

MINUTES OF THE CONSERVATOR GUIDELINES

COMMITTEE MEETING

February 3, 2017

The meeting of the Conservator Guidelines Committee (the "Committee") was held on Friday, February 3, 2017, commencing at 9:00 a.m. at the Office of the Probate Court Administration, 186 Newington Road, West Hartford, Connecticut 06110.

Present at the meeting were: Paul Knierim, Thomas Gaffey, Mark DeGennaro, Chair, Kelley J. Clairmont, Diane Blick, Andrea Truppa, Monica Gonzalez, Keeley Phipps, Patricia Savizno, Beverly K Strait-Kefalus, Cathryn-Jean Fleming, Sydney Elkin.

Judge DeGennaro call the meeting to Order and the Minutes of the Conservator Guidelines Committee Meeting of November 18, 2016 were approved.

Judge DeGennaro opened up the meeting by discussion of the CO-17 and issues with time keeping. We discussed alternatives, budgets and possibly billing once monthly against the individual's budget. We also discussed billing in connection with a spend down, especially if an individual is over asset.

Review and approval of the CO-17 continue to be time consuming for the Courts and we discussed if that process can be simplified.

We spoke about helpful information, in terms of Best Practices and frequently asked questions, that are available on the web site for all parties involved with conservatorships.

During the first six months of the contract conservator program, the contract conservators have taken on 500 additional cases. Probate administration is continuing to monitor this program carefully and will review results after the first year of implementation. The contract conservators have provided helpful feedback to Probate Administration in terms of how they feel the Court's can reduce administrative work, such as streamlining accountings, which will reduce costs.

Education remains an important part of this Committee's goals for Conservators. An application for a grant was submitted to the State Justice Institute to fund the on-line self study for Conservators. An answer is anticipated the beginning of April, 2017. There is an interdisciplinary group working on the development of the topics for the programs.

In terms of Legislation, Probate Administration has two different bills being offered concerning Conservatorship. One bill is concerning audits of conservator accounts – this would be a random auditing of an active account. The idea is to strengthen the oversight to make sure there is accuracy consistent with the accountings submitted to Probate Court.

The other proposed legislation is an act reducing the cost of conservatorship. It has three elements. The first element is that it seeks to amend the state Medicaid plan to deduct a conservator fee from the applied income for individuals who are on Title XIX, conserved and in a long term care facility. The second element is that fees paid via a CO-17 can be recovered if an individual recovers monies such as by inheritance, winning of the lottery or settlement of a legal claim. The final element is the ability of a Conservator to receive approval from Probate Court to lien real property in order to cover conservator fees and anticipated fees/costs.

We discussed a motion to adopt the National Guardian Association guidelines as Connecticut Best Practices.

Our next meeting is planned for May 5, 2017 at 9:00 a.m.

Respectfully submitted,

A handwritten signature in dark ink, appearing to read 'CJ Fleming', written over a horizontal line.

Cathryn-Jean Fleming