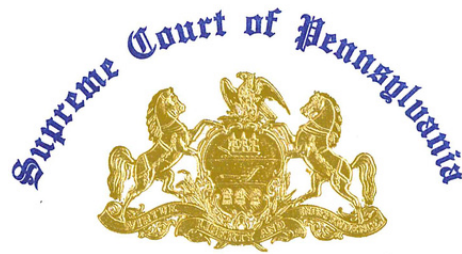


ADVISORY COUNCIL
ON **ELDER**
JUSTICE
SUPREME COURT OF PENNSYLVANIA

2022 ANNUAL REPORT



One Oxford Centre, Suite 3130
Pittsburgh, Pennsylvania 15219



Telephone: 412-565-2680

Chief Justice Debra Todd

July 2023

Greetings,

As Liaison to the Advisory Council on Elder Justice in the Courts, and on behalf of the Supreme Court of Pennsylvania, I am honored to introduce the 2022 Annual Report of the Advisory Council. It is my pleasure to recognize the tremendous accomplishments of the Council's leadership, members, and contributing staff, along with the staff of the Office of Elder Justice in the Courts ("OEJC") in addressing the needs of older Pennsylvanians and the challenges they face.

I express my personal gratitude to former Chief Justices Ronald D. Castille and Thomas G. Saylor, and the late Chief Justice Max Baer, and to former State Court Administrators Tom Darr and Zygmunt Pines, Esquire, and current State Court Administrator Geoffrey Moulton, Esquire, for their leadership and support.

I am grateful to Advisory Council Chair Senior Judge Paula Francisco Ott, OEJC Director Cherstin Hamel, OEJC Analyst Supervisor Keith Hinkel Jr., AOPC Legislative Affairs Director Damian Wachter, Esquire, and my Chief Administrative Judicial Assistant Rhonda Campbell for their time and effort in the preparation of this Report.

The Advisory Council members are to be commended for their commitment to meeting the challenges faced by our Commonwealth in addressing the growing needs of older Pennsylvanians. This Report highlights the work of the Council and the OEJC, which received a three-year (approximately \$3 million) Elder Justice Innovation Grant from the federal Administration for Community Living. This grant will support our ongoing efforts to protect older adults.

In addition, our Guardianship Tracking System, which was created in-house by AOPC IT personnel, has been enhanced to provide an improved experience for guardians and court staff, and to help courts protect persons with a guardian and safeguard financial assets under court supervision.

Vice President Hubert H. Humphrey once said, "The moral test of a government is how it treats those who are at the dawn of life, the children; those who are in the twilight of life, the aged; and those who are in the shadow of life, the sick, the needy, and the handicapped." The progress recounted in this Report represents our Supreme Court's ongoing effort to meet this moral test.

Sincerely,

Debra Todd



ELDER JUSTICE

The Advisory Council on Elder Justice in the Courts focuses on ensuring access to justice and due process for elders, the protection of vulnerable persons with a guardianship, and the prevention of elder abuse, neglect, and exploitation of older adults.



ABOUT THE ADVISORY COUNCIL

The Advisory Council on Elder Justice in the Courts (Advisory Council) was established in 2015 to advise the Office of Elder Justice in the Courts (OEJC) regarding the implementation of the Elder Law Task Force’s (ELTF) Report and Recommendations regarding best practices, judicial rules, and legislation to benefit older citizens of the Commonwealth. In addition to the 2022 accomplishments discussed in this Annual Report, the Advisory Council continues its work on the implementations of those recommendations.

The mission of the Advisory Council is to identify and address elder justice issues affecting older Pennsylvanians.

The Advisory Council and OEJC exist to identify areas of need and challenges faced by elders, and to improve the ability of Pennsylvania courts to meet those needs.

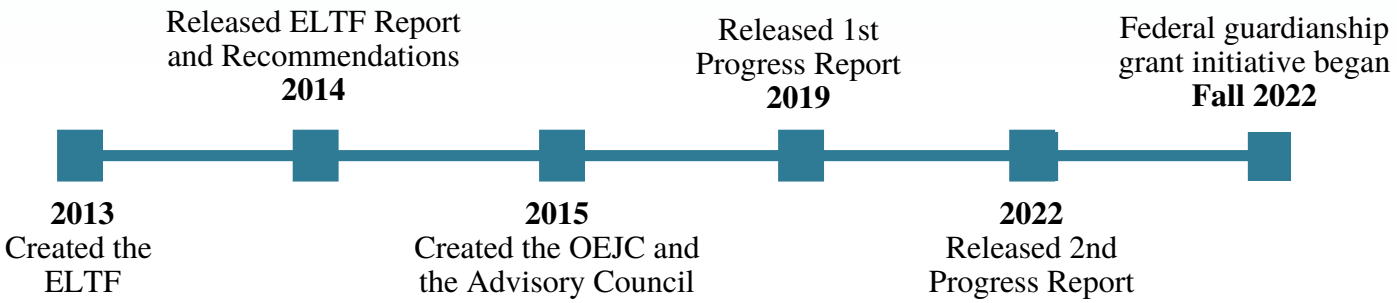
ABOUT THE OEJC

The OEJC promotes best practices to address elder abuse and neglect, guardianship, and access to justice in the Commonwealth’s courts. The OEJC also educates judges, court staff, attorneys, guardians, the public, and others about the warning signs of elder abuse, and how to respond to suspected elder abuse.

In addition to education and best practices, the OEJC actively fosters collaboration with other elder justice entities and branches of government to enhance older Pennsylvanians’ ability to fully participate in legal proceedings.



TIMELINE OF PENNSYLVANIA SUPREME COURT'S ELDER JUSTICE INITIATIVE



2022 ADVISORY COUNCIL MEMBERS

**Long Range Planning Committee Members*

LEADERSHIP

Chair

Honorable Paula Francisco Ott*
Senior Judge

Vice-Chair

Zygmunt A. Pines, Esquire*
Former Court Administrator of Pennsylvania

Supreme Court Liaison

Chief Justice Debra Todd*
Supreme Court of Pennsylvania

Director, Office of Elder Justice in the Courts

Cherstin Hamel*
Administrative Office of Pennsylvania Courts

STANDING MEMBERS

Secretary, Pennsylvania Department of Aging

Honorable Robert Torres

Staff Designees, Neeka Jones, Esquire and
Deborah Hargett-Robinson, Esquire

Pennsylvania Senate

Senator Maria Collett

Staff Designee, Tom Holroyd

Pennsylvania House of Representatives

Representative Gary Day

Staff Designee, Shannon Walker

Chair, Supreme Court Orphans' Court

Procedural Rules Committee

Honorable Emil A. Giordano (Ret.)

Norris McLaughlin

Pennsylvania Attorney General

Attorney General Josh Shapiro

Staff Designee, David Shallcross

Pennsylvania Bar Association Designee

Anne N. John, Esquire

Past President, Pennsylvania Bar Association
John and John, Attorneys at Law

Allegheny County Orphans' Court Division

Honorable Lawrence J. O'Toole

Administrative Judge

Philadelphia County Orphans' Court Division

Honorable Sheila A. Woods-Skipper*

Administrative Judge

Register of Wills and Clerks of Orphans' Court

Association Designee

Sarah E. Edwards

Butler County Register of Wills & Clerk of Orphans' Court

MEMBERS

Karen C. Buck, Esquire*

Executive Director
SeniorLAW Center
Philadelphia

Arthur N. DiLoreto

Deputy Director
Pennsylvania Association of Area Agencies on Aging, Inc.
Harrisburg

Honorable Dale M. Fouse

Judge
Court of Common Pleas
Beaver County

Jason Karlawish, M.D.

Division of Geriatrics, Ralson-Penn Center
Philadelphia

2022 ADVISORY COUNCIL MEMBERS

**Long Range Planning Committee Members*

MEMBERS (CONT.)

John N. Kennedy, Esquire
Kennedy, PC Law Offices
Harrisburg

Rebecca May-Cole
Executive Director
Pennsylvania Association of Area Agencies
on Aging, Inc.
Harrisburg

Diane Menio*
Executive Director
Center for Advocacy for the Rights and Interests
of the Elderly
Philadelphia

Honorable Lois E. Murphy*
Administrative Judge, Orphans' Court Division
Court of Common Pleas
Montgomery County

Grace W. Orsatti, Esquire
Assistant Professor of Clinical Legal Education,
Tribone Center for Clinical Legal Education
Duquesne University School of Law
Pittsburgh

Elizabeth L. Pettis, Esquire
Chief Counsel
Governor's Office of General Counsel
Annville

Mary Catherine Scott, Esquire
Director and Assistant Clinical Professor, Central
Pennsylvania Law Clinics
Widener University School of Law
Harrisburg

Pamela Walz, Esquire
Co-Director, Aging and Disabilities Unit
Community Legal Services
Philadelphia

Honorable George N. Zanic*
President Judge
Court of Common Pleas
Huntingdon County

Stephen A. Zappala Jr., Esquire
District Attorney
Allegheny County

ANNUAL REPORT CONTRIBUTING STAFF

Rhonda Campbell
Chief Judicial Assistant
Chief Justice Debra Todd
Supreme Court of Pennsylvania

Cherstin Hamel
Director
Office of Elder Justice in the Courts
Administrative Office of Pennsylvania Courts

Keith Hinkel Jr.
Analyst Supervisor
Office of Elder Justice in the Courts
Administrative Office of Pennsylvania Courts

Cassandra Reed
Grant Compliance Coordinator
Office of Elder Justice in the Courts
Administrative Office of Pennsylvania Courts

Damian Wachter, Esquire
Director
Legislative Affairs
Administrative Office of Pennsylvania Courts



OEJC AWARDED AN ELDER JUSTICE INNOVATION GRANT AWARD

In September 2022, the Administrative Office of Pennsylvania Courts (AOPC) was awarded a three-year (approximately \$3 million) Elder Justice Innovation Grant from the federal Administration for Community Living (ACL). Pennsylvania was one of three states chosen to receive an award through a highly competitive process.

The grant provides assistance to the highest state courts in their efforts to assess and implement improvements in the handling of adult guardianship cases. Work on the grant is being carried out by the OEJC, under the direction of the Advisory Council.

This award supports the Pennsylvania courts' ongoing efforts to protect older adults. The grant project has three overarching goals: (1) to assure due process for the alleged incapacitated person (AIP); (2) to improve guardianship monitoring capabilities to prevent abuse and exploitation; and (3) to promote alternatives to guardianship.

Projects in the process of being implemented include:

- Two statewide, interdisciplinary guardianship summits (one in 2023 and another in 2025). The summits will provide guidance on improving the fairness, effectiveness, and assurance of due process in guardianship proceedings; advancing improvements in monitoring guardians; promoting alternatives to guardianship; and will elicit feedback from stakeholders in Pennsylvania's 60 judicial districts about opportunities for systemic improvement and further education. The summits will also provide opportunities for increased collaboration between state and local organizations.
- A pilot program in one or two judicial districts to provide counsel from a public interest legal services organization to represent older AIPs or incapacitated persons (IPs) over age 60 at all guardianship proceedings where private counsel was not retained. Such representation is vital to ensure that less restrictive alternatives are considered prior to the appointment of a guardian.
- A series of online videos crafted and customized for guardians, judges, court staff, attorneys, individuals, and families that will focus on guardianship best practices, monitoring, alternatives to guardianship, and fiduciary responsibilities. A Pennsylvania Guardian Handbook that will assist newly appointed guardians in understanding their role and responsibilities will be published in conjunction with the videos.

- A web-based resource that will provide information on alternatives to guardianship for families, attorneys, and judges considering a guardianship petition. The project is intended to increase knowledge of alternatives to guardianship and thereby effect a reduction in the number of plenary guardianships.
- Modifications and enhancements to Pennsylvania’s Guardianship Tracking System (GTS), which is nationally recognized as the gold standard for guardianship case data and monitoring. This statewide system allows courts to monitor guardianships more effectively and streamlines the electronic submission of required inventories and annual reports by guardians. The modifications and enhancements will improve the collection and accuracy of guardianship data.
- Dynamic educational programs and trainings for court-appointed guardians, attorneys, judges, and court personnel on various topics including alternatives to guardianship, guardians’ fiduciary duties, and enhancements to GTS.

THE OEJC EXPANDS THROUGH GRANT FUNDING

The OEJC welcomed three new employees hired through grant funding:

- Cassandra Reed - Grant Program Compliance Coordinator
- Joan Bertone - OEJC Trainer
- Cole Benko - OEJC Analyst

These staff members are helping the OEJC to successfully implement numerous grant projects.

These projects are supported by the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$1,145,290, with 100 percent funding by ACL/HHS. The description of the grant is that of the author(s) and does not necessarily represent the official views of, nor an endorsement by, ACL/HHS, or the U.S. Government.



PENNSYLVANIA LAW SCHOOLS SUPPORT THE SUPREME COURT OF PENNSYLVANIA'S ELDER JUSTICE WORK

FIRST ELDER JUSTICE CONSORTIUM IN THE NATION

In response to the Supreme Court’s request that law schools use Interest on Lawyers’ Trust Accounts (IOLTA) funds for elder-related issues, the nine law schools in Pennsylvania jointly formed the country’s first Elder Justice Consortium. The Consortium, which is comprised of law school deans and clinical directors, works to support elder justice initiatives, provide education, and promote advocacy (through law school clinics and other programs) with the goal of producing lawyers to respond to the needs of older adults. Each law school has identified issues affecting older adults in their respective geographical locations to determine where services are most needed and how they might use their expertise to address them.

LAW SCHOOL ELDER LAW COURSE

In 2021, Advisory Council member Professor Mary Catherine Scott, Director and Assistant Clinical Professor, Central Pennsylvania Law Clinics - Widener University Commonwealth Law School (Widener), crafted an elder law course for law schools that is designed to broaden law students’ exposure to elder justice issues and demonstrate that education regarding elder justice issues can be incorporated into course offerings.

The new *Elder Law* course was offered at Widener in fall 2022. It provides a comprehensive overview of elder law and procedures that best serve the older adult population. Discussions are ongoing within the Elder Justice Consortium to make the *Elder Law* course a model to be offered at other Pennsylvania law schools.



OEJC HELPS ELDERS WITH ACCOMMODATIONS AT PHILADELPHIA’S ELDER JUSTICE RESOURCE CENTER

The First Judicial District’s Elder Justice Resource Center (EJRC), established in 2016, is a court-operated resource center located in Philadelphia’s City Hall. The EJRC provides assistance to all Philadelphians in civil court matters but focuses on serving individuals 60 and older and self-represented litigants.

In July, after learning that members of the public had difficulty reading court documents and that some were having hearing difficulties, the OEJC provided the EJRC with a selection of reading glasses in various magnifications and two pocket talkers. Pocket talkers are personal audio amplification devices that assist hard of hearing individuals. The EJRC expressed its gratitude for the donations and conveyed positive feedback from clients who benefitted from the items.

MAGISTERIAL DISTRICT JUDGES OFFERED EDUCATION ON ELDER JUSTICE MATTERS

Magisterial district judges (MDJs) hear criminal, landlord/tenant, and small claims civil cases in which older adults may be at risk for abuse and financial exploitation. The Advisory Council and OEJC provide training and other resources to MDJs and common pleas judges.

In February 2022, the OEJC, in collaboration with the Pennsylvania Office of Attorney General (OAG), Pennsylvania Department of Banking and Securities, and SeniorLAW Center, presented *In Your Court: Identifying Elder Abuse and Financial Exploitation* as part of an educational requirement for all new MDJs. The course highlighted the red flags of abuse and financial exploitation that MDJs may see in cases involving older adults so they can be addressed.

In partnership with the Honorable Gregory Hines (MDJ Court 15-1-03), the OAG, and SeniorLAW Center, the OEJC created a virtual course for MDJs, *Civil and Landlord Tenant Issues Involving Elders*. The course, which was made available in August, was required viewing by all active and senior MDJs as part of their continuing education requirements. It included an overview of the warning signs of elder abuse, the role of the OAG, issues older Pennsylvanians face in landlord/tenant cases, and an overview of Chester County’s MDJ Eviction Protection Court program.



ENHANCED ELDER ABUSE RESOURCE PROVIDED TO JUDGES

The *Pennsylvania Elder Abuse and Neglect Bench Card* (Bench Card), a judicial resource for identifying and reporting elder abuse, was revised with updated information about elder abuse and financial exploitation, and tools for the remediation and management of cases involving these issues.

The revised Bench Card was distributed to all common pleas judges and MDJs.

NEW RESOURCE GUIDE FOR FINANCIAL INSTITUTIONS

The Advisory Council and OEJC, in partnership with representatives from the financial sector, completed the publication and distribution of the *Resource Guide for Financial Institutions Regarding Pennsylvania and Pennsylvania-Compliant Powers of Attorney and Guardianship Orders* in early 2022.

The Guide helps eliminate confusion for front line staff at financial institutions when they are presented with a power of attorney or guardianship order by clearly laying out the differences between the two documents and the legal requirements of each. The Guide also includes best practices for escalating a concern about the documents and whom to contact if abuse or financial exploitation is suspected.



PRO BONO EMERITUS ATTORNEY PROGRAM EXPANDS

In 2018, the Supreme Court adopted Pennsylvania Rule of Disciplinary Enforcement 403, which established an emeritus status for retired attorneys to provide *pro bono* legal representation, and Pennsylvania Rule of Continuing Legal Education 105(d), which established an annual continuing legal education (CLE) requirement of eight hours for attorneys in emeritus status.

As of December 31, 2022, 34 retired attorneys were participating. Work is ongoing with the Pennsylvania Bar Association and court boards to increase awareness about the program through local bar associations and generate *pro bono* support.

The *pro bono* CLE program began as a pilot in January 2019. The program was formally approved for continuation in 2022 and will continue in future years. In 2022, 491 lawyers obtained CLE credit for *pro bono* work, totaling 5,327.5 hours of volunteer service.



ADVISORY COUNCIL COLLABORATES WITH NEW YORK CITY ELDER ABUSE EXPERTS

In September, Advisory Council members Administrative Judge Lois E. Murphy, Rebecca May-Cole, and Karen C. Buck, Esq. met with elder abuse experts at the Weill Cornell Medical Center in New York City (NYC) to learn about NYC's multifaceted approach to addressing elder abuse. This approach includes a multidisciplinary team, an emergency room for elder abuse victims, medical fellowships, and The Cornell-Penn Interview for Decisional Abilities (IDA) tool created by Dr. Mark Lachs and Advisory Council member Dr. Jason Karlawish. The Advisory Council hopes to replicate NYC's hospital-based multidisciplinary team, which was created to address all aspects of the life of a person affected by abuse.

The IDA is a promising new tool designed to help Adult Protective Services (APS) evaluate a person's decision-making abilities, replacing the use of a traditional competency exam. The IDA can help deter APS from pursuing guardianship in certain situations. The Advisory Council hopes to implement the tool in Pennsylvania, and looks forward to ongoing collaboration with its NYC partners.



GUARDIANSHIP MONITORING ACTIVITIES

PROTECTING PERSONS WITH A GUARDIAN

One of the OEJC’s major functions is to assist the courts as they carry out their guardianship monitoring responsibilities. To that end, the OEJC analyzes and reviews guardianship data in GTS. In late 2021, based on newly available data from GTS, the OEJC launched a new and important pilot project to help the courts identify and address guardians’ overdue reports. When a guardian fails to file an inventory of the IP’s assets or an annual report about the IP’s well-being or finances, a concern is raised that the person, or their assets, may be at risk. Inquiries should then be made by the court to ascertain why the report is overdue.

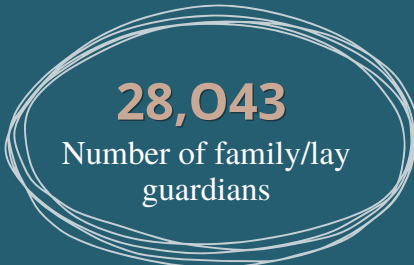
In 2022, the OEJC worked with four counties to address this issue. Through the pilot project, reasons for overdue reports were identified, thereby allowing orphans’ courts to determine the best course of action. The OEJC continues to contact additional counties with the goal of reducing the number of overdue reports statewide.

The OEJC also presented *Reviewing the Inventory and Report of Guardian of the Estate and Reviewing the Report of Guardian of the Person* trainings to 52 court staff and orphans’ court clerks to assist them with addressing flags raised by GTS in annual guardianship reports.

In an example of how the training helps protect persons with a guardian, Advisory Council member Sarah E. Edwards, Butler County Clerk of the Orphans’ Court, reported to the OEJC that GTS flagged an unauthorized gift expense of over \$134,000 in assets transferred out of an incapacitated person’s estate without proper authority.

BY THE NUMBERS

Pennsylvania’s Guardianship Tracking System Statistics as of 12/31/22



\$1,734,162,359.40

TOTAL ASSETS UNDER COURT SUPERVISION

GUARDIANSHIP MONITORING ACTIVITIES (CONT.)

ENHANCEMENTS TO GTS PROVIDE AN IMPROVED EXPERIENCE FOR GUARDIANS AND COURT STAFF

In December, GTS underwent comprehensive enhancements that created an improved user experience for guardians who file their required reports electronically. Every change made to GTS encompasses the dual goals of enhancing the experience of guardians and court users and leveraging the power of GTS to help courts protect persons with a guardian and safeguard financial assets under court supervision.

A new, major enhancement to GTS allows a judge to alert judges and court staff in other counties when a guardian is suspected of committing abuse, neglect, or financial exploitation. This action can be taken without a notification to the guardian in question, thereby allowing courts to be alerted to the concerns without interfering with a potential criminal investigation. The judge(s) receiving the alert can determine if the guardian should be removed from the case(s).

The Supreme Court of Pennsylvania, at the recommendation of the Orphans' Court Procedural Rules Committee and the GTS Governance Committee (led by Advisory Council Chair Senior Judge Paula Francisco Ott), adopted changes to the inventory and annual report forms effective January 1, 2023. These changes include capturing residence information on the inventory for the person with a guardian and greater detail on the reason for ending a guardianship. Such information provides the courts with a better understanding about the well-being of such persons.

The real success story of the GTS is the impact it has had in actively promoting the conversation around guardianship monitoring, shining a light on cases that previously did not receive much attention.
- Amy Whitworth, AOPC IT Analyst Manager



GLOSSARY OF GTS TERMS FOR GUARDIANS

The OEJC created and distributed a glossary of terms designed to assist family/lay guardians who use GTS. The glossary is an especially useful resource for new guardians completing an inventory or annual guardianship report for the first time. The glossary is available on the Unified Judicial System's Portal.

INTEREST IN GTS BY OTHER STATES GROWS

In September, Amy Whitworth, AOPC Information Technology (AOPC IT) Analyst Manager represented the OEJC at a Guardianship Monitoring Protocol Workshop hosted by the National Center for State Courts (NCSC). State court representatives from Minnesota, Vermont, Tennessee, Florida, Utah, Maryland, New Jersey, and Illinois attended to share ideas on effective monitoring of guardianship cases and develop a national protocol for reviewers of reports filed by guardians. Following the workshop, AOPC IT was asked by the NCSC to host two GTS demonstrations for invited guests, and a new Guardianship and Technology Steering Committee was formed to further the exchange of ideas on promoting and improving guardianship monitoring nationwide.

2022 ELDER JUSTICE LEGISLATIVE HIGHLIGHTS

The Advisory Council, together with the AOPC's Legislative Affairs Department, provided input and feedback to the legislature on legislation of importance to its work.



INSTITUTIONAL SEXUAL ASSAULT

Act 61 of 2022 – The Act amended the Crimes Code to define “caretaker” and codify that a caretaker commits an offense of institutional sexual assault – a felony of the third degree – if “the caretaker engages in sexual intercourse, deviate sexual intercourse, or indecent contact with a care-dependent person who receives care, services, or treatment in or from a facility.” The term “care-dependent person” is defined as an “adult who, due to physical or cognitive disability or impairment, requires assistance to meet the needs for food, shelter, clothing, personal care or health care.” The Act became effective on September 9, 2022.

EXPANSION OF THE SLAYER STATUTE

House Bill 2754 – This Bill expands the provisions of the Slayer Statute in Chapter 88 of the Decedents, Estates and Fiduciaries Code to elder abusers, and prohibits them from benefiting from the estate of the individual(s) they abused. The Bill defines the term “elder abuse” to include assault, sexual offenses, theft, and forgery and fraudulent practices, as well as criminal attempt, solicitation, and conspiracy to commit such offenses when the offense is committed against a person 60 years of age or older. The Bill was referred to the House Judiciary Committee on July 21, 2022.

RIGHT TO COUNSEL FOR THE ALLEGED INCAPACITATED PERSON, CERTIFICATION OF GUARDIANS, AND LESS RESTRICTIVE ALTERNATIVES

Senate Bill 1333 – This Bill amends the Decedents, Estates and Fiduciaries Code to require the court to appoint counsel to represent the AIP in any matter in which counsel has not been retained by the AIP, including initial proceedings and any subsequent proceedings to consider, modify, or terminate a guardianship. The Bill also requires individuals seeking guardianship of three or more incapacitated persons to be certified and provide proof of the certification to the court prior to a third guardianship appointment. Finally, the legislation requires the court to consider and make specific findings of fact concerning less restrictive alternatives, examples of which are laid out in the Bill. The Bill was reported unanimously from the Senate Judiciary Committee on September 20, 2022.

House Bill 1928 – This Bill amends the Decedents, Estates and Fiduciaries Code to require the court to appoint counsel to represent the AIP in any matter for which counsel has not been retained by the AIP, including in initial proceedings and in any subsequent proceedings to consider, modify or terminate a guardianship. The Bill was referred to the House Aging and Older Adult Services Committee on September 28, 2021, and remained an active Bill in 2022.

2022 ELDER JUSTICE LEGISLATIVE HIGHLIGHTS (CONT.)

MONTHLY FEE PAID TO GUARDIANS INCREASES

In July 2019, Advisory Council Chair Senior Judge Paula Francisco Ott sent a letter to former Department of Human Services Secretary Teresa Miller, respectfully requesting that the Department review the allowance of fees for guardian services and consider increasing the allowable fee amount. The chair’s letter, combined with legislative efforts undertaken by Representative Gary Day to increase the maximum monthly guardian fee from \$100 to \$300, was key to the Department of Human Services’ decision to increase the fee in 2022. The increase became effective on January 1, 2023.

PROMOTING ALTERNATIVES TO GUARDIANSHIP

MONTGOMERY COUNTY’S ELDER ACCESS TO JUSTICE ROUNDTABLE CONFERENCE

In June, the OEJC provided support to Montgomery County’s 7th Annual Elder Access to Justice Conference. The theme of the conference focused on exploring alternatives to guardianship through presentations, panel discussions, and workshop sessions. Advisory Council members taking part in the event included Administrative Judge Lois E. Murphy, Administrative Judge Sheila A. Woods-Skipper, Pam Walz, Esq., Karen C. Buck, Esq., and Diane Menio.

ADVISORY COUNCIL’S FIVE-YEAR STRATEGIC PLAN

In June, the Advisory Council convened for a one-day strategic planning session to formulate a five-year strategic plan. Goals to be implemented under the plan include increased access to justice for underserved elders, improved guardianship monitoring capabilities, assurance of due process for the AIP through increased appointment of counsel, promoting alternatives to guardianship, and increasing and improving training and education for different elder justice entities.

The ACL grant awarded in September will help accomplish the goals established in the strategic plan. The projects funded through the grant award (*see pages 5 & 6*) align with the goals and will have a significant and positive impact on older Pennsylvanians with a guardianship.

OEJC RESPONDS TO PUBLIC INQUIRIES
In 2022, the OEJC responded to 54 inquiries and requests from members of the public seeking assistance with guardianship and other elder justice issues.



2022 ADVISORY COUNCIL TRAINING PROGRAMS AND EDUCATIONAL PRESENTATIONS

February 15, 2022

**Pennsylvania Senate’s Government Committee Hearing
Harrisburg, PA
*Election Reforms***
Pennsylvania State Senator Maria Collett

February 24, 2022

**Pennsylvania Conference of State Trial Judges
Philadelphia, PA
*“Beyond Britney Spears” Alternatives to Guardianship,
Appointment of Counsel, and Guardianship Reform***
Judge Lois E. Murphy and Pam Walz, Esquire

March 18, 2022

**CARIE and SeniorLAW Center
Virtual Training
*Implementing Supported Decision-Making for
Pennsylvania’s Older Adults***
Karen C. Buck, Esquire and Pam Walz, Esquire

March 28, 2022

**Pennsylvania Association of Elder Law Attorneys
Virtual Training
*Alternatives to Guardianship and the Role of Counsel in
Guardianship Matters***
Judge Lois E. Murphy and Pam Walz, Esquire

April 12, 2022

**Meeting with the Pennsylvania Homecare Association
Harrisburg, PA
*Impacts of the Proposed Budget and the Pandemic on the
Home Care Industry***
Pennsylvania State Senator Maria Collett

April 19, 2022

**U.S. Department of Justice’s Elder Justice Decision-
Making Capacity Symposium
Virtual Conference
*Advances in Aging Brain Research and Their Relevance
for Decision-Making***
Jason Karlawish, MD

May 17 & 18, 2022

**Office of Elder Justice in the Courts
Virtual Training
*Fundamentals of Guardianship: What Family and
Non-Professional Guardians Need to Know***
Joan Krechmer and Keith Hinkel Jr.

May 19, 2022

**Supreme Court of Pennsylvania
Philadelphia, PA
*The Pennsylvania Supreme Court at 300: Past, Present,
& Future***
Justice Debra Todd

May 24, 2022

**Pennsylvania Bar Institute
Virtual Training
*Alternatives to Guardianship***
Judge Lois E. Murphy & Pam Walz, Esquire

June 13, 2022

**Pennsylvania Senate
Public Service Announcement Video
*Raise Awareness for Elder Abuse Awareness Month***
Pennsylvania State Senator Maria Collett

June 17, 2022

**Montgomery County's Elder Access to Justice
Roundtable Conference
Radnor, PA
*“Oops! I Did it Again”:
Exploring Alternatives to
Guardianship***
Judge Lois E. Murphy, Judge Sheila A. Woods-Skipper,
Pam Walz, Esquire and Diane Menio

June 21, 2022

**Joint Hearing of the Pennsylvania Senate’s Aging and
Youth and Health and Human Services Committees
Harrisburg, PA
*Impact of Temporary Nurse Aides and the Ability to
Deliver Quality Care at Nursing Homes***
Pennsylvania State Senator Maria Collett

June 28, 2022

**Pennsylvania Senate’s Judiciary Committee Meeting
Harrisburg, PA
*Passing of HB 975 (Institutional Sexual Assault for Care-
Dependent Individuals)***
Pennsylvania State Senator Maria Collett

June 29 & 30, 2022

**Office of Elder Justice in the Courts
Virtual Training
*Fundamentals of Guardianship: What Family and
Non-Professional Guardians Need to Know***
Joan Krechmer and Keith Hinkel Jr.

2022 ADVISORY COUNCIL TRAINING PROGRAMS AND EDUCATIONAL PRESENTATIONS (CONT.)

July 5-7, 2022

Pennsylvania Intergenerational Conference
State College, PA

Intergenerational Approaches for Living, Learning, and Growing in Pennsylvania

Secretary of Aging Robert Torres

July 12, 2022

Register of Wills and Clerk of the Orphans' Court
Association of Pennsylvania Annual Conference
Skytop, PA

Panel Discussion on Overdue GTS Reports Pilot Program in Butler County

Senior Judge Paula Francisco Ott, Sarah E. Edwards, and Keith Hinkel Jr.

July 19 & 20, 2022

Office of Elder Justice in the Courts
Virtual Training

Fundamentals of Guardianship: What Family and Non-Professional Guardians Need to Know

Joan Krechmer and Keith Hinkel Jr.

July 22, 2022

Pennsylvania Bar Institute's Elder Law Institute
Virtual Training

Guardianship Hot Topics

Pam Walz, Esquire

July 27, 2022

Pennsylvania Bar Association's Solo and Small Firm Conference
Bedford Springs, PA

Pro Bono and Elder Justice

Judge Lois E. Murphy, Karen C. Buck, Esquire, and Anne N. John, Esquire

July 28, 2022

Pennsylvania Conference of State Trial Judges
Hershey, PA

Financial Exploitation of Older Adults – Criminal & Civil Remedies

Judge Lois E. Murphy and President Judge George N. Zanic

August 3, 2022

FBI Philadelphia Division: Elder Crimes and Fraud Conference
Wilkes-Barre, PA

Pennsylvania Dept. of Aging Financial Exploitation Overview
Secretary of Aging Robert Torres

August 23 & 24, 2022

Office of Elder Justice in the Courts
Virtual Training

Fundamentals of Guardianship: What Family and Non-Professional Guardians Need to Know

Joan Krechmer and Keith Hinkel Jr.

September 12, 2022

Pennsylvania Senate
Harrisburg, PA

Remarks on Bayada Home Health and Jefferson Health Joint Venture to Deliver Innovative Care to Older and Disabled Pennsylvanians

Pennsylvania State Senator Maria Collett

September 13, 2022

Pennsylvania Law Schools Elder Justice Consortium
Philadelphia, PA

Meeting with the Supreme Court of Pennsylvania Regarding the Law Schools Work in Elder Justice

Justice Debra Todd, Mary Catherine Scott, Esquire and Grace W. Orsatti, Esquire

September 20 & 21, 2022

Office of Elder Justice in the Courts
Virtual Training

Fundamentals of Guardianship: What Family and Non-Professional Guardians Need to Know

Joan Krechmer and Keith Hinkel Jr.

September 23, 2022

Office of Elder Justice in the Courts
Virtual Training

Report Reviewer Training for Court Staff – Reviewing the Report of the Person

Senior Judge Paula Francisco Ott and Keith Hinkel Jr.

September 28, 2022

Montgomery County Bar Assoc. – Probate and Tax Section
Norristown, PA

Orphans' Court Matters Including Guardianship and Guardianship Reform

Judge Lois E. Murphy

October 11, 2022

Office of Elder Justice in the Courts
Virtual Training

Fundamentals of Guardianship: What Family and Non-Professional Guardians Need to Know

Joan Krechmer and Keith Hinkel Jr.

2022 ADVISORY COUNCIL TRAINING PROGRAMS AND EDUCATIONAL PRESENTATIONS (CONT.)

October 13, 2022
Office of Elder Justice in the Courts
Virtual Training
Report Reviewer Training for Court Staff – Reviewing the Inventory and Report of the Estate
Senior Judge Paula Francisco Ott and Keith Hinkel Jr.

October 19 & 20, 2022
Office of Elder Justice in the Courts
Virtual Training
Fundamentals of Guardianship: What Family and Non-Professional Guardians Need to Know
Joan Krechmer and Keith Hinkel Jr.

October 20, 2022
Pennsylvania Courts’ Judicial Education Department
Virtual Training
Alternatives to Guardianship
Judge Lois E. Murphy and Pam Walz, Esquire

October 21, 2022
NEPA Intergenerational Coalition Grandfamilies Conference
Wilkes-Barre, PA
Acknowledging the Important Role of Grandfamilies as Caregivers
Secretary of Aging Robert Torres

October 25, 2022
Training for Law Enforcement
Harrisburg, PA
Financial Exploitation of Seniors – Investigating Financial Exploitation of Seniors and Vulnerable Adults
Secretary of Aging Robert Torres

November 2, 2022
Office of Elder Justice in the Courts
Virtual Training
Fundamentals of Guardianship: What Family and Non-Professional Guardians Need to Know
Joan Krechmer and Keith Hinkel Jr.

November 4, 2022
Pennsylvania Ten County (Southeastern Region) Meeting
Harrisburg, PA
Presentation on the Widener Law Clinic and Dauphin County’s Pro Bono Guardian Monitor Program Partnership
Mary Catherine Scott, Esquire and Cherstin Hamel

November 9, 2022
Office of Elder Justice in the Courts
Virtual Training
Fundamentals of Guardianship: What Family and Non-Professional Guardians Need to Know
Joan Krechmer and Keith Hinkel Jr.

December 1, 2022
Office of Elder Justice in the Courts
Virtual Training
Fundamentals of Guardianship: What Family and Non-Professional Guardians Need to Know
Joan Krechmer and Keith Hinkel Jr.

December 13 & 14, 2022
Office of Elder Justice in the Courts
Virtual Training
Fundamentals of Guardianship: What Family and Non-Professional Guardians Need to Know
Joan Krechmer and Keith Hinkel Jr.





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FOR MORE INFORMATION, VISIT

www.pacourts.us/judicial-administration/court-programs/office-of-elder-justice-in-the-courts