100 Miles an Hour: Getting from Project to Law in Three Years in Indiana

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What we will cover

• Timeline and project details
• SDM by the numbers
• Discussion of successes and challenges:
• Next steps
## Timeline – 2017

<table>
<thead>
<tr>
<th>Month</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>SDM bill filed – FAILED - Summer Study</td>
</tr>
<tr>
<td>Feb</td>
<td>Met to discuss grant opportunity</td>
</tr>
<tr>
<td>Mar</td>
<td>Applied for WINGS Expansion Grant</td>
</tr>
<tr>
<td>Apr</td>
<td>Awarded</td>
</tr>
<tr>
<td>May</td>
<td>Awarded WINGS Expansion Grant</td>
</tr>
<tr>
<td>Jun</td>
<td>Initial Grant Planning Meeting</td>
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It Begins...
Project Conception

• WINGS Group Members
• Determining who to involve
• Determining where to start
• Understanding what is out there
WINGS Supported Decision-Making Grant Project

• **Goal:** To develop a county-level judicial reform project that reduces the need for guardianship using supported decision-making.

• **Objectives:**
  – Community education
  – Screening tools
  – Case referral and management model
  – Training for judges and *pro bono* GALs
WINGS Project Stakeholders

- Project Stakeholders include:
  - The Honorable Gregory Horn, Wayne County Superior Court
  - Indiana Supreme Court
  - Indiana Disability Rights
  - Achieva Resources, Inc.
  - The ARC of Indiana
  - The Indiana Division of Disabilities and Rehabilitative Services
  - The Indiana Division of Aging
  - Indiana Adult Protective Services
  - Indiana Legal Services, Inc.
  - The WINGS/Adult Guardianship State Task Force
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<thead>
<tr>
<th>Month</th>
<th>Event</th>
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<tbody>
<tr>
<td>Jul</td>
<td>Developed initial materials</td>
</tr>
<tr>
<td>Aug</td>
<td>Summer Study Committee on SDM</td>
</tr>
<tr>
<td>Sep</td>
<td>Project planning</td>
</tr>
<tr>
<td>Oct</td>
<td>GAL Training (Wayne County)</td>
</tr>
<tr>
<td>Nov</td>
<td>Started regular education events</td>
</tr>
<tr>
<td>Dec</td>
<td>Planning and education events</td>
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Edith – Sept. 6, 2017
Early Planning

• Identification of needs
  – Forms
  – Education – by audience with targeted message

• Project logistics

• Common language
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<tr>
<td>Jan</td>
<td>Training event for parents in Wayne County (no one showed)</td>
</tr>
<tr>
<td>Feb</td>
<td>Began planning w/ Jamie Beck, parent event 2.0 (no one showed); Implementation phase begins in Wayne Sup. Ct. 2</td>
</tr>
<tr>
<td>Mar</td>
<td>Preparing petition to terminate, educating supporters</td>
</tr>
<tr>
<td>Apr</td>
<td>Case file review begins monthly in Wayne County</td>
</tr>
<tr>
<td>May</td>
<td>5/7 Filed Petition to Terminate Guardianship of Jamie Beck</td>
</tr>
<tr>
<td>Jun</td>
<td>6/13 Hearing on Petition - Granted</td>
</tr>
</tbody>
</table>
Project Implementation

• Revision of forms – again
• Collecting stakeholder input and feedback
• Ongoing education
• Data collection
• Petition documents and preparation
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<tr>
<td>Jul</td>
<td>Legislation Stakeholders begin regular meetings</td>
</tr>
<tr>
<td>Aug</td>
<td>Drafting legislation, meeting w/ stakeholders and opponents</td>
</tr>
<tr>
<td>Sep</td>
<td>IDR Launches SDM/Guardianship Resource website</td>
</tr>
<tr>
<td>Oct</td>
<td>Draft legislation finalized, GAL Training in Lawrence County</td>
</tr>
<tr>
<td>Nov</td>
<td>Education Event for Legislators, start expansion to Monroe County</td>
</tr>
<tr>
<td>Dec</td>
<td>Status hearing for Jamie Beck - Court no longer retains jurisdiction</td>
</tr>
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Legislation Planning

• Engaging stakeholders
  – Aging
  – Disability
  – General

• Opposition
  – Probate bar
  – Professional guardians

• Legislation drafting process
## Timeline – 2019

<table>
<thead>
<tr>
<th>Month</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>Jan</td>
<td>Meeting 1:1 with legislators and opponents/stakeholders</td>
</tr>
<tr>
<td>Feb</td>
<td>Passed unanimously out of Senate Committee and full Senate</td>
</tr>
<tr>
<td>Mar</td>
<td>Passed unanimously out of House Committee and full House</td>
</tr>
<tr>
<td>Apr</td>
<td>Legislation signed by Governor</td>
</tr>
<tr>
<td>May</td>
<td>Initial results of research on SDM presented</td>
</tr>
<tr>
<td>Jun</td>
<td>Train the trainer event</td>
</tr>
<tr>
<td>Jul</td>
<td>Law goes into effect</td>
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SDM by the Numbers

- 45 presentations
- 36 project stakeholder meetings
- 20 legislative meetings
- 49 case files reviewed
- 4 clients assisted
- 13 products developed
- 480 hours of documented work (MLK)
Products Developed

- Model SDM Agreement (10 versions)
- Model Physician Statement
- Model GAL appointment order
- Model GAL report
- Termination of Guardianship Template
- One-page handouts
- Audience targeted presentation slides
- Website
- Videos
Successes and Challenges

- THE FORM
- Education, education, and more education
- Combating opposition
- Building Coalitions
- Engaging stakeholders
- LRA Study
Next Steps

• Continuing education – train the trainer
• Development of materials and resources for families, supporters, attorneys and judges
• Expansion of project to other counties
• Vigilance on the legislative front
Next Steps
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