



NEWS RELEASE

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JUDICIAL COUNCIL OF
CALIFORNIA
ADMINISTRATIVE OFFICE
OF THE COURTS
Public Information Office
455 Golden Gate Avenue
San Francisco, CA 94102-3688
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State Task Force to Hold Public Hearings On Probate Conservatorships in Trial Courts

Hearings Scheduled in Los Angeles, San Francisco; Goal is to Improve Oversight of Cases in State Courts

San Francisco—The Judicial Council's new Probate Conservatorship Task Force will hold two public hearings later this month as it begins an in-depth study on how to improve the management and oversight of conservatorships in the California trial courts.

- The first hearing will be held from 10:30 a.m. to 3:30 p.m. on Friday, March 17, in the Ronald Reagan State Building, Auditorium, First Floor, 300 South Spring Street, Los Angeles.
- The second hearing will be held from 10:30 a.m. to 3:30 p.m. on Friday, March 24, in the Hiram Johnson State Office Building, Auditorium, Lower Level, 455 Golden Gate Avenue, San Francisco.

Appointed by Chief Justice Ronald M. George, the task force is charged with making recommendations for reforms and improvements in the overall administration of probate conservatorships. The task force is convening these public hearings to seek broad input from stakeholders with knowledge and expertise about the conservatorship system. The 16-member task force is chaired by Administrative Presiding Justice Roger W. Boren of the Court of Appeal, Second Appellate District (Los Angeles).

At each public hearing, the task force will hear testimony from the public and a wide range of speakers including judges, court investigators, public and private conservators, attorneys and legal advocacy groups, and law enforcement representatives. Topics at the hearings will include:

- A fresh look at temporary conservatorships.
- How to increase court oversight and accountability in permanent conservatorships.
- Improving collaboration with key justice system partners.
- Innovative approaches to handling conservatorship cases.

The agendas for both hearings, which are open to press and public, are attached.

The Judicial Council is the policymaking body of the California courts, the largest court system in the nation. Under the leadership of the Chief Justice and in accordance with the California Constitution, the council is responsible for ensuring the consistent, independent, impartial, and accessible administration of justice. The Administrative Office of the Courts carries out the official actions of the council and promotes leadership and excellence in court administration.

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*Chief Justice of California
Chair of the Judicial Council*

WILLIAM C. VICKREY
Administrative Director of the Courts

PROBATE CONSERVATORSHIP TASK FORCE

[www.courtinfo.ca.gov/jc/tflists/
/probcons.htm](http://www.courtinfo.ca.gov/jc/tflists/probcons.htm)
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HON. ROGER W. BOREN
Chair

Hon. S. William Abel

Hon. Aviva K. Bobb

Hon. Don Edward Green

Hon. Donna J. Hitchens

Hon. Frederick Paul Horn

Hon. Steven E. Jahr

Hon. Laurence Donald Kay (Ret.)

Ms. Gina L. Klee

Hon. William H. Kronberger

Dr. Margaret Little

Hon. Sandra Lynn Margulies

Ms. Sandy Sanfilippo

Mr. Alan Slater

Ms. Pat Sweeten

Hon. James Michael Welch

TASK FORCE LIAISONS

Judicial Council of California

Hon. Barbara J. Miller

Office of the Attorney General

Mr. Alfredo Terrazas

Senate Judiciary Committee

Ms. Gloria Ochoa

TASK FORCE STAFF

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Tel 415-865-7815

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PUBLIC HEARING

March 17, 2006
10:30 a.m.–3:30 p.m.

Auditorium

Ronald Reagan State Building
300 South Spring Street
Los Angeles

Improving the Management and Oversight of Probate Conservatorship Cases in California Trial Courts

AGENDA

I. Welcome and Opening Remarks (10:30–10:45)

- Hon. Roger W. Boren, Administrative Presiding Justice of the Court of Appeal, Second Appellate District
Chair, Probate Conservatorship Task Force

II. Improving the Practices and Procedures of Probate Conservatorship Cases—*Part 1: A Fresh Look at Temporary Conservatorships* (10:45–11:45)

- Richard Lambie, Practicing Professional Fiduciary
Former president, Professional Fiduciary Association of California
- Jean Farley, Chief Deputy Public Defender, Ventura County
California Public Defenders Association
- Jennifer Henning, Executive Director, County Counsels'
Association of California
- Eric Gelber, Managing Attorney, Protection and Advocacy,
Incorporated

Lunch break (11:45–12:45)

III. Improving the Practices and Procedures of Probate Conservatorship Cases—*Part 2: How to Increase Court Oversight and Accountability in Permanent Conservatorships* (12:45–2:00)

- Margaret G. Lodise, Trusts and Estates Section, State Bar of California
- Yolande Erickson, Staff Attorney, Bet Tzedek Legal Services
- Heather Tackitt, Mediator and Investigator, Superior Court of Madera County
California Association of Superior Court Investigators
- Hon. Marjorie Laird Carter, Judge, Superior Court of Orange County
California Judges Association

IV. Improving Collaboration with Key Justice System Partners (2:00–3:00)

- Peggy Osborn, Program Manager, Elder and Dependent Adult Abuse Prevention
Office, Attorney General of the State of California
- Jim Provenza, Special Assistant District Attorney, Los Angeles County District
Attorney's Office
California District Attorneys Association
- Terry Flynn, Former Chief Deputy Public Conservator/Public Guardian,
Riverside County
California Association of Public Administrators, Public Guardians, and Public
Conservators
- Dave Kochen, Human Services Administrator, Los Angeles County Adult
Protective Services
- Lillie Franklin, Detective Supervisor, Los Angeles Police Department

V. Public Testimony (3:00–3:30)

VI. Concluding Remarks—Justice Roger W. Boren (3:30)



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PUBLIC HEARING

March 24, 2006

10:30 a.m.–3:30 p.m.

Milton Marks Auditorium, Lower Level

Hiram W. Johnson State Building

455 Golden Gate Avenue

San Francisco

Improving the Management and Oversight of Probate Conservatorship Cases in California Trial Courts

AGENDA

I. Welcome and Opening Remarks (10:30–10:45)

- Hon. Roger W. Boren, Administrative Presiding Justice of the Court of Appeal, Second Appellate District
Chair, Probate Conservatorship Task Force

II. Improving the Practices and Procedures of Probate Conservatorship Cases—*Part I: A Fresh Look at Temporary Conservatorships* (10:45–11:45)

- Russ Marshall, Practicing Professional Fiduciary
Former president, Professional Fiduciary Association of California
- Barry Melton, Public Defender, Yolo County
California Public Defenders Association
- Jennifer Henning, Executive Director, County Counsels'
Association of California
- Naomi Karp, Senior Policy Advisor, Public Policy Unit, AARP

Lunch break (11:45–12:45)

IV. Improving the Practices and Procedures of Probate Conservatorship Cases—*Part 2: How to Increase Court Oversight and Accountability in Permanent Conservatorships* (12:45–2:00)

- Peter S. Stern, Trusts and Estates Section, State Bar of California
- Patricia McGinnis, Executive Director, California Advocates for Nursing Home Reform
- James Locke, Probate Supervisor, Superior Court of Sacramento County
California Association of Superior Court Investigators
- Richard L. Narver, Assistant Public Guardian/Administrator, Yolo County
California Association of Public Administrators, Public Guardians, and
Public Conservators
- Hon. F. Clark Sueyres, Judge, Superior Court of San Joaquin County
California Judges Association

V. Innovative Approaches to Handling Conservatorship Cases – A Review of Model Programs and Best Practices (2:00 – 3:00)

- Hon. Dorothy L. McMath, Commissioner, Superior Court of San Francisco County
- Mary Joy Quinn, Director of Probate, Superior Court of San Francisco County
- Brenda K. Uekert, Ph.D., Senior Research Associate, National Center for State Courts

V. Public Testimony (3:00–3:30)

VI. Concluding Remarks—Justice Roger W. Boren (3:30)