of Adult** is $100; **Conservator, Personal Representative, and Trustee** courses are $150.
- Course fees are waived when court fees have been waived.
- Cost of language interpretation is covered for court-mandated attendees.
- Although they are geared toward new guardians and fiduciaries, our courses are open to anyone. Attorneys, financial planners, and workers in long-term care facilities are some of the professionals who have benefited from viewing.

2022 Impact

- **Total Class Attendees:** **3,413**
- **Attendees by County:**
  - Clackamas: **895**
  - Douglas: **240**
  - Jackson: **78** (serving since 9/1/22)
  - Lane: **119**
  - Marion: **207**
  - Multnomah: **1,441**
  - Tillamook: **111**
  - Yamhill: **258**
  - Other counties: **64**
- **Attendees by Class Type:**
  - **Guardian of Adult:** **576**
  - **Conservator:** **219**
  - **Guardian of Minor:** **296**
  - **Personal Representative:** **2,302**
  - **Trustee:** **18**
- **86%** Personal Representative class participants who reported learning “Much More” about their duties.
- **82%** Guardians who said they learned “Much More” about protecting a child or an adult with cognitive disabilities from abuse and neglect.

“I am a teacher and have gone through countless presentations and videos very similar to this—but yours is very well done and helpful. Thanks for what you do for kids!” – 2022 Guardian of Minor
Thank You for Volunteering

Janis Adler  Liz Gatti  Jennifer Jordan  Lauren Raymond
Vince Bernabei  Andee Gude  Vadim Kachur  Merri Reamer
Maria Blaszkiw  Kirstin Hamann-Ater  Hannah Maerowitz  Austin Robinson
Emily Clark Cuellar  Sharon Hatch  Nadine Maleski  Suzanne Rowe
Sarah Cline  David Hicks  FrancineMcCown  Rosanna Sanger
Amanda Conner  Jon Howe  Nancy Neuman  Heidi Sherman
Jennifer Davison  Morgan Hunnicutt  Erin Newell  Jerry Spegman
Claire deVroede  Jeri Jenkins  Joyce Ochsner  Melanie St. John
Joan Driver  Barb Johnson  Marjolie Pacifico  Ashley Taylor
Rachel English  Sara Johnson  Aphrena Portilla  Rob Yorke
Kayle Fivas

Thank You Founders Circle Members (donations of $1,000 or more)

Gary Beagle  Kristen McCall
Juliet Britton  Tim Porter
Shannon Conley  Helen Robinson
Katie Garman  Bob & Sylvia Sutherland
Michael & Pamela  Katherine Tennyson
Greenlaw  Amy & Michael Welsh
Jim Hollis  Thressa Hollis
Theresa Hollis  Sue Mackley

2022 Total Income: $536,590

76% Earned Income (Course Fees)
15% Events
7% Private Grants
1% Donor Contributions
1% Miscellaneous

Thank You Sponsors & Grant Funders

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DO WE SERVE YOUR COMMUNITY?

If not, we’d love to. Our goal is to bring guardian education and case monitoring programs to every Oregon county. We offer flexible program options for counties who wish to partner with us and there is no cost to the Court.

We have tools including sample language and document templates to make the process easy for the Court. Contact Executive Director Marc Kochanski about adding your county to Guardian Partners’ service area.

SAVE THE DATE!

Our fall Partners Party benefit is Wednesday, October 4 at The Loft at 8th Avenue

Contact Executive Director Marc Kochanski about admission or event sponsorship: marc@guardian-partners.org