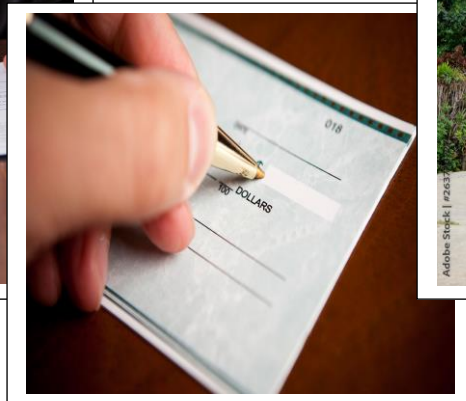
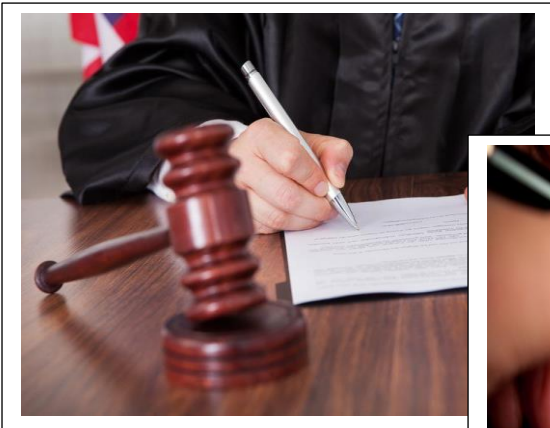


*Canyon County
Board of Community Guardians*

**FY2023
Annual Report**



Guardians * Conservators * Companions

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#11
Caldwell, ID 83605
Telephone 208-455-5969
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Email Community.Guardians@canyoncounty.id.gov

January 30, 2024

Canyon County Board of County Commissioners
1115 Albany Street
Suite 100
Caldwell, ID 83605

Dear Commissioners,

I am pleased to present the 2023 Annual Report on behalf of the Board of Community Guardians.

This report is made in accordance with the requirements of Idaho Code §15-5-603 and provides information on the performance of the public guardian and conservator functions during FY2023.

Yours sincerely,

Yvonne Baker
Director of Indigent Services
Coordinator, Board of Community Guardians

Acknowledgements

We acknowledge the lives of our clients, whose rights and interests we strive to promote and protect. We thank them and their support networks for engaging with us while we work to achieve the best possible outcomes for the people we serve. We also acknowledge the experience and expertise of our volunteer board and county staff who directly support vulnerable adults with impaired decision-making capacity.

OUR CLIENTS

Angelina	Grace	Leonard	Patricia
Aurora	Hattie	Lori	Robert
Betty	Jana	Mark B.	Roger
Bob	Jennifer	Mark P.	Rosemary
Bruce	Joan	Michael P.	Tavie
Carmen	Joanne	Michael S.	Teresa
Doris	Jose	Michelle	Teri
Emilie	Karen	Milorad	Travis
Fidel	Keri	Nanette	Wade
Gene	Leavitt	Neta	

Volunteers & Staff

BOARD MEMBERS

Mary Jo Campbell	Appointed	06.21.13
Joan Colombo	Appointed	07.12.16
Eva Gohr	Appointed	11.09.21
Dottie Neher	Appointed	12.01.98
Lorinda Norton	Appointed	06.15.23
Susan Puga	Appointed	08.11.20
Claire Roper	Appointed	11.22.89
Bailey Wilson	Appointed	08.08.23
Mary Confer	Resigned	03.21.23
Carol Foster	Resigned	01.25.23
Marilyn Freeman	Resigned	06.12.23
Mary Kay Gordon-Brunner	Resigned	12.27.22
Jean Udesen	Resigned	03.21.23

CANYON COUNTY ADMINISTRATIVE STAFF

Kellie George
Jenn Odom
Yvonne Baker

In reflecting on the past year, we can only describe it as one of tremendous change. No one could have predicted that the environment in which we work and provide services would be evolving so rapidly. We have been in the unique position of observing not only the ever-evolving landscape in which the community guardians provide services, but also first-hand how our department has moved through that change. Navigating the unknown requires the best of us – it encourages us to stretch ourselves and sharpen our focus on what matters most. For the community guardians, what has always mattered most is caring for our clients and ensuring they are heard. Our purpose – to protect and promote their well-being – remained the constant amongst the uncertainty. That purpose brought out the very best in us.

As the pages of this report will attest, the Board of Community Guardians was able to navigate change because of the dedication of our people. Despite the obstacles and loss in volunteer guardians, those that remained kept the adults we support front and center throughout and we had an equally committed group behind the scenes. Delivering these services in such times is not an easy task, yet our staff rose to every challenge with resilience and optimism.

Looking inward to excel outwards

In periods of external uncertainty and change, looking inward with the focus and intent on what we, as a Board, can do to solve the ongoing need for guardianships has led to an ambitious agenda for improvements. The year 2023 saw a continued increase in demand for our services. We therefore invested in additional staff for guardianship, investigations and visiting. We also partnered with several hospital and health services to establish those vital relationships.

This has been a year of self-evaluation, which has proven to be an effective motivator for change. By tuning in to our internal workings, we created opportunities to improve our outward services. We are firm on our objectives - to have a positive impact on the people we serve – and we have a better understanding of how to do it.

Looking forward

Our agenda for 2024 focuses on a strategy to maximize the impact of our work on our clients' lives in the community we serve. We anticipate the increase in demand for our services will continue in 2024. Our service environment is complex, influenced by growth in the guardianship system. More broadly, factors such as an aging population, increased prevalence of mental health conditions, dementia, increased awareness of elder abuse, and changes to public benefits such as Social Security and Medicaid and other aged-care systems will contribute to this upward trend. There is much on the horizon, and we will need to be agile as new challenges and priorities emerge. We welcome the support and engagement of our fellow social service agencies, healthcare workers, government partners and citizens.

*Canyon County
Board of Community Guardians*

Accomplishments in FY23

People:

Volunteer guardians, board members and county staff met to begin establishing new relationships. Met with clients and health care staff at nursing homes, assisted living facilities, certified family homes and supported living agencies to determine needs of newly assigned clients. Purchased needed items for clients; moved personal belongings; assisted with placement into new facilities.

Process:

Attended Board meetings to discuss clients, approve expenses and define policies. Prepared files to house guardianship and conservatorship documents for all clients. Created essential forms including financial ledgers, referral applications, and client/benefit lists. Hired one additional staff member. Completed Idaho Supreme Court training for guardians and conservators. Developed process and investigation for new referrals. Developed process for payment of client expenses and maintaining financial accounts.

Product:

Prepared annual guardianship, conservatorship and representative payee reports. Received training and access to Odyssey to file annual guardianship and conservatorship reports. Designed content and forms for the community guardians' website.

Challenges in FY23 and beyond

- Having an established central agency to provide education, training and guidance to counties regarding guardianships, conservatorships, volunteer boards, elder care, and Medicaid.
- Lack of alternative resources to a guardianship, should a volunteer board/guardian be unable to accept a new referral.
- The cost and onerous process for a family member or friend to petition the court to become a guardian and conservator of a vulnerable adult. The lack of resources or financial assistance to assist family members in need.
- The community guardians' ability to access financial information of a vulnerable adult under a temporary guardianship and conservatorship.
- The requirement that only a guardian can authorize the transfer of a patient from a hospital to a nursing home, when next of kin is not available.

Annual Impact

Number of vulnerable adults served	39	6	Passed Away
Females	22	17	Males
Volunteer Board Members as of 10.1.22	11	8	Current number of Board members
New Referrals 10.1.22 to 9.30.23	19	3	Referrals approved
Referrals denied-lack of guardians available	13	3	Referrals denied-available family member

Duties of a Guardian

- Responsible for the personal care, custody and welfare of a ward (client).
- Visit with clients to ensure needs are being met; companionship.
- Assists in making decisions on behalf of a client including their basic needs, residence, health care and personal belongings.
- Ensures the client's social, emotional and medical needs are met to include arranging for regular medical care and social activities.
- Assists the client with many other decisions and encourages the client to be involved in their own decision making, when possible, including relationships, job training, personal hygiene and medical treatment.
- Files annual reports to the Courts for each client to advise the court of any changes to residency, care, behavior and medical condition.
- Available 24/7 for calls from care facilities or clients regarding emergencies or need for medical care.
- Attends care conferences, residency placement meetings, medical appointments, and annual disability assessments.

Duties of a Conservator

- Responsible for the protected person's (client's) estate including home, real property, personal belongings, bank accounts, cash, investments, retirement benefits, motor homes, vehicles and other valuables.
- Fiduciary duty to pay the client's expenses.
- Files client's tax returns, if applicable.
- Sets up conservator bank accounts and arranges for receipt of client's income benefits. Maintain bank ledgers and reconciles monthly bank accounts.
- Enters into contracts on behalf of the client.
- Files annual reports with the Courts for each client of the income, expenses and assets for each year.
- Files annual Social Security representative payee reports for income received and expenses paid.
- Files annual Social Security Representative Payee reports and participates in all audits requested by the Social Security Administration and its affiliates.

CLIENT ACCOUNTS 10.1.22 TO 9.30.23

Name	Beginning Balance	Income	Expenses	Net Funds	Burial Savings
A, T	\$817.09	\$9,066.00	\$9,119.18	\$763.91	\$1,000.08
A, N	\$1,738.51	\$9,527.01	\$9,112.00	\$2,153.52	\$0.00
B, M	\$25.00	\$15,654.86	\$11,684.35	\$3,995.51	\$1,500.08
C, C	\$5,342.66	\$9,908.18	\$11,442.38	\$3,808.46	\$1,500.00
F, K	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F, L	\$1,139.90	\$18,972.00	\$18,704.36	\$1,407.54	\$1,492.42
F, R	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
G, T	\$2,434.53	\$10,266.00	\$10,830.33	\$1,870.20	\$0.00
G, B chkg	\$5,534.25	\$34,667.68	\$36,112.63	\$4,089.30	\$51.83
G, B Miller Trust	\$323.58	\$3,750.00	\$0.00	\$4,073.58	\$0.00
G, N	\$6,206.75	\$9,046.50	\$8,314.31	\$6,938.94	\$0.00
G, F	\$5,590.00	\$21,184.92	\$25,461.36	\$1,313.56	\$1,500.08
H, D	\$2,186.90	\$10,182.06	\$9,764.00	\$2,406.96	\$1,800.23
H, L	\$2,168.89	\$3,306.18	\$5,475.07	\$0.00	\$0.00
I, R	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.02
J, B	\$1,949.82	\$6,958.15	\$375.96	\$8,532.01	\$0.00
J, J	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
K, T	\$7,494.81	\$7,521.10	\$12,993.58	\$2,022.33	\$1,500.18
K, H	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
K, W	\$2,055.59	\$10,600.00	\$10,495.50	\$2,160.09	\$1,500.20
L, M	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
M, J	\$9,442.73	\$24,215.39	\$17,967.66	\$15,690.46	\$0.00
M, A	\$60.00	\$974.00	\$324.64	\$709.36	\$0.00
M, A	\$2,121.94	\$12,324.51	\$12,833.98	\$1,612.47	\$0.00
M, J	\$1,130.21	\$98.60	\$10,317.16	\$673.05	\$1,000.25
P, J	\$2,123.57	\$9,853.96	\$9,219.91	\$2,757.62	\$0.00
P, E	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
P, G	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
P, M x9780	\$2,000.00	\$3,934.00	\$1,766.97	\$4,167.03	\$1,501.03
P, M x0778	\$4,946.87	\$10,159.00	\$13,897.03	\$1,208.84	\$0.00
P, M ICCU chkg	\$273.06	\$800.00	\$863.75	\$209.31	\$0.00
P, M ICCU sav	\$29.89	\$1,750.00	\$1,754.00	\$25.89	\$0.00
P, M	\$2,514.96	\$11,129.03	\$10,166.94	\$3,477.05	\$0.00
R, M	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
S, R	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
S-B, Jana	\$4,507.50	\$19,744.00	\$18,835.65	\$5,415.85	\$1,500.20
S, M	\$1,642.00	\$8,210.00	\$9,827.00	\$25.00	\$0.00
S, P	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
T, L	\$4,228.64	\$9,908.00	\$11,962.28	\$2,174.36	\$0.00
T, R	\$2,574.26	\$24,786.03	\$25,751.09	\$1,609.20	\$1,000.25
W, T	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
W, G	\$2,627.50	\$9,908.00	\$10,741.00	\$1,794.50	\$0.00
TOTAL:	\$85,231.41	\$328,405.16	\$336,114.07	\$87,085.90	\$18,346.85

*The County does not serve as the Social Security representative payee or manage payment of the client's expenses.

Board of Community Guardians Financial Accounts

Account	Beginning	Income	Expenses	Net Funds
Operating	\$9,977.35	\$6,906.21	\$3,515.98	\$13,367.58
Money Market	\$14,200.20	\$42.55	\$0.00	\$14,242.75
TOTAL:	\$24,177.55	\$6,948.76	\$3,515.98	\$27,610.33

Our Strategic Plan

Organizational goals	We will achieve this by
Provide resources to individuals who may be interested in serving as a guardian/conservator on behalf of a vulnerable adult.	Develop an informational packet to include resources for legal assistance, training, court process, representative payee, Medicaid contact, and other information regarding duties of being a guardian and/or conservator.
Increase number of guardians and companions.	Recruit at universities; target individuals with interest in social services; ask colleagues for personal referrals of family or friends that may be interested.
Gain a comprehensive understanding of the mental health complexities of our clients for overall better engagement.	Seek out training and extended educational courses focusing on dementia, neuro-cognitive disorders, developmentally delayed and schizophrenia; participate and become members of national and local organizations focusing on guardianship and conservatorship mentoring and education.
Explore expansion strategies for the BOCG	Continue to monitor program: develop core services outline; evaluate manpower needed for core services; plan for loss of volunteers and how best to cover services; project future service needs and work space.
Software: selecting the most appropriate type of software to meet our needs.	Research if Computer Arts has additional capabilities to meet our needs for guardian and conservator data input and reporting or whether other software may be more suitable.
Education and training for volunteers and staff regarding guardianships, conservatorships, behavioral health, healthcare and local resources.	Contact Idaho Guardian and Fiduciary Association regarding membership and educational opportunities; Continue to work with Commissioner Brent Reinke and his committee in Twin Falls; collaborate with Janet Caufield, 3 rd District Guardianship Monitor.

**State & Federal
Government**

Idaho Supreme Court
Health & Welfare
Social Security

Care Facilities

Caldwell Care
Canyon West
Karcher Estates
Ashley Manor
WellSpring
Aspen Creek
Orchards
Sunnvridge

Local Government

Prosecuting Attorney
Public Defender
Courts
Law Enforcement
Ada County
Payette County
Twin Falls County

*Board of
Community
Guardians*

The Board partners
with other agencies
to achieve its goal
of providing the
best care, benefits
and resources
available for the
clients it serves.

Supported Living

Certified Family
Homes
Ambitions, Inc.
Communicare
New Leaf
HISway, LLC
Abilities, Inc.

Health Facilities

West Valley Medical
St. Luke's Nampa
St. Alphonsus Nampa

Health Care

Blue Cross of Idaho
Medicaid
Molina
Medicare
Plan Coordinators

Financial

US Bank
Wells Fargo
First Interstate Bank
ICCU
Pre-Paid Burials