

**REPORT TO THE
GENERAL ASSEMBLY OF VIRGINIA**

**VIRGINIA PUBLIC GUARDIAN AND
CONSERVATOR PROGRAM**



**BIENNIAL REPORT OF
THE VIRGINIA DEPARTMENT FOR AGING AND
REHABILITATIVE SERVICES
COMMONWEALTH OF VIRGINIA
2018**



COMMONWEALTH of VIRGINIA
Department for Aging and Rehabilitative Services
James Rothrock, Commissioner

January 1, 2018

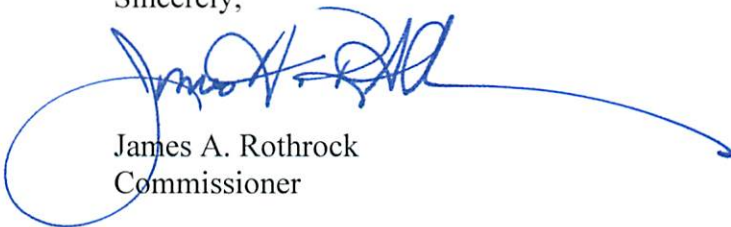
Members of the General Assembly
General Assembly Building
910 Capitol Square
Richmond, Virginia 23219

Members of the General Assembly:

Pursuant to Virginia Code § 51.5-150, this report on the status of the Virginia Public Guardian and Conservator Program is presented. The document includes statistical data on the number and type of vulnerable adults served by the program, program history, and emerging issues related to program expansion.

If you need any additional information, please contact Patti Meire, Esq., Public Guardian Program Coordinator, by email at patti.meire@dars.virginia.gov or by telephone at 804-588-3989.

Sincerely,

A handwritten signature in blue ink, appearing to read "James A. Rothrock", with a large, sweeping flourish extending to the right.

James A. Rothrock
Commissioner

TABLE OF CONTENTS

Section		Page Number
I	THE PUBLIC GUARDIAN AND CONSERVATOR PROGRAM Program Overview	1
II	FISCAL YEARS 2017 AND 2018 PROGRAM EXPANSION Fiscal Year 2017, Fiscal Year 2017 Expansion Challenges, Fiscal Year 2018	3
III	PARTNERSHIP WITH DBHDS	8
IV	REGULATORY CHANGES FOR PERSON-CENTERED PRACTICES	8
V	THE CHALLENGE OF CIRCUIT COURT PETITIONING COSTS IN CASES WITH INDIGENT RESPONDENT	9
VI	THE VIRGINIA PUBLIC GUARDIAN AND CONSERVATOR ADVISORY BOARD Accomplishments of the Board, Recommendations of the Board	10
VII	STRATEGIC PLANNING AND PARTNERING Upcoming Retirements and Succession Planning, Partnerships and Pro-Active Education (2016-2018 Focus)	12
Appendix A	REGULATIONS FOR THE VIRGINIA PUBLIC GUARDIAN AND CONSERVATOR PROGRAM 22 VIRGINIA ADMINISTRATIVE CODE § 30-70-10 <i>et seq.</i>	A(i)
Appendix B	CONTRACTED SLOTS PROVIDED TO LOCAL PUBLIC GUARDIAN SERVICE PROVIDERS	B(i)
Appendix C	VIRGINIA PUBLIC GUARDIAN PROGRAM – LOCAL PROVIDER GEOGRAPHIC SERVICE AREAS AND STATEWIDE MAP	C(i)

EXECUTIVE SUMMARY

The Virginia Public Guardian and Conservator Program (Program), operated within the Department for Aging and Rehabilitative Services (DARS), provides guardian and conservator services for adults who are incapacitated and indigent and for whom no other proper or suitable person can be identified who is willing and able to serve as the individual's guardian, or conservator, or both, as applicable.

Program Expansion – Fiscal Years 2017 and 2018

The 2016 General Assembly increased funding to DARS by \$850,000 in Fiscal Year (FY) 2017 to increase the number of public guardianship clients served through the Program by 150 client slots and appropriated in FY 2018 an additional \$1,061,000 for 193 new client slots. As a result of these two increases, the Program now can serve 1,049 individuals. In FY 2017, unexpected delays were experienced in bringing the 150 new clients into the Program. These delays resulted primarily from difficulties encountered in bringing the legal proceedings necessary for the establishment of the guardianships to court. Steps have been taken to reduce these delays in FY 2018.

Partnership with DBHDS

Since 2007, DARS, working collaboratively with the Department for Behavioral Health and Developmental Services (DBHDS) and with funding provided by the General Assembly, has added significant capacity to the Program. This collaboration has enabled the Program to assist in the transition of many vulnerable adults residing in state-operated training centers and state hospitals to the community.

Regulatory Changes for Person-Centered Practices

Final regulations became effective October 19, 2016 amending 22 Virginia Administrative Code § 30-70-30 to require public guardianship providers to use person-centered planning practices.

The Challenge of Circuit Court Petitioning Costs in Cases with an Indigent Respondent

A major hurdle for individuals in need of public guardianship is the need to identify a petitioner willing to hire an attorney or find a pro bono attorney to file for and obtain the order of guardianship for an allegedly incapacitated respondent. DARS believes it would be beneficial to serve as a petitioner of last resort if no other petitioner can be identified. The Office of the Attorney General has declined to undertake any such representation on behalf of DARS unless legislation is adopted clarifying that DARS may serve as petitioner. DARS recommends that Virginia Code § 51.5-150 be amended to allow DARS to serve as petitioner in cases in which a public guardian appears to be appropriate, provided no other proper and suitable person can be identified who is willing and able to serve as petitioner.

The Virginia Public Guardian and Conservator Advisory Board (VPGCAB)

The Advisory Board continues to serve as a valuable technical resource and advisor for the Program. The Virginia Code requires DARS to contract with a research entity every four years to evaluate the Program and to identify trends and make recommendations, provided funds are appropriated by the General Assembly for such purpose. The last report was prepared in 2007. The VPGCAB recommends that \$30,000 be appropriated by the General Assembly to fund the statutorily mandated evaluation in FY19.

SECTION I: THE PUBLIC GUARDIAN AND CONSERVATOR PROGRAM

The Virginia Public Guardian and Conservator Program (Program), operated within the Virginia Department for Aging and Rehabilitative Services (DARS) under Virginia Code §§ 51.5-149 *et seq.* provides guardian and conservator services for adults who are:

- indigent;
- incapacitated; and
- have no other proper and suitable person willing and able to serve as a guardian, or as a conservator, or as both.

This biennial report on the status of the Program is provided to the Virginia General Assembly as required by Virginia Code § 51.5-150.

For ease of reference, throughout the remainder of this report the term “guardian” will be used in lieu of the phrase “guardian, or conservator, or both” and the services provided by the Program will be referred to as “guardianship services.”

Program Overview

Historically, a locality’s sheriff served as the guardian of last resort, but now a public guardian can be appointed by a Virginia circuit court. Once appointed, the public guardian usually serves for the life of the person whom the circuit court has found to be incapacitated.

DARS administers the Program through a competitively negotiated contract process with 13 local providers. These local providers maintain 24-hour, 365-days-a-year coverage for the clients they serve. High quality service is maintained through regulations and contract provisions requiring that:

- The ratio of any provider’s public guardianship clients to full-time direct service staff not exceed 20:1 (22 Va. Admin. Code § 30-70-30, *see* Appendix A);
- Each client receives a monthly face-to-face visit;
- Each provider has a multi-disciplinary panel (MDP) consisting of professionals from the geographic region served by the provider who are knowledgeable about human service needs in that geographic area and may include representatives from the local departments of social services, community services boards (CSBs), area agencies on aging, and health departments and licensed attorneys, physicians, and administrators of local hospitals, nursing homes, assisted living facilities, and group homes (22 Va. Admin. Code § 30-70-30);
- Person-centered planning be utilized to ensure that decisions made on behalf of clients are as individualized as possible (22 Va. Admin. Code § 30-70-30);
- Providers report to DARS quarterly regarding the number of clients served;
- DARS conduct periodic on-site monitoring of local providers (22 Va. Admin. Code § 30-70-60); and
- The program director for each provider attend a DARS-sponsored annual training which is also opened to direct service personnel (22 Va. Admin. Code § 30-70-40).

Additionally, each client's case is reviewed annually to consider whether public guardianship continues to be appropriate (22 Va. Admin. Code § 30-70-30).

From modest beginnings in 1998 with three public guardianship providers serving 93 vulnerable adults through contracts with the Virginia Department for the Aging, the Program has grown in capacity with funding appropriated in the 2016 legislative session allowing for 150 new client slots in Fiscal Year (FY) 2017 and 193 new clients slots in FY 2018; together, a 49 percent increase over the 706 client slots available in FY 2016. As a result of these increases, 1,049 of the Commonwealth's most vulnerable adults now are able to receive public guardianship services.

Eleven of the 13 local providers are organizations that offer more comprehensive social services in the localities they serve. These are Alleghany Highlands Community Services Board, Appalachian Agency for Senior Citizens, The ARC of Northern Virginia, Catholic Charities of Eastern Virginia, Commonwealth Catholic Charities, District Three Senior Services, Family Services of Roanoke Valley, Jewish Family Services of Richmond, Jewish Family Services of Tidewater, Mountain Empire Older Citizens, and Senior Connections-Capital Area Agency on Aging. Two of the 13 local guardianship providers, Autumn Valley Guardianship and Bridges Senior Care Solutions, are stand-alone guardianship programs.

Client slots are divided among four eligibility categories that correspond to the four funding allocations made by the 2016 General Assembly for the Program. These are:

- DBHDS-ID/DD – For adults identified for public guardianship services by the Virginia Department of Behavioral Health and Developmental Services (DBHDS) who have an intellectual or other developmental disability;
- DBHDS-MI – For adults identified for public guardianship services by DBHDS who have a mental illness. To date, these slots have been used exclusively for individuals being treated at state hospitals;
- MI/ID – For adults with either mental illness or an intellectual disability, including individuals who have been identified for public guardianship by a source other than DBHDS; and
- Unrestricted – For adults who meet the statutory criteria for public guardianship regardless of the diagnosis or circumstances underlying their incapacity or the referral source. For example, individuals incapacitated by dementia or an acquired brain injury resulting from an accident or a stroke would be assigned to an unrestricted slot.

Appendix B lists the number of contracted slots provided to each local public guardianship provider for each eligibility category.

Local public guardianship providers serve specific geographic service areas. Referrals are made to the local provider that serves the geographic area where the allegedly incapacitated person

resides at the time of the initial referral. Bridges Senior Care Solutions, District Three Senior Services, and Jewish Family Services of Tidewater serve as regional programs and will accept clients who at the time of the referral reside outside of the program's traditional geographic service area. As a practical matter, all of the local public guardianship providers sometimes must serve clients who reside outside of their geographic service area because of residential placement changes that are beneficial to the client but place the client outside of the guardian's service area. Appendix C describes the geographic area served by each local public guardianship provider.

Before any local guardianship provider can accept an individual for guardianship services 22 Va. Admin. Code § 30-70-30 requires that the provider's MDP must review the referral to determine whether the individual is an appropriate candidate for that provider's program.

Specifically, the MDP must review the referral to ensure that:

- the individual cannot adequately care for himself;
- the individual is indigent;
- there is no alternative less restrictive than guardianship to meet the individual's needs;
- the needs of the client are consistent with the priorities of the public guardian program; and
- there is no other proper or suitable entity who is willing and able to serve as the guardian.

SECTION II: FISCAL YEARS 2017 AND 2018 PROGRAM EXPANSION

Fiscal Year 2017

The 2016 session of the General Assembly appropriated \$850,000 of additional funds to create 150 new client slots in FY 2017 for individuals identified for public guardianship services by DBHDS. One hundred of these new client slots were DBHDS-ID/DD slots. The remaining 50 were DBHDS-MI slots. These new client slots resulted in a 21 percent increase in Program capacity from 706 to 856 client slots: 407 Unrestricted slots; 359 DBHDS-ID/DD slots; 50 DBHDS-MI slots; and 40 MI/ID slots.

At the end of FY 2017 the Program was 98 percent full, with 754 active clients having a court order in place naming a local public guardianship provider as their guardian and 85 in-process clients having a reserved slot with a local guardianship provider but for whom a court order naming the guardian had not yet been entered. The youngest client was 18 years old and the oldest 98 years old. The table below illustrates the age distribution of clients (active and in-process, collectively) at the end of Fiscal Year 2017 for both the Program as a whole and for each of the eligibility categories.

AGE DISTRIBUTION – PUBLIC GUARDIAN PROGRAM CLIENTS (As of 6/30/17)			
Eligibility Category	Age Group	Age Range	Percentage
Public Guardian and Conservator Program (839 Clients)	Young Adult	18 – 29	9.32%
	Middle Aged	30 – 59	44.32%
	Older Adult	≥60	46.36%
	Total		100.00%
Unrestricted Clients (400 Clients)	Young Adult	18 – 29	8.75%
	Middle Aged	30 – 59	35.50%
	Older Adult	≥60	55.75%
	Total		100.00%
DBHDS-ID (350 Clients)	Young Adult	18 – 29	10.92%
	Middle Aged	30 – 59	54.31%
	Older Adult	≥60	34.77%
	Total		100.00%
DBHDS-MI (49 Clients)	Young Adult	18 – 29	6.12%
	Middle Aged	30 – 59	40.82%
	Older Adult	≥60	53.06%
	Total		100.00%
MI/ID (40 Clients)	Young Adult	18 – 29	5.00%
	Middle Aged	30 – 59	50.00%
	Older Adult	≥60	45.00%
	Total		100.00%

Data Source: 4th Quarter Reports – Public Guardianship Providers (FY 2017)

At the end of FY 2017, 754 active public guardian clients lived in the following situations:

- 47.35 percent in group homes;
- 17.37 percent in nursing homes;
- 14.46 percent in sponsored residential homes;
- 10.61 percent in assisted living facilities;
- 5.04 percent in state hospitals;
- <1 percent in training centers; and
- 4.24 percent in other community settings.

The following table describes the distribution of active clients as of June 30, 2017 by housing type among the eligibility categories.

HOUSING TYPE – PUBLIC GUARDIAN PROGRAM CLIENTS (As of 6/30/17)		
Eligibility Category	Housing Type	Percentage of Active Clients
Unrestricted Clients (376 Active Clients)	Assisted Living Facility	18.93%
	Group Home	22.40%
	Nursing Home	33.60%
	Sponsored Placement	14.13%
	State Hospital	3.47%
	Training Center	<1%
	Other	6.66%
DBHDS-ID (305 Active Clients)	Assisted Living Facility	1.31%
	Group Home	77.12%
	Nursing Home	<1%
	Sponsored Placement	17.65%
	State Hospital	<1%
	Training Center	1.31%
	Other	1.63%
DBHDS-MI (34 Active Clients)	Assisted Living Facility	11.76%
	Group Home	11.76%
	Nursing Home	5.88%
	Sponsored Placement	0.00%
	State Hospital	70.60%
	Training Center	0.00%
	Other	0.00%
MI/ID (39 Active Clients)	Assisted Living Facility	2.56%
	Group Home	84.62%
	Nursing Home	2.56%
	Sponsored Placement	5.13%
	State Hospital	0.00%
	Training Center	0.00%
	Other	5.13%

Data Source: 4th Quarter Reports – Public Guardianship Providers (FY 2017)

In addition to funding additional Program slots, the 2016 General Assembly provided funding for additional staff for DARS to meet the expanded administrative needs of the Program. DARS now has two full-time staff assigned to the Program, a program coordinator and a program specialist.

Fiscal Year 2017 Expansion Challenges

For a person to receive the protection of a guardian in Virginia, a proceeding must be initiated in a Virginia circuit court pursuant to Virginia Code § 64.2-2000 *et seq.* The court must (i) determine that the respondent is incapacitated, and (ii) appoint the guardian. If the respondent

meets the statutory criteria set forth in §64.2-2010 and a local or regional public guardianship provider has an opening in its program, the court may appoint a public provider contracted through DARS to serve as the respondent’s guardian.

Completion of the legal proceedings needed to have a public guardian named for individuals referred to the Program during the FY 2017 expansion has been challenging. The Memorandum of Agreement between DARS and DBHDS for Public Guardian and Conservator Services (MOA 17-016) places the responsibility for completion of the guardianship legal proceedings on DBHDS, providing that DBHDS will ensure that state hospitals, CSBs or other appropriate entities take the necessary action to petition the appropriate circuit court and arrange for all legal services and fees. DBHDS passed this responsibility to CSBs, determining that the CSB that recommended the individual to DBHDS for guardianship services or, in the case of individuals being discharged from state hospitals, the CSB serving the area where the individual lived prior to admission to the state facility, would serve as the petitioner. DBHDS was able to provide some funding to reimburse CSBs for the attorneys’ fees incurred in the cases filed for DBHDS-ID/DD clients. DBHDS provided Discharge Assistance Program (DAP) funding to reimburse CSBs for the attorneys’ fees incurred in the cases for DBHDS-MI clients. DBHDS records show that 24 CSBs were involved in hiring attorneys in FY 2017.

The table below summarizes the status of court proceedings as of June 30, 2017 for all DBHDS-ID/DD and DBHDS-MI referrals made during Fiscal Year 2017.

COURT PROCEEDINGS OVERVIEW – DBHDS FY 2017 REFERRALS (As of June 30, 2017)		
	DBHDS-ID/DD Referrals	DBHDS-MI Referrals
Number of FY17 Referrals ¹	134	70
FY17 Referrals Withdrawn	28	21
FY17 Referrals that Received a Guardianship Order in FY17	61	34
Orders issued in < 3 months of Program acceptance	7	4
Orders issued ≥ 3 and < 6 months of Program acceptance	19	11
Orders issued ≥ 6 and < 9 months of Program acceptance	29	12
Orders issued ≥ 9 and < 12 months of Program acceptance	6	7
FY17 Referrals In Need of a Court Order as of June 30, 2017 (Pending Referrals)	45	15

Data Source: 4th Quarter Reports – Public Guardianship Providers (FY 2017) and DBHDS records maintained for DBHDS-ID/DD referrals.

At the close of FY 2017, the legal proceedings needed to establish the guardianship for 45 of the individuals referred for a DBHDS-ID/DD slot had not been completed. Thirty of these

¹ More than 100 DBHDS-ID/DD and 50 DBDHS-MH referrals were required in FY 2017 because alternatives to public guardianship were found for some individuals referred for a DBHDS FY 2017 expansion slot before the court order of guardianship was entered. Additionally, in the case of DBHDS-ID/DD referrals, some were made to fill openings resulting from deaths among DBHDS-ID/DD guardianship clients who had received a DBHDS-ID/DD guardianship slot prior to the FY 2017 expansion.

individuals had been referred to a local public guardianship provider during calendar year 2016. Twenty-two had been assigned on July 1, 2016 and had been waiting over a year for the matter to come to court. Of the 61 DBHDS-ID/DD referrals that received a court order before June 30, 2017, the average length of time from referral of the individual to a local public guardianship provider to the date of the issuance of the court order was six months.

With respect to the DBHDS-MI slots, at the close of FY 2017, 15 of the 49 active referrals were still waiting for a court hearing. Nine of these individuals had been referred to a local public guardianship provider during calendar year 2016. Six individuals had been assigned on July 1, 2016 and had been waiting over a year for the matter to come to court. Of the 34 DBHDS-MI referrals that received a court order before June 30, 2017, the average length of time from referral of the individual to a local public guardianship provider to the date of the issuance of the court order was six months.

Fiscal Year 2018

The Program expanded again in FY 2018. In the 2016 session, the General Assembly appropriated an additional \$1,061,000 for 193 new client slots, a 23 percent increase in the number of slots available over the 856 available in FY 2017. Ninety-five of these slots were designated by the General Assembly as DBHDS-ID/DD slots, 48 were designated as DBHDS-MI slots, and 50 were designated as Unrestricted slots resulting in a total of 454 DBHDS-ID/DD slots, 98 DBHDS-MI slots, 457 Unrestricted slots, and 40 MI/ID slots. As of November 10, 2017, 149 individuals had been identified for the 193 FY 2018 expansion slots: 77 for DBHDS-ID/DD slots, 26 for DBHDS-MI slots, and 46 for Unrestricted slots.

To address the delays experienced in bringing public guardianship cases to court in FY 2017, DARS requested that the Office of the Attorney General (OAG) facilitate the implementation of FY 2018 program expansion by representing DARS as petitioner in the 193 legal proceedings needed to implement the expansion. As a state agency DARS must be represented in all legal proceedings by the OAG (Virginia Code § 2.2-507). DARS recommended that a centralized process be created to more efficiently manage the legal proceedings and to ensure that everyone identified as needing a public guardian would have a petitioner available to bring their matter to court. The OAG declined to undertake this representation citing concerns that (i) DARS does not have sufficient nexus to the potential respondents and (ii) DARS serving as petitioner in such cases would create a conflict of interest. See Section V below for further discussion of these issues.

Consequently, the legal proceedings required to implement public guardianship for the 193 new clients will be undertaken by the CSBs in the case of the DBHDS-ID/DD and DBHDS-MI clients. In the case of Unrestricted clients, the court cases will be filed by the person or entity that referred the individual for public guardianship services, assuming such person or entity is willing to undertake that role. To assist with the process, DBHDS has increased the funding available to reimburse CSBs for hiring attorneys to represent the CSBs in court cases related to filing DBHDS-ID/DD slots to \$300,000, plus additional funding as needed for DBHDS-MI referrals from DAP. DARS has allocated \$176,834 to assist petitioners bringing cases to have

individuals placed into Unrestricted slots with the expense of attorneys' fees.² It is anticipated that this additional funding and improved processes and experience will reduce the amount of time required to have public guardianships established for individuals referred to the Program in FY 2018.

SECTION III: PARTNERSHIP WITH DBHDS

Beginning in Fiscal Years 2007 and 2009, the General Assembly invested significant resources through DBHDS to provide guardianship services to individuals residing in or at risk of placement in state training centers. The funding increase provided to DARS in the 2016 session of the General Assembly again was targeted toward increasing the number of guardianship slots for DBHDS-referred individuals incapacitated by an intellectual disability or mental illness. DARS and DBHDS, working collaboratively, have added significant capacity to the Program by authorizing additional client slots for at-risk adults. Currently, funding for DBHDS-referred clients accounts for approximately 59 percent of the Program budget. Fifty-three percent of public guardianship slots (552 slots) are reserved for individuals referred to the Program through DBHDS. Since Fiscal Year 2007, the Program has successfully enabled the transition of many vulnerable adults residing in state-operated training centers and state hospitals to the community. This successful outcome was accomplished by using a coordinated team process with the collaboration of many individuals from the public and private sectors, including CSB case managers, public guardian service providers, training center staff, DBHDS social workers and discharge planners at state hospitals, and others.

SECTION IV: REGULATORY CHANGES FOR PERSON-CENTERED PRACTICES

DARS directs its local public guardianship providers to use person-centered planning through recent regulatory changes to 22 Va. Admin. Code § 30-70-30. The 2011 General Assembly passed Senate Joint Resolution 397 requesting the Secretary of Health and Human Resources and human services agencies to adopt and implement person-centered practices in providing services to citizens. This resolution noted that every individual is unique and no two individuals have the same preferences and needs. Person-centered planning supports individuals in making choices and decisions about the services that best meet their preferences and needs.

The final regulations took effect on October 19, 2016. They require person-centered planning that focuses on the expressed preferences, personal values, and needs of the individual receiving public guardianship services and empowers and supports the individual to the extent feasible in defining the direction for his or her life. The regulations require that, when decisions need to be made on behalf of a client, the guardian as the decision-maker utilizes the following person-centered planning tools to the maximum extent feasible:

- inclusion of people chosen by the individual in the decision-making process;

² DARS entered into 10-month contracts with the local guardianship providers for the client slots provided as part of the FY2018 program expansion which were effective as of September 1, 2017, making \$176,834 available to assist with reimbursing petitioners for their attorneys' fees.

- provision of necessary information and support to enable the individual to direct the process and make informed choices and decisions;
- timely decision-making and planning that occurs at times and locations convenient for the individual;
- awareness of the individual's cultural values;
- provision of choices to the individual regarding the services received and by whom the services are provided; and
- completion of documentation of the processes employed and the outcome of person-centered planning.

SECTION V: THE CHALLENGE OF CIRCUIT COURT PETITIONING COSTS IN CASES WITH AN INDIGENT RESPONDENT

A major hurdle for individuals in need of a public guardian -- people who are by definition indigent and without friend or family -- is the need to identify a petitioner who is willing to hire an attorney or find a pro bono attorney to file for and obtain the order of guardianship. Individuals in need of public guardianship services historically have been referred to the Program by DBHDS, law enforcement, local CSBs, local departments of social services, hospitals, nursing homes, and assisted living facilities. In cases in which DBHDS was seeking to discharge large numbers of individuals from state-operated training centers in response to the Department of Justice (DOJ) Settlement Agreement, DBHDS served as the petitioner and was represented by the OAG. Hospitals also often have been willing to act as petitioner for the individuals they have referred for public guardianship. CSBs, local departments of social services, nursing homes, and assisted living facilities sometimes have not initiated guardianship proceedings for clients believed to be incapacitated because of their unwillingness or inability to hire counsel to bring the matter to court. DBHDS and DARS have made funding available to reimburse petitioners seeking to have a public guardian put in place for an incapacitated individual in FY 2018, but after that the problem of identifying petitioners willing to take on the expense of hiring an attorney to initiate a legal proceeding to have an indigent incapacitated person receive the protection of public guardianship is likely to reappear. Fifty public guardian slots opened in FY 2017 as a result of deaths of existing clients. As the Program expands, it is likely that the number of slots that will become available each year to fill vacancies will continue to increase with no clear path for bringing the cases of potential new clients to court.

Virginia Code § 64.2-2002 provides that any person may petition for the appointment of a guardian for another individual. DARS believes it would be beneficial to serve as a petitioner of last resort to facilitate the guardianship process and ensure that vulnerable, incapacitated adults are getting the protection envisioned by the General Assembly when no other person or entity is willing to serve as the petitioner. For referrals made by those local departments of social services and CSBs that have access to attorneys and funding for attorneys' fees, and referrals made by hospitals, which have a strong financial incentive to initiate guardianship proceedings, DARS need not serve as petitioner. In those cases in which a petitioner cannot be identified for an individual referred for public guardianship, DARS believes that it would be beneficial to be allowed to serve as petitioner.

DARS has considered whether undertaking the role of petitioner presents a conflict of interest or would bring harm to the individuals the Program was created to serve. DARS is of the opinion that there would be no conflict of interest or harm to individuals for the following reasons.

- DARS would not be placing the individual in the Program, rather it would be asking a circuit court to determine (i) that the respondent is an “incapacitated person” as defined by Virginia Code § 64.2-2000, and (ii) if so, that the statutory criteria for public guardianship or conservatorship set forth in § 64.2-2010 of the Virginia Code have been met. Only if (i) and (ii) are satisfied would DARS ask that a public guardianship provider be named as guardian.
- The Virginia Code provides substantial protections to respondents in guardianship proceedings. These individuals are provided with a guardian *ad litem* who makes a recommendation to the court as to what determination is in the respondent’s best interest (Virginia Code § 64.2-2003). The respondent may request a second attorney be provided to represent his or her wishes, as opposed to his or her best interest (Virginia Code § 64.2-2006). The respondent may request a jury trial (Virginia Code § 64.2-2007). Additionally, the petitioner is required to name family members, if any are known, in the petition to give those who are most familiar with the respondent an opportunity to intervene in the proceeding (Virginia Code § 64.2-2002).
- DARS would not be named as guardian, rather guardianship would be placed with one of the local providers contracted with DARS to provide guardianship services, or perhaps with a friend or family member who has intervened in the proceeding if the court believes that person is suitable and able to serve.
- Finally, DARS would not benefit financially from serving as petitioner in these cases. If DARS as petitioner is successful, individuals will be placed into slots already funded by the General Assembly for the purpose of providing public guardianship protection and advocacy to individuals meeting the statutory tests.

In furtherance of this position, DARS recommends amending § 51.5-150 of the Code of Virginia by the insertion a new Section E which provides as follows:

E. In circumstances where the Department cannot identify another proper and suitable person willing and able to serve as petitioner, the Department may petition a circuit court to request that a guardian or conservator be appointed for any individual who has been accepted for public guardianship or conservatorship services by a local or regional program contracting with the Department to provide such services.

SECTION VI: THE VIRGINIA PUBLIC GUARDIAN AND CONSERVATOR ADVISORY BOARD

The Virginia Public Guardian and Conservator Advisory Board (Board) serves as a technical resource and advisor for the Program. DARS has commended it in past reports to the General Assembly and DARS commends it again in this report. The Board is comprised of up to 15

members representing a broad and diverse stakeholder base. Members include representatives of the Virginia Area Agencies on Aging, the Virginia Bar Association, The Arc of Virginia, the National Alliance on Mental Illness (NAMI) Virginia, the Virginia Association of Community Services Boards, and the Virginia League of Social Services Executives and a retired circuit court judge.

Accomplishments of the Board

- **Legislative Involvement**: The Board, along with stakeholders, successfully advocated for additional funding for the Program in 2015 and 2016.
- **Training by Board Members**: In October 2016, George McAndrews, Esq. gave an overview of the Program at the Virginia Local Government Attorneys Conference in Williamsburg. DARS develops and provides comprehensive annual training for public guardians, and Board members are active participants. At the 2017 training, LaTroyal Smith-Roxburgh, MSW, LCSW, presented on mental health skills building and managing expectations when providing services to individuals with serious mental illness; Paul Izzo, Esq. provided an overview of Virginia law governing guardianship and the fiduciary obligations of guardians; and Debra Smith, Director of Training Center Discharges and Community Integration, DBHDS, addressed the guardianship needs of individuals with intellectual or other developmental disabilities and the role of CSBs in services planning. Dr. Paul Aravich, a former board chair, also provided training on the importance of guardianship services for individuals incapacitated by serious mental illnesses.
- **Person-Centered Regulations**: The Board crafted the amendments of 22 Va. Admin. Code § 30-70-30 to ensure local public guardianship providers utilize person-centered planning practices to the extent feasible when addressing the needs of each individual served by their programs. The regulations were adopted as final regulations of the Commonwealth on October 19, 2016.
- **Ongoing Collaboration and Strong Support**: The Board has been instrumental in encouraging individual public guardianship providers across the Commonwealth. The Board invites Program staff and the staff of public guardianship providers to attend Board meetings and offer presentations in order to keep apprised of issues and to provide expert feedback.

Recommendations of the Board

Guardianship serves one of society's most vulnerable populations—older individuals and those with disabilities who need assistance in making decisions about their health, lives, and finances and who may be at risk of abuse, neglect, or exploitation. In recent years, the Board has seen an increased demand for public guardians as Virginia undergoes a demographic shift with increases in the aging and disability populations. Also, more public guardians have been needed for incapacitated persons leaving state training centers under the DOJ Settlement Agreement.

Board Recommendation #1

Virginia Code § 51.5-150 requires DARS to contract with a research entity every four years to evaluate local public guardian and conservator programs to identify trends and provide recommendations. The last report was done in 2007. See The Need for Public Guardians in the

Commonwealth of Virginia—Final Report, Center for Gerontology, Virginia Polytechnic Institute and State University, Roberto, Duke, Brossoie and Teaster (2007). Current demographic data would assist DARS in determining how best to allocate slots across the Commonwealth. The Board requests a budget amendment for \$30,000 to quantify unmet needs for the public guardians in Virginia and provide recommendations for Program improvements.

Board Recommendation #2

In 2017, the Virginia Supreme Court established the Virginia Working Interdisciplinary Network of Guardianship Stakeholders, also known as WINGS. This is a court and community partnership to improve practices in the guardianship and conservator system. The Board supports the work of Virginia WINGS, especially in its promotion of innovative models to strengthen oversight of and accountability by all private and public guardians and conservators.

DARS supports the recommendations of the Board.

SECTION VII: STRATEGIC PLANNING AND PARTNERING

Upcoming Retirements and Succession Planning

Public guardianship providers demonstrate a high level of commitment and concern for the individuals served by Program. They are extraordinary in their skill as professional guardians and in complying with numerous legal, regulatory, contractual, and programmatic requirements. Unfortunately, a quarter of the most experienced local program directors are expected to retire in the next five to 10 years. As these individuals retire, it will be challenging to attract and retain staff with the same level of expertise and commitment. To address this issue, DARS has provided succession planning training and will continue to consult with local providers on succession planning. Eleven of the 13 public guardianship providers are operated by larger social services organizations which are committed to maintaining high standards for all of their programs. DARS will work cooperatively with these organizations to ensure that they are mindful of the need for strong leadership of the public guardianship services provided through their organizations.

Partnerships and Pro-Active Education (2016-2018 Focus)

As more agencies and nonprofits grapple with an increasing demand for services without a corresponding increase in funds, partnerships will grow increasingly important to leverage limited resources. Pro-active education is an important key in educating the public about alternatives to guardianship *before* guardianship becomes necessary. Whether incapacity arises out of a car accident, Alzheimer's disease, or an unexpected debilitating illness, the Program has a vested interest in educating the public so that unnecessary guardianships can be avoided and less restrictive alternatives to guardianship, such as advanced medical directives and powers-of-attorney, are in place whenever possible.

Virginia Administrative Code
Title 22. Social Services
Agency 30. Department for Aging and Rehabilitative Services

Chapter 70. Chapter 70 the Virginia Public Guardian and Conservator Program

22VAC30-70-10. Definitions.

The following words and terms when used in this regulation shall have the following meaning unless the context clearly indicates otherwise:

"Advisory board" means the Virginia Public Guardian and Conservator Advisory Board as authorized by §§ 2.2-2411 and 2.2-2412 of the Code of Virginia.

"Client" means a person who has been adjudicated incapacitated and who is receiving services from a public guardian program.

"Conservator" means a person appointed by the court who is responsible for managing the estate and financial affairs of an incapacitated person and, where the context plainly indicates, includes a "limited conservator" or a "temporary conservator." The term includes (i) a local or regional program designated by the Department for Aging and Rehabilitative Services as a public conservator pursuant to §§ 51.5-149, 51.5-150, and 51.5-151 of the Code of Virginia or (ii) any local or regional tax-exempt charitable organization established pursuant to § 501(c)(3) of the Internal Revenue Code to provide conservatorial services to incapacitated persons. Such tax-exempt charitable organization shall not be a provider of direct services to the incapacitated person. If a tax-exempt charitable organization has been designated by the Virginia Department for Aging and Rehabilitative Services as a public conservator, it may also serve as a conservator for other individuals. Incorporated by reference to this definition is the definition of "conservator" found in § 37.2-1000 of the Code of Virginia and any successor language thereof.

"Department" means the Department for Aging and Rehabilitative Services.

"Guardian" means a person appointed by the court who is responsible for the personal affairs of an incapacitated person, including responsibility for making decisions regarding the person's support, care, health, safety, habilitation, education, therapeutic treatment, and, if not inconsistent with an order of involuntary admission, residence. Where the context plainly indicates, the term includes a "limited guardian" or a "temporary guardian." The term includes (i) a local or regional program designated by the department as a public guardian pursuant to §§ 51.5-149, 51.5-150, and 51.5-151 of the Code of Virginia or (ii) any local or regional tax-exempt

charitable organization established pursuant to § 501(c)(3) of the Internal Revenue Code to provide guardian services to incapacitated persons. Such tax-exempt charitable organization shall not be a provider of direct services to the incapacitated person. If a tax-exempt charitable organization has been designated by the department as a public guardian, it may also serve as a guardian for other individuals. Incorporated by reference to this definition is the definition of "guardian" found in § 37.2-1000 of the Code of Virginia and any successor language thereof.

"Incapacitated person" means an adult who has been found by a court to be incapable of receiving and evaluating information effectively or responding to people, events, or environments to such an extent that the individual lacks the capacity to (i) meet the essential requirements for his health, care, safety, or therapeutic needs without the assistance or protection of a guardian or (ii) manage property or financial affairs or provide for his support or for the support of his legal dependents without the assistance or protection of a conservator. A finding that the individual displays poor judgment alone shall not be considered sufficient evidence that the individual is an incapacitated person within the meaning of this definition. A finding that a person is incapacitated shall be construed as a finding that the person is "mentally incompetent" as that term is used in Article II, Section 1 of the Constitution of Virginia and Title 24.2 of the Code of Virginia unless the court order entered pursuant to this chapter specifically provides otherwise. Incorporated by reference to this definition is the definition of "incapacitated person" found in § 37.2-1000 of the Code of Virginia and any successor language thereof.

"Indigency" means the client is a current recipient of a state-funded or federally funded public assistance program for the indigent or as otherwise defined in § 19.2-159 of the Code of Virginia.

"Least restrictive alternatives" means, but is not limited to money management services including bill payer and representative payee services, care management, and services provided pursuant to a financial or health care power of attorney.

"Minimal fee" means allowable fees collected or payable from government sources and shall not include any funds from an incapacitated person's estate.

"Public guardian program" means a local or regional public or private nonprofit entity or program designated by the department as a public guardian, a public conservator or both, pursuant to §§ 51.5-150 and 51.5-151 of the Code of Virginia, and operating under a contract entered into with the department.

Statutory Authority

§ 51.5-131 of the Code of Virginia.

22VAC30-70-20. Introduction and purpose.

A. Introduction. Pursuant to § 51.5-149 of the Code of Virginia, the General Assembly declared that the policy of the Commonwealth is to ensure the appointment of a guardian or conservator to persons who cannot adequately care for themselves because of incapacity to meet essential living requirements where (i) the incapacitated person is indigent, and (ii) there is no other proper and suitable person willing and able to serve in such capacity.

B. Purpose. This regulation sets forth requirements for the statewide program of local and regional public guardian programs and establishes the requirements for local and regional entities to operate a designated public guardian program.

Statutory Authority

§ 51.5-131 of the Code of Virginia.

22VAC30-70-30. Public guardian programs.

A. Designation. The department shall select public guardian programs in accordance with the requirements of the Virginia Public Procurement Act. Only those programs that contract with the department shall be designated as public guardian programs. Funding for public guardian programs is provided by the appropriation of general funds.

B. Authority. A public guardian program appointed as a guardian, a conservator, or both as a guardian and conservator, shall have all the powers and duties specified in Chapter 20 (§ 64.2-2000 et seq.) of Title 64.2 of the Code of Virginia, except as otherwise specifically limited by a court.

C. Structure.

1. Each public guardian program shall have a program director who supervises and is responsible for providing guardianship services to any incapacitated persons assigned by the court and to provide overall administration for the public guardian program. The program director shall be a full-time employee of the program and have experience as a service provider or administrator in one or more of the following areas: social work, case management, mental health, nursing or other human service programs. The program director shall also demonstrate, by objective criteria, a knowledge and understanding of Virginia's guardianship laws, alternatives to guardianship, and surrogate decision making activities. The program director shall attend all training and activities required by the department.

2. Each public guardian program shall establish a multidisciplinary panel to (i) screen cases for the purpose of ensuring that appointment of a guardian or conservator is appropriate under the circumstances and is the least restrictive alternative available to assist the incapacitated person. This screening shall include a duty to recommend the most appropriate limitations on the power of the guardian or conservator, if any, to ensure that the powers and duties assigned are the least restrictive, and (ii) annually review cases being handled by the program to ensure that a guardian or conservator appointment remains appropriate. Composition of a multidisciplinary panel should include representatives from various human services agencies serving the city, county, or region where the public guardian program accepts referrals. If serving a region, the multidisciplinary panel shall have at least one representative from each local jurisdiction within the region. To the extent appropriate disciplines are available, this panel should include but is not limited to representation from:

- a. Local departments of social services, adult protective services;
- b. Community services boards or behavioral health authorities;
- c. Attorneys licensed by the Virginia State Bar;
- d. Area agencies on aging;
- e. Local health departments;
- f. Nursing home, assisted living, and group home administrators; and
- g. Physicians and community representatives.

D. Client ratio to paid staff.

1. Each public guardian program shall maintain a direct service ratio of clients to paid staff that does not exceed the department's established ideal ratio of 20 incapacitated persons to every one paid full-time staff person 20:1.
2. Each public guardian program shall have in place a plan to immediately provide notice to the circuit court or courts in its jurisdiction and to the department when the program determines that it may exceed its ideal ratio of clients to paid staff.
3. In an emergency or unusual circumstance, each program, in its discretion, may exceed the department's established ideal ratio by no more than five additional incapacitated persons. Each program shall have in place a policy to immediately provide notice to the department when such an emergency or unusual circumstance occurs and when the emergency or unusual circumstance ends and the ideal ratio has returned to 20:1. The notice to the department shall

comply with policy established by the department. Other than an emergency or unusual circumstance as described in the preceding sentence, a waiver must be requested to exceed the department's established ideal ratio. The department, in consultation with the advisory board, shall establish written procedures for public guardian programs to obtain appropriate waivers regarding deviations in the ideal ratio of clients to paid staff. Procedures shall comply with §§ 51.5-150 and 51.5-151 of the Code of Virginia. The department shall report waiver requests and status of granted waivers to the advisory board at its regularly scheduled meetings. The department shall review such waivers every six months to ensure that there is no immediate threat to the person or property of any incapacitated person nor that exceeding the department's established ideal ratio is having or will have a material and adverse effect on the ability of the program to properly serve all of the incapacitated persons it has been designated to serve.

E. Appointments.

1. Prior to the public guardian program accepting an individual for services, the multidisciplinary panel described in subdivision C 2 of this section shall screen referrals to ensure that:

a. The public guardian program is appointed as guardian, or conservator, or both only in those cases where guardianship or conservatorship is the least restrictive alternative available to assist the individual;

b. The appointment is consistent with serving the type of client identified by the established priorities of the public guardian program;

c. The individual cannot adequately care for himself;

d. The individual is indigent; and

e. There is no other proper or suitable person or entity to serve as guardian.

f. In the case of an individual who receives case management services from a community services board (CSB) or behavioral health authority (BHA), the multidisciplinary panel may also request the results of the "determination of capacity" as authorized by 12VAC35-115-145 (Determination of capacity to give consent or authorization) and verification that no other person is available or willing to serve as guardian pursuant to 12VAC35-115-146 E (Authorized representatives).

2. Appointments by a circuit court shall name the public guardian program, rather than an individual person, as the guardian, the conservator or both guardian and conservator.

3. A public guardian program shall only accept appointments as guardian, conservator, or both guardian and conservator that generate no fee or that generate a minimal fee.

F. Services.

1. A public guardian program shall have a continuing duty to seek a proper and suitable person who is willing and able to serve as guardian, conservator, or both guardian and conservator for the incapacitated person.

2. The guardian or conservator shall encourage the incapacitated person to participate in decisions, to act on his own behalf, and to develop or regain the capacity to manage his personal affairs to the extent feasible.

3. The guardian or conservator shall be guided by person-centered planning that:

a. Focuses on the expressed preferences, personal values, and needs of the individual receiving public guardian program services; and

b. Empowers and supports the individual receiving public guardian program services, to the extent feasible, in defining the direction for his life and promoting self-determination and community involvement.

4. To the maximum extent feasible, the person-centered planning process shall:

a. Include people chosen by the individual;

b. Provide necessary information and support to enable the individual to direct the process and to make informed choices and decisions;

c. Be timely and occur at times and locations convenient for the individual;

d. Require participation and collaboration, in the case of an individual receiving case management services licensed or funded by the Department of Behavioral Health and Developmental Services, among the guardian or conservator, case managers, and providers in meeting the individual's planning goals, in conformity with the guardian or conservator's court order;

e. Reflect the individual's cultural values;

f. Offer choices to the individual regarding the services the individual receives and from whom the individual receives those services; and

- g. Include documentation of processes employed in and the outcomes of person-centered planning.
5. The multidisciplinary panel described in subdivision C 2 of this section shall review active cases at least once every 12 months to determine that:
- a. The client continues to be incapacitated;
 - b. The client continues to be indigent; and
 - c. There is no other proper or suitable person or entity to serve as guardian, conservator, or both guardian and conservator.
6. Each public guardian program shall set priorities with regard to services to be provided to incapacitated persons in accordance with its contract with the department.
7. Each public guardian program shall develop written procedures and standards to make end-of-life decisions or other health-related interventions in accordance with the expressed desires and personal values of the incapacitated person to the extent known. If expressed desires or personal values are unknown, then written procedures, including an ethical decision-making process, shall be used to ensure that the guardian or conservator acts in the incapacitated person's best interest and exercises reasonable care, diligence and prudence on behalf of the client.
8. The public guardian program shall avoid even the appearance of a conflict of interest or impropriety when dealing with the needs of the incapacitated person. Impropriety or conflict of interest arises where the public guardian program has some personal or agency interest that might be perceived as self-serving or adverse to the position or the best interest of the incapacitated person. Examples include, but are not limited to, situations where the public guardian program provides services such as housing, hospice or medical care directly to the client. The department reserves the right to monitor all administrative, programmatic, and financial activities related to the public guardian program to ensure compliance with the terms of the contract between the department and the public guardian program.
9. Each public guardian program and its employees are required to report any suspected abuse, neglect, or exploitation in accordance with § 63.2-1606 of the Code of Virginia, which provides for the protection of aged or incapacitated adults, mandates reporting, and provides for a penalty for failure to report.
10. Each public guardian program shall submit data and reports as required by the department and maintain compliance with the department's program guidelines. The department shall

periodically monitor administrative, programmatic, and financial activities related to the public guardian program, including person-centered planning utilization and documentation, to ensure compliance with the terms of the contract between the public guardian program and the department.

Statutory Authority

§§ 51.5-131 and 51.5-150 of the Code of Virginia.

22VAC30-70-40. Personnel standards.

A. Each paid staff who is working in the public guardian program and has direct contact with clients or client estates shall:

1. Complete an orientation program concerning guardian and conservator duties to include the following subjects:
 - a. Privacy and confidentiality requirements;
 - b. Recordkeeping;
 - c. Services provided, and standards for these services;
 - d. A historical and factual review about the needs of the elderly and people with disabilities; and
 - e. Indications of and actions to be taken where adult abuse, neglect, or exploitation is suspected.
2. Have a satisfactory work record and be a person of good character; demonstrate a concern for the well-being of others to the extent that the individual is considered suitable to be entrusted with the care, guidance, and protection of an incapacitated person; and have not been convicted of any criminal offense involving any physical attack, neglect or abuse of a person, lying, cheating, or stealing nor convicted of any felony. A criminal record check will be conducted on each person hired on or after January 1, 2009.
3. Be free of illegal drug use as confirmed by a drug screening test conducted prior to the assumption of any duties with an incapacitated person for each person hired on or after January 1, 2009.
4. Demonstrate, by objective criteria, knowledge of Virginia's guardianship laws and alternatives to guardianship. For each person hired on or after January 1, 2009, minimum education requirements apply and include a high school diploma or general education diploma

(GED) from a Virginia accredited program and training or course work on (i) the duties and powers of guardians and conservators in Virginia, including an understanding of surrogate decision making and how it differs from substituted judgment decision-making standards, (ii) mandatory reporting requirements to the Department of Social Services and Commissioner of Accounts where applicable, and (iii) working with special needs populations including individuals with physical and mental disabilities. Program directors have additional requirements as specified in 22VAC30-70-30 C 1.

5. Participate in mandatory training programs required by the department.

B. Volunteers.

1. Volunteers may be recruited and used to supplement paid staff. However, volunteers shall not be included in the public guardian program direct service ratio of 20 incapacitated persons to every one paid staff person as required under 22VAC30-70-30 D 1.

2. Volunteers may not exercise the authority of a guardian or conservator.

3. Each public guardian program that uses volunteers shall develop and implement written procedures for volunteer management and supervision including requirements that each volunteer shall:

a. Complete an orientation program that provides an overview of the Virginia Public Guardian and Conservator Program (§§ 51.5-149, 51.5-150, and 51.5-151 of the Code of Virginia).

b. Complete an orientation program that provides an overview of the local public guardian program for which the person intends to serve as a volunteer, including (i) services provided by the local program, (ii) specific duties of the volunteer, (iii) privacy and confidentiality requirements, (iv) recordkeeping and documentation requirements, and (v) indications of and action to be taken where adult abuse, neglect, or exploitation is suspected.

c. Have a satisfactory work record and personal record and be a person of good character and have not been convicted of any criminal offense involving any physical attack, neglect or abuse of a person, lying, cheating, or stealing nor convicted of any felony. A criminal record check will be conducted on each volunteer accepted by the local program on or after January 1, 2009.

Statutory Authority

§ 51.5-150 of the Code of Virginia.

22VAC30-70-50. Recordkeeping.

A. Each public guardian program shall maintain an accurate and complete client record for each incapacitated person. Records shall be kept confidential. Access to client records shall be limited to the client's legal representative; as directed by court order; as directed by duly authorized government authorities or as specifically authorized by the Code of Virginia or federal statutes, including by written consent of the client's legal representative. Provision shall be made for the safe storage of client records or accurate and legible reproductions for a minimum of five years following termination of the guardian or conservator court order.

B. The client's record shall contain a Virginia Uniform Assessment Instrument (UAI) or a similar comprehensive assessment instrument, a care plan, a values history, the annual report by guardians submitted to the Department of Social Services as required by § 64.2-2020 of the Code of Virginia, the annual accounting to the Commissioner of Accounts as required by § 64.2-1305 of the Code of Virginia, and all applicable court orders and petitions. A client's record shall be completed and on file within 60 days of the program's appointment as guardian.

C. Each public guardian program shall maintain all records, provide reports, including audit information and documents in accordance with its contract with the department.

Statutory Authority

§ 51.5-150 of the Code of Virginia.

22VAC30-70-60. Evaluation and monitoring of public guardian programs.

The department shall periodically administer, monitor, evaluate, provide technical assistance and expertise, and shall ensure fiscal accountability and quality of service of public guardian programs.

Statutory Authority

§ 51.5-150 of the Code of Virginia.

Fiscal Year 2018Fiscal Year 2018 Client Slots Contracted to Local Guardianship Providers					
	Unrestricted	DBHDS- ID/DD	DBHDS-MI	MI-ID	TOTAL
Alleghany Highlands Community Services (CSB)	18	0	0	0	18
Appalachian Agency for Senior Citizens	35	0	0	0	35
The Arc of Northern Virginia	17	33	0	0	50
Autumn Valley Guardianship	6	15	0	0	21
Bridges Senior Care Solutions REGIONAL PROGRAM	56	104	34	0	194
Catholic Charities of Eastern Virginia	58	38	0	0	96
Commonwealth Catholic Charities	16	84	0	20	120
District Three Senior Services REGIONAL PROGRAM	78	23	24	0	125
Family Services of Roanoke Valley	34	46	0	0	80
Jewish Family Services of Richmond	22	18	0	0	40
Jewish Family Services of Tidewater REGIONAL PROGRAM	62	83	39	0	184
Mountain Empire Older Citizens	45	0	0	0	45
Senior Connections Capital Area Agency on Aging	10	10	0	20	40
Totals	457	454	97*	40	1048*

* One DBHDS-MI slot is unallocated and is being held in reserve as a floater to be allocated to the appropriate local program as the need arises.

Virginia Public Guardian and Conservator Program

Geographic Service Areas – Fiscal Year 2018

AGENCY NAME	SERVICE AREA
Alleghany Highlands Community Services (CSB) 543 Church Street Clifton Forge, VA 24422 Phone: (540) 863-1620	Counties of Alleghany, Bath, Highland, and Rockbridge Cities of Covington, Buena Vista, and Lexington
Appalachian Agency for Senior Citizens, Inc. 216 College Ridge Road Wardell Industrial Park PO Box 765 Cedar Bluff, VA 24609-0765 Phone: (276) 964-7114	Counties of Buchanan, Dickenson, Russell, and Tazewell
The Arc of Northern Virginia 2755 Hartland Road, Suite 200 Falls Church, VA 22043 Phone: (703) 208-1119	Counties of Arlington, Fairfax, and Prince William Cities of Alexandria, Falls Church, Fairfax, Manassas, and Manassas Park
Autumn Valley Guardianship P.O. Box 847 Basye, VA 22810 Phone: (540) 421-5107	Counties of Augusta, Clarke, Frederick, Page, Rockingham, Shenandoah, and Warren Cities of Harrisonburg, Staunton, Waynesboro, and Winchester
Bridges Senior Care Solutions REGIONAL PROGRAM P.O. Box 1310 Fredericksburg, VA 22402 Phone: (540) 899-3404	Counties of Albemarle, Caroline, Culpeper, Essex, Fauquier, Fluvanna, Greene, Halifax, King George, Lancaster, Loudoun, Louisa, Madison, Matthews, Mecklenburg, Middlesex, Nelson, Northumberland, Orange, Prince William, Rappahannock, Richmond, Spotsylvania, Stafford, and Westmoreland Cities of Charlottesville, Fredericksburg, and South Boston
Catholic Charities of Eastern Virginia 4855 Princess Anne Road Virginia Beach, VA 23462 Phone: (757) 467-7707	Counties of Accomack, Gloucester, Greensville, Isle of Wight, James City, Matthews, Northampton, Southampton, Surry, and York Cities of Chesapeake, Emporia, Franklin, Hampton, Newport News, Norfolk, Poquoson, Portsmouth, Suffolk, Virginia Beach, and Williamsburg

<p>Commonwealth Catholic Charities Phone: (804) 285-5900 1601 Rolling Hills Drive Richmond, VA 23229 Phone: (804)-545-5953</p>	<p>Counties of Amelia, Brunswick, Buckingham, Charlotte, Chesterfield, Cumberland, Dinwiddie, Henrico, Lunenburg, Nottoway, and Prince Edward</p>
<p>District Three Senior Services REGIONAL PROGRAM 4453 Lee Highway Marion, VA 24354-4269 Phone: (276) 783-8157</p>	<p>Counties of Bland, Carroll, Floyd, Giles, Grayson, Montgomery, Pulaski, Smyth, Washington, and Wythe</p> <p>Cities of Bristol, Galax, and Radford</p>
<p>Family Services of Roanoke Valley 360 Campbell Avenue, SW Roanoke, VA 24016 Phone: (540) 563-5316</p>	<p>Counties of Amherst, Appomattox, Bedford, Botetourt, Campbell, Craig, Franklin, and Roanoke</p> <p>Cities of Bedford, Lynchburg, Roanoke, and Salem</p>
<p>Jewish Family Services of Richmond 6718 Patterson Avenue Richmond, VA 23226 Phone: (804) 282-5644</p>	<p>Counties of Goochland, Hanover, Powhatan, Prince George, and Sussex</p> <p>Cities of Hopewell and Petersburg</p>
<p>Jewish Family Services of Tidewater REGIONAL PROGRAM P.O. Box 65127 Virginia Beach, VA 23467 5000 Corporate Woods Dr. Suite 300 Virginia Beach VA 23462 Phone: (757) 938-9130</p>	<p>Counties of Gloucester, Henry, Isle of Wight, James City, King & Queen, King William, Matthews, Middlesex, Patrick, Pittsylvania, Southampton, and York</p> <p>Cities of Chesapeake, Danville, Franklin, Hampton, Martinsville, Newport News, Norfolk, Poquoson, Portsmouth, Suffolk, Virginia Beach, and Williamsburg</p>
<p>Mountain Empire Older Citizens 1501 3rd Avenue East P.O. Box 888 Big Stone Gap, VA 24219 Phone: (276) 523-4202</p>	<p>Counties of Lee, Scott, and Wise</p> <p>City of Norton</p>
<p>Senior Connections 24 East Cary Street Richmond, VA 23219-3796 Phone: (804) 343-3031</p>	<p>Counties of Charles City and New Kent</p> <p>City of Richmond</p>

