**“Honoring Diversity in Guardianship”**

**2017 Texas Guardianship Conference**

**El Tropicano Riverwalk Hotel**

**San Antonio, Texas**

**April 26-28, 2017**

**Wednesday, 4/26**

9:00-11:30 **“Guardianship Nuts and Bolts”** (Separate Registration Required) Kamyon Conner, MSW/TxCG/NCG and John Caldwell, JD

9:00--11:30 **Interest Group meetings** (optional and open to anyone)

A. Court investigators - Carol Dabner, JD PhD OTR NMG, Denton County Probate Court Investigator, facilitator

B. Private professional guardians -Leah Cohen, LCSW, TxCG/NCG, facilitator

9:00—11:00 **Texas Certification Exam, hosted by the JBCC**

**Lunch on your own**

**“Honoring Diversity in Guardianship”**

**1:00-1:15** **Welcome**, Terry W. Hammond, President, Texas Guardianship Association/Chair, National Guardianship Association State Affairs Committee; Clifford Walker, Past President, Center for Guardianship Certification; Hon. Kelly Cross, Bexar County Statutory Probate Court 1

**1:15—1:45** **TGA Annual meeting**

**1:45—3:30** **“Emotional Intelligence-the Framework for Great Performance in Work and Life”:** Chip Wilson, 360Solutions

Mr. Wilson is recognized internationally for his inspirational leadership training with corporations and businesses of all sizes. He also developed a Champions program in which businesses can partner with non-profits to provide training in leadership and sound business practices for sustainability.

**3:30-3:45 Break**

**3:45—5:00** “**Legislative Update”**: Steven D. Fields,JD, Court Administrator, Tarrant County Probate Court #2 and Jeff Rinard, Certification Director, Judicial Branch Certification Commission

Mr. Fields will review over 20 bills affecting guardianship introduced during the current legislative session and analyze how each bill might affect the practice of guardianship in Texas. Mr. Rinard will discuss the intent and status of bills supported by the Office of Court Administration and the likely impact of each bill.

**5:00 – 6:30 Welcome Reception**

**Dinner on your own.**

**Thursday, 4/27**

**7:00—8:00 Breakfast provided by TGA**

**8:30—10:00 Breakout sessions**

1. **“View from a Family Guardian”** Hon. Polly Spencer (Ret) Judge Spencer will share her unique experience of serving as a guardian for her adult daughter while presiding over hundreds of guardianships as a Statutory Probate Judge in Bexar County.
2. **“Managing Difficult Behavior”** Kelly Cowan, MD Dr. Cowan is a psychiatrist who is experienced with managing difficult behaviors in persons in facility settings through the use of behavioral modification as well as pharmaceutical interventions as a last resort.
3. **“Does Sally need a guardian?”** Dan Archibald and Angela Harvey JD Mr. Archibald and Ms Harvey will provide an overview of less restrictive alternatives and supports and services available for the IDD community. They will lead a discussion of using guardianship only as a last resort from a family standpoint. .

**10:00—10:30 Break**

**10:30—12:00 Breakout sessions**

1. **“Medicaid 101”** Carol Bertsch JD Ms. Bertsch has 20 plus years working as an elder law attorney. She is experienced in Medicaid planning and will provide a simple overview of a very complex issue, and how Medicaid planning can benefit persons under guardianship.
2. **“Executive Function Impairment and Incapacity”** Jason Schillerstrom, MD

Dr. Schillerstrom is a geriatric psychiatrist and Associate Professor at the University of Texas Health Sciences Center – San Antonio. He also consults with Adult Protective Services and performs forensic psychiatric evaluations of capacity. Dr. Schillerstrom will discuss behaviors resulting from impairment of executive function, and the need for courts, attorneys, guardians, and others involved in guardianship proceedings to properly obtain and utilize medical evidence of diminished mental capacity.

1. **“Cultural and Religious Diversity”:** Ted Ong, MBA, Prudent Investors Network

Mr. Ong is a nationally recognized expert on the Uniform Prudent Investor Act and has been an investment professional since 1983. He will discuss their personal experience with cultural and religious diversity in his personal and professional lives.

**12:00—1:30 Lunch on your own**

**1:30—3:00 Breakout sessions**

1. **“The Buck Stops…Where? *Parens Patriae* and the Court’s Obligation to Protect Those in Need”** Terry W. Hammond, JD, Terry W. Hammond Consulting & Steven D. Fields, JD, Court Administrator, Tarrant County Probate Court #2

Mr. Fields, who has worked in a Statutory Probate Court for two decades, and Mr. Hammond, who practiced guardianship law for over twenty years and now assists the Brazos County Courts at Law with guardianship proceedings, will discuss the responsibility of Texas judges with guardianship jurisdiction to responsibly monitor the guardianships over which they preside. They will identify and discuss frequent errors and omissions by guardians and the Courts, and techniques for the Courts to use to address deficiencies before a crisis develops.

1. **“In Consideration of Diversity and Personal Preferences: Ethical Guardianship through Psychological Consultation”** Benjamin Conforti, PhD

Dr. Conforti is a forensic psychologist who provides psychotherapy to adults, couples and children. He works from a cognitive behavior perspective and will discuss the importance of considering a person’s cultural and personal preferences and how to best comply with Texas Guardianship Standards on diversity and personal preference.

1. **“Basic Trusts 101”** Chris Hodge JD

Mr. Hodge is an attorney whose practice in San Antonio is focused primarily on Estates, Trusts and Fiduciary Litigation. This session will address when creation of a trust is beneficial in the guardianship contest, including Medicaid qualification, management trusts, and other alternative trust arrangements.

**3:00—3:30 Break**

**3:30—5:00 Breakout sessions**

1. **“Guardianship of the Estate 101”** Shawn Hughes JD , Senior Vice President, Broadway Bank

Mr. Hughes has practiced guardianship and probate law in San Antonio and is a Senior Vice President at Broadway Bank. Mr. Hughes will discuss best practices and common pitfalls in the administration of guardianships of the estate, and techniques for attorneys, guardians, and judges to use to ensure proper administration of estates in guardianship proceedings.

B. **“Creating Safe Zones: Being an LGBYQ+Ally”** Robert Salcido and Naomi Brown, MSW, Pride Center of San Antonio Mr. Salcido and Ms. Brown are facilitators for The Pride Center of San Antonio's Safe Zone Training program that offers cultural competency training for San Antonio Police Department and other area nonprofit and for-profit organizations. Both are also Education Ambassadors with SAGE's (Services and Advocacy for LGBT Elders) National Resource Center on LGBT Aging.

https://ssl.gstatic.com/ui/v1/icons/mail/images/cleardot.gif C. **“Caring for the Caregiver”** Inez Russell, MBA, TxCG, NCG, Executive Director, Friends for Life and Marylea Henderson, PhD, McClennan County College

Ms. Russell and Ms. Henderson will provide techniques for self-care which is so important for individuals responsible for the well-being of others and who work in occupations such as guardianship and social work.

**Dinner on your own**

**Friday, 4/28**

**6:45—7:45 Breakfast provided by TGA**

**8:00—9:30** **“End of Life Decisions: Balancing religion, ethics, law, and culture”**

This session will be a panel discussion led by Shawn Hughes, moderator. Panelists include Anna Torres JD, Simone Flowers, PhD and Richard Woodley, MA. Panelists will discuss real life examples of conflicts encountered around issues of medical care, death and dying, surgical treatment, hospice care, discharge planning, mental health treatments etc.

**9:30-10:15** **“Doing More Than Just Enough”:** Hon. Kelly Cross, Judge, Bexar County Probate Court 1

Judge Cross has over twenty-five years of experience as an advocate for those in need of protection, first as an attorney and now as judge for Bexar County Probate Court 1. Judge Cross will address the ethical necessity of making the relationship between the Court, the guardian, and the person whose needs are to be met therapeutic and meaningful.

**10:15—10:45 Break**

**10:45—12:00** **“A View from the Bench: Guardianship Challenges, Successes, and Needs in the Texas Court System”** This will be a panel discussion led by Terry Hammond, moderator. Hon. Amanda Matkze, Brazos County Court at Law No. 1, Hon. Charles Ellison, Robertson County Judge, and Hon. Dave Jahn, Associate Judge, Denton County Probate Court will discuss the challenges of adjudicating and administering guardianship proceedings under increasing scrutiny of diverse counties, conditions, and caseloads in Texas, ranging from rural to mid-level and highly-populated areas. The judges will provide observations on best practices in their courts and will answer questions from attendees.

**Closing remarks, Terry W. Hammond**

1:30—2:30. “So What’s Next?” Optional Meeting of Judges and Court Staff. Hon. Amanda Matzke, Steven D. Fields, and Terry W. Hammond In consideration of the Guardianship Compliance Project that has been initiated by the Office of Court Administration to audit guardianship cases in Texas guardianship courts, TGA has issued a special invitation to judges with guardianship jurisdiction and their staffs to attend the 2017 Conference. This meeting will allow TGA leadership to interact with judges and court staff interested in collaborating to develop education and training opportunities for Texas courts as adjudication and administration of guardianships comes under increased and sustained public and legislative scrutiny.