

FSGA BULLETIN



Holly Thomas, Jody Leslie, Carlos McDonald, Diana Shields, Cindy Kramer, Gina Rossi, Bambi Nikolakis-Williams, Melyin Hadid

FSGA WORKING FOR YOU IN TALLAHASSEE

The official commencement of the regular Florida Legislative Session this year is March 7th. But for all intents and purposes it has already begun with many committee meetings taking place over the recent weeks. FSGA has been very involved and present there in Tallahassee in full force. Starting with meetings going back to October that included Elder Affairs Secretary Michelle Brahman and OPG, and again just a couple weeks ago in January.

Fourteen FSGA members made the trek to Tally with 6 from the Broward Chapter alone. This concerted effort concluded with a well-attended reception hosted by the Big Bend Chapter. *Way to go Broward and Big Bend Chapters!* We held over 30 pre-scheduled meetings during two very busy days beginning as of 8:30 in the morning. These included a special meeting with Senate President Kathleen Passidomo as well as with several legislators in leadership positions and chairs of committees. Secretary Branham with her chief Elder Affairs staff attended the reception afterward.

By any measure it was a great success. It's so important that our policy makers meet in person with FSGA members and get to know us first-hand, to also get to know possibly even for the first-time about the guardianship legal process, and certainly to know that FSGA stands 100% for education, training, and best practices across the board. With everyone's support and participation, these efforts will ideally be maintained going forward.

Many thanks to (in alphabetical order) — Joseph Bensmihen, Jetta Getty, Melyin Hadad, Becky Holt, Cindy Kramer, Jody Leslie, Carlos McDonald, Lance McKinney, Bambi Nikolakis-Williams, Gail Rapp, Gina Rossi-Scheiman, Diana Shields, Richard Stark, Holly Thomas, and Pam Wiener.



THE 2023 LEGISLATIVE SESSION

FEBRUARY UPDATE ON LEGISLATION OF INTEREST:

SB 232 and HB 603 — Exploitation of Vulnerable Persons

The legislation if enacted would in part expand definitions for fraudulent practices currently in statute and specific if person is 65 years or older. For instance, it creates definitions for “Intimidation”, “Bribe”, and “Kickback” in relation to a person 65 or older. And in particular would provide that these cases can be advanced for trial dependent on the person’s age and health.

→ **Sponsors are Senator Ileana Garcia and Representative Chip LaMarca.**

→ **FSGA is already firmly on record in support.**

SB 1098 and HB 1119 - Withholding or Withdrawal of Life-prolonging Procedures

This revisits the procedures hastily enacted in 2020 requiring in all instances court orders before consenting to DNRs. For example, it would allow consenting without court approval if 3 specific conditions are applicable simultaneously – two doctors concur, no known objections, and an ethics committee concurs.

→ **Sponsors are Senator Colleen Burton and Representative Kimberly Berfield.**

→ **FSGA is in support.**

FSGA will continue to monitor for our members issues of interest. **Additionally, full details will be provided to all those attending our July Conference in Orlando!**



Carlos Mc Donald, Pam Wiener, Joseph Bensmihen (JB) Senator John Snyder, Gina Rossi, Diana Shields



Carlos Mc Donald, Pam Wiener, Richard Stark, Bambi Nikolakis- Williams, Holly Thomas, Shanna Butcher, Nikki Decker seated Cindy Kramer



Melyin Hadid, Senator Shevrin Jones, Cindy Kramer, Bambi Nikolakis- Williams



Joseph Bensmihen (JB) DOEA Secretary Michelle Branham, Carlos Mc Donald

SAVE THE DATE



FSGA 36TH Annual Conference

Rosen Plaza Orlando July 20th & 21st, 2023

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RENEW YOUR MEMBERSHIP TODAY!

Your participation is important and helps demonstrate our shared commitment to excellence in guardianship.

If not an FSGA member already, we certainly welcome you! FSGA has been a leader since 1983 working for the betterment of the practice of guardianship.

It would be terrific if you renewed your membership, or joined, today!

MEMBER BENEFITS AND MORE ENHANCEMENTS FOR 2023 INCLUDE:

- ✓ **Free & Discounted Continuing Education**
 - CEU's available for multiple disciplines
 - Various webinars during the year
 - Exclusive early access to registration
- ✓ **Discounts to Annual Ethics Symposium and Annual Conference**
 - Hundreds of professionals attend and participate
- ✓ **Publications, Newsletters & Insights**
 - Receive FSGA bulletins and guardianship news
- ✓ **Access to a new exclusive online Listserv**
 - This will be a valued and helpful peer community
- ✓ **Networking and advertising opportunities**
 - Membership directory
 - Network with professionals in local chapters, events, entries on FSGA website
- ✓ **Legislative Advocacy & Communications**
 - Needed now more than ever
 - Engaging with policy-makers and media
 - Receive important information

Your involvement is welcomed and much needed! Please renew/ join at your earliest!

VISIT US ONLINE www.floridaguardians.com

ORCHESTRATING CHANGE

FSGA 36TH Annual Conference
Rosen Plaza Orlando July 20th & 21st, 2023



REGISTER NOW!

Registration is now OPEN with discounts for early birds! Our two-day program will make 10 CEU's available in the areas of Guardianship, Florida Board of Nursing, Nursing Home Administrators, Clinical Social workers, Marriage and Family Therapy and Mental Health Counselors. CLE will also be available for attorneys.

ORCHESTRATING CHANGE
FSGA 36TH Annual Conference, July 20th - 21st 2023
Rosen Plaza Hotel 9700 International Drive Orlando, Florida

FSGA
Florida State Guardianship Association

FSGA Conference for Florida Guardians and Professionals!

FSGA presents its 36th Annual Conference with another terrific lineup of presenters being assembled that includes General Magistrate **Sean Cadigan** with the Thirteenth Judicial Circuit based in Tampa, recently appointed State Ombudsman **Terri Cantrell** with the Dept. of Elder Affairs, and Florida Senate President **Kathleen Passidomo**! Also expected are the Secretary of the Dept. of Elder Affairs **Michelle Branham**, and the recently appointed directors for the Agency for Persons with Disabilities (APD) and the Agency for Health Care Administration (AHCA) to name a few. Additionally, a special discussion with Disability Rights Florida on subjects ranging from supported-decision making to Social Security auditing.

Registration is **NOW OPEN** with discounts for early birds! Our two-day program will make 10 CEU's available in the areas of Guardianship, Florida Board of Nursing, Nursing Home Administrators, Clinical Social workers, Marriage and Family Therapy and Mental Health Counselors. CLE will also be available for attorneys.

Begins Thursday July 20th @8AM
Includes Thursday evening Speakers Reception
Concludes Friday July 21st @3:30PM

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Kathleen Passidomo
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State Ombudsman

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Expert Tip: Use Check Lists

Ever gone to the store for bread and come home with two bags of groceries and no bread? This happens more times than we like to admit. In our busy lives, we are often distracted. That's the beauty of a checklist! By definition, "a checklist is a type of informational job aid used to reduce failure by compensating for potential limits of human memory and attention. It helps to ensure consistency and completeness in carrying out a task." So, if a checklist can ensure that we come home from the store with a loaf of bread, how can we apply the same idea to the business of guardianship?

We talk a lot about best practices in Guardianship, but without a tool to help put those practices into play—consistently—we are subject to the limits of memory and attention. Using software with a checklist feature

overcomes those shortcomings by providing the framework to create a work flow process and track activity progress. SEM Applications Guardianship Software provides customizable checklist options that display activity due dates on the calendar and provide reports to list outstanding items.

A good Checklist doesn't need to be elaborate; it needs to be duplicable. Create checklists for accountability in court required activities, to establish a progression for assigned tasks, and as a way to define company procedures. Check List items should be meaningful activities and actions or items that are critical to success. A checklist that is too long or complex to comfortably manage or one that includes items that are only rarely necessary will be frustrating to update and maintain. Conversely, a checklist that is vague or overly generalized may not provide enough direction to be helpful.

Start with one set of vital tasks or focus on a process that has court required activities or tasks that could be easily missed or forgotten. Order the tasks by priority and then refine the list to contain only items critical to success. For example, a New Client Checklist would only need to include a task to "Close existing bank accounts" rather than multiple tasks to "Close Checking account" and "Close Savings account". A task to "Marshall all assets" might prove to be too general. It might be wiser to include options for specific types of assets (i.e. cash assets, real estate, etc.).

With customization options, you can make course corrections as you go until you have a Checklist that fits your needs perfectly!

Interested in other expert tips? Visit www.sem97.com or call 660-446-3031 to learn more about the features of our guardianship software.