

Chris Rosin

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Education

University of Oregon School of Law, Eugene, OR

Juris Doctorate

May 2009

Oregon State University, Corvallis, OR

BS in Political Science, Minor in Business, graduated cum laude

March 2005

Professional Experience

Adult Protective Services Specialist

LCOG Senior & Disability Services, Eugene, OR

April 2010-September 2015

- Investigated over 1000 allegations of abuse and neglect of adults 65 and older and persons with physical disabilities.
- Provided advocacy for the victims of abuse, including through assistance in obtaining specialized restrain orders, caregiving services, government benefits and other supports to help address their specific needs.

Deputy Public Guardian

The Oregon Public Guardian & Conservator Program (OPG), Salem, OR

September 2015 – September 2017

- Served as the first deputy public guardian for the state of Oregon's newly established public guardian program.
- Assisted in developing initial process and procedures for the new program.
- Investigated the need for guardianship for individuals referred to the program, and in appropriate case pursued filing for legal guardianship.
- Provided ethically principled, person-centered guardianship services to court appointed guardianship clients on caseload.

The Oregon Public Guardian

The Oregon Public Guardian & Conservator Program (OPG), Salem, OR

September 2017 – Present

- Director of the Oregon Public Guardian and Conservator Program, providing supervision for the deputy public guardians and other staff ensuring an ethically principled decision across the program.
- Continued development of the process and policies of the OPG program.
- Oversaw implementation of legislatively approved expansion of the program in 2018, 2021, 2023 and 2024, which have seen OPG grow from four employees in 2017 to seventeen by 2024.
- Oversaw development and launch of the OPG volunteer public guardian program in 2022.

Service and Leadership

Pi Sigma Alpha – Political Science Honor Society, OSU Chapter

September 2003 – March 2005

- National Political Science honor society.
- Chapter President September 2004 – March 2005.

Lane County Multi-Disciplinary Team (MDT)

September 2010 – September 2015

- Work with a collaborative team made up of local law enforcement, abuse investigators, local hospitals, and disability services organizations to address complex cases of elder and disabled abuse where law enforcement is involved.
- Facilitator for team meetings January 2011 – September 2015.

Working Interdisciplinary Network of Guardianship Stakeholders (WINGS)

October 2017 - Present

- Work with judges, attorneys, guardians, advocates, and other professionals to improve guardianship law and practice in Oregon.

Older Adult Behavioral Health Initiative Advisory Committee (OABHIAC)

November 2017 - Present

- Work with other advocates to review the work done by the Older Adult Behavioral Health Initiative and provide advice.

State Protective Proceedings Advisory Committee (SPPAC)

September 2023 - Present

- Work with attorneys, judges, guardians, court visitors, court staff and advocates to provide advice to the state judiciary department on needed changes to guardianship and court practice.

Oral Presentations

Have provided over a dozen professional presentations across my career on topics including, protective services and adult abuse, mandatory reporting of abuse, guardianship, and public guardianship.

Audiences for presentations have included but are not limited to,

- Junction City Police Department, "Basics of Adult Protective Services," Junction City, OR, 2013
- Eugene Police Department, "Basics of Adult Protective Services," Eugene OR, 2014
- Lane County District Attorney's Office, "Elder Abuse Reporting CLE," Eugene OR, 2015
- LCOG No Excuse for Elder Abuse Annual Conference, "Guardianship and Public Guardianship in Oregon" 2018
- Guardian & Conservator Association of Oregon Annual Conference, "Updates on Public Guardianship in Oregon" 2018
- OABHI Annual Healthy Aging Conference "Basics of Guardianship and Public Guardianship in Oregon" 2019
- Governor's Commission on Senior Services "Update on Public Guardianship" 2022
- Annual PSRB Conference "Oregon Public Guardian" 2022
- Brain Injury Association of Oregon Annual Conference "Guardianship and OPG basics" 2023
- American Case Management Association, Oregon Chapter Annual Conference "Basics of Guardianship and OPG" 2023

In addition to the above presentations, I have also prepared and provided in-person testimony and recommendations to the Oregon Legislature at least a dozen times since 2017, on topics including guardianship reform, public guardianship, veterans' affairs, homelessness, complex hospital discharge delays and mental illness.

CURRICULUM VITAE
OF
DEBORAH J. JAMESON

5302 Pacific Ave
Tacoma WA 98408
253-475-8600

EDUCATION

Juris Doctor Degree 1986
University of San Diego, School of Law

Bachelor of Arts 1979
Pennsylvania Western University (formerly Edinboro College)

LICENSES

California Bar Association #126563, inactive
Washington State Bar Association #28261
Certified Professional Guardian/Conservator #20828

RELEVANT EXPERIENCE

05/21 TO PRESENT	CERTIFIED PROFESSIONAL GUARDIAN	PACIFIC GUARDIANSHIP SERVICES TACOMA, WASHINGTON
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Visiting clients for Certified Professional Guardian/Conservator Agency in compliance with Standards of Practice. Participating in discussions about client issues with Directors and case managers. Preparing reports to the Court re guardian clients.

10/11 TO PRESENT	ASSOCIATE ATTORNEY	NEIL & NEIL, P.S. TACOMA, WASHINGTON
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Representing professional and lay guardians/conservators, trustees, agents under Durable Powers of Attorney, representing attorneys in WSBA disability proceedings, acting as a Court Visitor, advocating for Respondents in guardian/conservatorship cases, working with trust and probate issues, mediating cases as requested.

10/09 TO 10/11 24 MONTHS	GUARDIAN PROGRAM COORDINATOR	ADMINISTRATIVE OFFICE OF THE OLYMPIA, WASHINGTON
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Responsible for staffing the Certified Professional Guardian/Conservator Board and supporting its committees—Education, Standards of Practice, Ethics Advisory,

Regulations, and Applications. Dealt with calls from applicants regarding process and evaluation standards. Developed regulations and assisted committees with identifying needed regulation changes. Prepared materials, agenda, minutes, and presentations for Board meetings. Acted as a liaison between the Board and the approximately 274 certified professional guardians/conservators. Assisted in preparation of training for judicial officers on guardianship topics. Continued responsibility to act as the Guardian Investigator. Prepared materials for AAG in Administrative Hearings on guardianship complaints.

11/07 TO 10/09 COURTS 23 MONTHS	GUARDIAN INVESTIGATOR	ADMINISTRATIVE OFFICE OF THE OLYMPIA, WASHINGTON
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Investigated grievances regarding Certified Professional Guardians, including: maintaining case files, conducting confidential investigations, preparing memoranda regarding the investigation, negotiating settlement agreements, drafting complaints, and tracking the disposition of cases. Responsible for working with staff and the Board in developing the disciplinary process. Developed monitoring programs for guardians and provided training on guardian discipline. Involved with the training of Certified Professional Guardians through the University of Washington, both as a course developer and as an instructor of two sessions.

3/03 TO 11/07 56 MONTHS	TITLE 11 GUARDIAN AD LITEM	KING COUNTY SUPERIOR COURT SEATTLE, WASHINGTON
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Acted as a neutral investigator for the Court making recommendations about whether a person is incapacitated and in need of a guardian. Duties included: interviewing the alleged incapacitated person and other interested parties, preparing pleadings, writing reports, making presentations in court, appearing as an expert witness, investigating alternatives to guardianship, keeping track of statistics, calendaring, etc.

TRAINING ACTIVITIES

- 2013 coordinated 12th Annual Guardianship Seminar for Tacoma-Pierce County Bar Association
- 2014 presentation with Christopher Neil at Bridge Builders Seminar on “Guardianship Case Studies: How to avoid a grievance and what to do when a grievance is filed.”
- 2014 presentation at WAPG Training with Christopher Neil “CPG Board Discipline: What You Need to Know”
- 2014 coordinated 13th Annual Guardianship Seminar for TPCBA
- 2016 presentation at training for Vancouver Bar Association Guardianship Section “Between the Devil and the Deep Blue Sea”

2016 presentation with Kerry Brink on “Pro Bono Clinic and Guardianship Forms” and with Steven Lust on “Due Process Rights in a Guardianship Proceeding” for 15th Annual Guardianship Seminar for TPCBA
2019 coordinated 18th Annual Guardianship Seminar for TPCBA
2020 presentation on “Emergency Guardianships and Conservatorships Under the UGA” for the 19th Annual Guardianship Seminar for TPCBA
2022 coordinated 21st Annual Guardianship Seminar for TPCBA
2022 presentation with J. Alece Cox on “Do They, or Don’t They, Have Capacity? Ethical Considerations” for 21st Annual Guardianship Seminar for TPCBA
2023 presented at Kitsap County Training for Court Visitors with Angela Carlson-Whitley on “Respondent’s Due Process, Lesser Restrictive Alternatives, and OPAs”
2023 coordinated training for WAPG’s Fall Conference
2023 presented at WAPG Fall Conference with Christopher Neil, Christopher Fast, and Karen Newland “Substituted Judgment: Medical Decision-Making”
2024 coordinated training for WAPG’s Spring Conference
2024 presented at WAPG Spring Conference with Christopher Neil, Darryl Lynch, and Denise Meador “The Ethics of Investing for Your Client”
2024 presented at Kitsap County Training for Court Visitors with Angela Carlson-Whitley on “What makes a good investigation?”

VOLUNTEER ACTIVITIES

Monthly Guardianship/Conservatorship Workshop to assist low income clients with reporting requirements through the Tacoma Pro Bono Program

Volunteer Mediator with the Thurston County Dispute Resolution Center

PROFESSIONAL MEMBERSHIPS

Member of Tacoma/Pierce County Bar Association Guardianship Committee since 2011.
Co/Chair or Chair of the Committee in 2013, 2014, 2019, and 2022

Member of the Washington Association of Professional Guardians (WAPG) since 2016
Board member of WAPG since 2023

Member of the National Guardianship Association since 2021

Member of King County Bar Guardianship and Elder Law Section

Member of the Elder Law Section of the Washington State Bar

HONORS AND AWARDS

2016 Service to the Legal Profession Award, Tacoma-Pierce County Bar Association
2023 Community Service Award, Tacoma-Pierce County Bar Association with Peter Haroldson

PUBLICATIONS

May/June 2022 Pierce County Lawyer, "Guardianship – What's New?"

March/April 2021 Pierce County Lawyer, "We do Care a Lot"

CSA Journal, Number 74, Vol. 2, 2019, "Cognitive Abilities are a Moveable Feast" with Don Desonier

Erik Sabaitis

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Education

Western Michigan University, Kalamazoo, MI
MS in Engineering Management
2000

December

Michigan State University, East Lansing, MI
BS in Engineering
1993

August

Work History

BFA Software, LLC

June 2012-

Present

Owner and Lead Developer

BFA Software is a full-service custom software development organization and the creators of AIM (Advocate Information Management) Software. AIM is a robust, feature-rich system, designed and built with the leaders in the Guardianship and Advocacy industry. This platform provides a traditional rich client installation, web portal, and mobile integration of client information. All client information is tracked and processed from demographic, clinical, financial, and reporting for probate courts, social security, and Veterans Administration. AIM is continuously improving with bi-monthly updates and new features.

ZetaOne Solutions Group, LLC

2001-June

2012

Partner and Lead Developer

ZetaOne Solutions is a computer services and consulting organization that also provides custom application development. During my tenure I developed the AIM application along with custom applications that still are in use to operate multiple companies from Long Term Nursing Care Facilities and Inject Molding Facilities to Home Insurance Companies.

Maxitrol Company, Colmer Division

August 1993-

2001

Industrial Engineer, Plant Manager

Overseeing 235 employees, production of 4 million components and \$35M in sales annually. Implemented quality management system (QMS) into all departments and ensured acceptance to ISO 9001 audit and approval. Monitored each department to ensure adherence to

requirements. Responsible for plant and production line layouts during expansion and continued production growth.

Professional Affiliations/Memberships

Michigan Guardianship Association

Legislative Committee Co-Chair

December 2015-Present

Lead a group that organized legislative efforts regarding funding of guardianship services for indigent and long-term care cases. Coordinated annual Capital Day legislative events. Creation of database tools for member legislative efforts, reporting and analysis. Coordinated outreach legislative partnerships with key groups. Worked with special task force related to Elder Abuse and legislative reform.

Board Member and Treasurer

February 2016-Present

Worked with board members to provide two annual educational conferences that provide continuing education credits related to guardianship and conservatorship in Michigan. Created budgets and forecasts for long-term stability of organization. Coordinated grass roots membership drives.

Member

2004 -

Present

Actively supported the association by attending bi-annual conferences and associated presentations as well as providing support through vendor program.

Matteson Lake Association

Board Member and Treasurer

Worked with board and Water Quality committee to submit grant proposals for Watershed Management Plan for Little Swan Creek watershed.

Conference Presentations

Michigan Guardianship Associations Fall Conferences October 2019, 2022, 2023
Probate Court Form Training – Case Notes, Medical History, Interested Parties, and Address
Histories and Integration Annual Condition of Ward of
Conservator Inventory, Bank Reconciliation, and Annual Accountings

Conference Attendance

Michigan Guardianship Association semi-annual education conferences. 2004-Present

National Guardianship Association Annual Conference
Years

Multiple

CollabsSphere/Lotussphere/HCL Factory Tours

2004-Present

Florida Guardianship Association Annual Conference

Texas Guardianship Association Conference

Ohio Guardianship Association Conference

Indiana Guardianship Association Conference

Nathan Danielson

Sr. Director Supported Decision Making, Guardianship Options and Pooled Trust
Nathan.Danielson@lssmn.org

Education

Minnesota State University – Mankato 2007
BA – International Relations

Minnesota State University – Mankato 2006
Certificate of Non-Profit Leadership

Cannon Trust School 2021

Honors and Awards

YMCA Thrive Award winner for Service and Development of Sioux YMCA Initiative 2013

Green Ribbon Initiative Award Winner Eagan YMCA Community Engagement 2019

Professional Activities

Executive Director – YMCA of the North 2008-2020

Director Pooled Trust LSS of MN 2020-2023

Sr. Director Support Decision Making, Guardianship Options 2023-Current

Service and Leadership

City of Maplewood – Human Right Commission Chair 2013 - 2015

Eagan Rotary Board Member 2019-2021

Oral Presentations

Separation of Duties/Best Practices – Alliance of Pooled Trust – National Monthly Education Series 2024

My First Special Needs Trust – Minnesota CLE – Elder Law Institute 2022

Pooled Trust and Able Accounts – Minnesota Social Service Association – Annual Conference 2021/2022

How to Scale your Business – National Plan Alliance – National Conference 2021

SALLY ANN HOLEWA

1308 N 20TH STREET

BISMARCK, ND 58501

SUMMARY OF PROFESSIONAL EXPERIENCE

North Dakota State Court Administrator

10/05 – present

State of North Dakota

Bismarck, ND

Responsible for all non-judicial functions of a unified state court system serving a population of 664,000, with a budget of \$84 million and a staff of 351 employees plus 57 additional contract employees

Develop and administer the budget for the North Dakota court system

Serve as spokesperson for the North Dakota court system, including appearing before the legislature and responding to media requests

Develop statewide policy and procedures for implementing statutory mandates and administrative rules of court

Oversee development of statewide human resources management policies and practices

Oversee development of statewide information and technology policies and standards

Oversee implementation of judicial, professional, and staff education requirements

Responsible for building and maintaining professional and collaborative relationships with executive branch agencies

Establish and monitor performance measures for the North Dakota courts

Responsible for recruitment, hiring, training, evaluation, assignment, discipline and discharge of all non-judicial employees of the Office of the State Court Administrator

Hire and supervise unit trial court administrators

Serve on the Executive Board of the Criminal Justice Information Sharing Project and on the State Information Technology Advisory Committee

Trial Court Administrator – Unit 3, North Dakota Judiciary

4/04 – 10/04

State of North Dakota

Bismarck, ND

Responsible for all non-judicial functions of the 20 District Courts within the South Central and Southwestern Judicial Districts, serving a population of 167,000, with a budget of \$11 million and a staff of 78 employees plus 21 contract employees

Develop and administer the budgets for the district office and all twenty district courts

Responsible for the facilities management of all courts within the district

Develop local policy in response to statutory mandates and administrative rules of court

Responsible for recruitment, hiring, training, evaluation, assignment, discipline and discharge of all non-judicial employees of the courts within the district
Responsible for building and maintaining professional and collaborative relationships with local county agencies and policy groups
Assist the Presiding Judges in the development and implementation of a district wide rotation schedule and case assignment plan
Responsible for ensuring adequate judge coverage for all twenty counties
Responsible for coordinating the development of consistent policies, procedures and practices throughout the districts
Responsible for identifying areas of potential conflict between court administration, county agency or judicial practices, researching alternatives and negotiating consensus to resolve conflicts
Responsible for managing jury services and court-appointed counsel programs
Responsible for overall caseload management for all twenty counties
Respond to media requests for information

Committee Assignments

North Dakota Supreme Court Technology Committee
North Dakota Supreme Court Caseload Management Committee
South Central Judicial District Drug Court Advisory Board
Member, The Centre (transitional housing for North Dakota Prisoners) Community Relations Board

Deputy Court Administrator

10/02 - 4/04 Ingham County Lansing, Michigan

Deputy Court Administrator-General Trial Division/General Court Operations for the 30th Circuit Court, a court of specialized jurisdiction including civil cases valued at over \$25,000, domestic cases, juvenile cases and felony-level criminal cases, serving a population of 320,000 people, with a budget of \$7 million and a staff of 380 employees
Assist Circuit Court Administrator with all aspects of administering the Circuit Court
Responsible for managing jury services, pre-trial services, court-appointed counsel programs and alternative dispute resolution programs
Responsible for overall caseload management
Develop local policy in response to statutory mandates and rules of court
Serve as liaison to the local district courts and probate court
Respond to media requests for information

Special Assignments

E-Filing Pilot Project
54A District Court Drug Court Design and Implementation Team

Court Administrator

12/96-10/02 Polk County Crookston, Minnesota

Administrative head of the District Court in Polk County, a court of general jurisdiction including civil, criminal, traffic, family, probate, juvenile and conciliation court, serving a population of approximately 34,000 people

- Develop and administer the local court budget
- Responsible for the financial aspects of local court operations
- Develop local policy in response to statutory mandates, rules of court and Ninth Judicial District policies
- Responsible for recruitment, hiring, training, evaluation, assignment, discipline and discharge of all non-judicial employees of the Court Administrator's office
- Responsible for building and maintaining professional and collaborative relationships with local county agencies and policy groups

Local Courts Coordinator

Assisted the Chief Judge in the development and implementation of a five-county/five-judge rotation schedule and case assignment plan

Responsible for ensuring adequate judge coverage for all five counties

Responsible for coordinating the development of consistent policies, procedures and practices throughout the five county rotation

Responsible for identifying areas of potential conflict between court administration, county agency or judicial practices, researching alternatives and negotiating consensus to resolve conflicts

Guardian Ad Litem Coordinator

Responsible for recruitment, contracting, assignment, evaluation and discipline of guardians ad litem for Polk, Mahanomen, Norman, Red Lake, Marshall, Kittson and Pennington Counties

Committee Assignments

Supreme Court Negotiating Team (engage in contract negotiations with AFSME union on behalf of the Minnesota State Court Administrator's Office)

General Rules Committee (Statewide committee to develop and modify the Rules of Court for all types of procedures)

Legislative Committee (Minnesota Association of Court Administrator's committee to recommend the creation or modification of Minnesota laws)

Technology Committee (Minnesota Association of Court Administrator's committee to review technological innovations in the courts)

Deputy Court Administrator

1/89-11/96 Benton County Foley, Minnesota

Worked in the areas of probate, civil, traffic, criminal, juvenile, conciliation court and family, and performed courtroom clerk duties

Assistant Jury Commissioner for Benton County

Conducted Probate Training seminars for 7th Judicial District

Assisted in the editing and updating of the Minnesota Association of Probate Registrars'

"Informal Probate Manual," 2nd edition

Conducted Diversity Training as part of New Employee Orientation for 7th Judicial District

Education: 2006 Fellow of the Institute of Court Management
National Center for State Courts Williamsburg, VA

2005 M.P.A., Public Administration
University of North Dakota Grand Forks, ND

1987 B.A., Political Science, Magna Cum Laude
St. Cloud State University St. Cloud, Minnesota

Awards: Institute for Court Management Star Award for Excellence in the
Advancement of Court Administration (2017)
Warren E. Burger Award for Excellence in Court Administration (2021)

Member: Conference of State Court Administrators
National Association of Court Managers

American Society for Public Administration