

THE EIGHTH JUDICIAL CIRCUIT OF FLORIDA  
ADMINISTRATIVE ORDER NO. 7.11

**GUARDIANSHIP MONITORING PROGRAM**

**WHEREAS**, the circuit court has jurisdiction over all guardianship cases in this circuit, and has authority to require the guardian to appear before the court at its discretion on any matter relating to the guardianship or to appoint court monitors on its own motion, *see* §§744.107, 744.372, 744.3735, and 744.477, Florida Statutes; and

**WHEREAS**, the National Guardianship Monitoring Program is a cooperative effort with the American Association of Retired Persons (AARP), which includes uniform procedures and standards, and which greatly strengthens the court's monitoring capabilities; and

**WHEREAS**, the Eighth Judicial Circuit recognizes the need to codify the procedures being followed in the existing program that currently monitors guardianship cases and to improve cooperation between the court and community services for the guardianship of wards; and

**WHEREAS**, the monitoring program is to be staffed by volunteers, requiring a volunteer management function for the court staff; It is therefore

**ORDERED** that

**I. PURPOSE**

The guardianship monitoring program is designed to provide meaningful monitoring of each guardianship in order to provide maximum protection for the ward. Being a guardian can be stressful and often is a thankless duty. The monitoring program provides support for the guardian, and informs the guardian of community resources available to the guardian to relieve some of the stress and to show the court's appreciation for the work done by the guardian.

## **II. PROGRAM COORDINATOR**

- A. The program coordinator is charged with ensuring that this program provides a meaningful method for the monitoring of guardianships, including providing protection for each ward.
- B. The program coordinator will directly oversee the guardianship monitors and their caseload.
- C. The program coordinator will adapt the court's existing administrative procedures to help in the development of effective monitoring standards.

## **III. RECRUITMENT OF VOLUNTEERS**

- A. The Program Coordinator will establish adequate procedures for the recruitment, and selection and management of volunteer monitors.
- B. The program coordinator will accept and train as volunteers those persons who prove to be productive and of high quality.
- C. The program coordinator will also assign and schedule volunteers, arrange initial and ongoing training of volunteers, provide the volunteers with the necessary forms to track the progress of cases, maintain volunteer records, conduct periodic evaluations of the program, report the results of the program's efforts, and act as a liaison with community agencies.
- D. The duties of the program coordinator are not limited to the above delineated description, but include any practical means effective to realize any need of the program.

## **IV. VOLUNTEERS' DUTIES AND POSITIONS**

- A. Duties. Under the direct supervision of the program coordinator, the volunteers will be charged with the following duties:
  - 1. Visit wards currently under guardianship, making sure that they are receiving good care and that the guardianship is still necessary.
  - 2. Research cases to locate guardians and wards.

3. Assist with updating guardianship records and maintaining current information about each ward
4. Audit accountings that are not required to be audited by the Clerk
5. Refer guardians to appropriate community services.

**B. Positions and Specific Duties**

1. **Visitors.** The visitor will personally visit the ward and speak to the guardian, the care giver or others involved with the ward's care, and prepare a written report to the court with recommendations.
2. **Auditors.** The auditor will review accountings and prepare a written report for the court.
3. **Researchers.** Researchers will prepare cases for assignment to visitors and assist court staff in culling inactive files, and obtain current address and phone information for guardians and wards and develop procedures to regularly update this information.

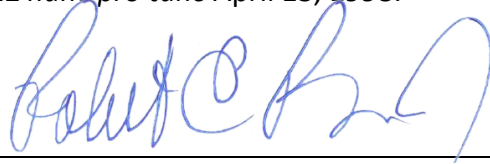
**V. PROCEDURES**

- A. Wards will be visited on an annual basis as resources allow.
- B. Reporting forms must include information regarding the ward's living situation, health care and relationship with the guardian.
- C. Researchers will conduct research on an as-needed basis and as resources allow.
- D. Audits will be conducted on simplified accountings or VA accountings as needed and as resources allow.
- E. The program coordinator will review each report filed by visitors, researchers and auditors and recommend remedial action, where necessary. If such a recommendation is made, the court will take appropriate action, which may include, but is not limited to sending a simple letter or

placing a telephone call to the guardian, issuing a compliance order, or scheduling a status conference.

This order renumbers and reformats prior Administrative Order No. 6.0930 entitled "Guardianship Monitoring Program."

**ORDERED ON** this 5<sup>th</sup> day of October, 2012 *nunc pro tunc* April 13, 1998.

A handwritten signature in blue ink, appearing to read "Robert E. Roundtree, Jr.", written over a horizontal line.

Robert E. Roundtree, Jr., Chief Judge