



North Carolina Department of Health and Human Services  
Division of Social Services

2405 Mail Service Center • Raleigh, North Carolina 27699-2405  
Courier 56-20-25 Fax 919-715-0023

Michael F. Easley, Governor  
Carmen Hooker Odom, Secretary

Pheon E. Beal, Director  
(919) 733-3055

September 5, 2002

Dear County Director of Social Services, Area Mental Health Director, Local Health Department Director and County Department on Aging Director

**ATTENTION: Adult Services Staff**

**Subject: Training for Disinterested Public Agent Guardians**

The NC Division of Social Services is pleased to offer basic guardianship training, **Guardianship: A Systematic Approach**, in four sites across the state during FY 2002-03. These two-day workshops are led by an attorney, a clerk of superior court, Division of Social Services staff and local human services professionals. The workshops are designed for directors and assistant directors of county departments of social services, area mental health authorities, local health departments, and county departments on aging who serve as disinterested public agent guardians. Program managers, supervisors, social workers, case managers, and others who provide guardianship services will also find these workshops beneficial.

The focus of these workshops is in keeping with North Carolina General Statute 35A and Department of Health and Human Services (DHHS) policy requirements that all disinterested public agents receive training on the powers and responsibilities of a guardian. Information on guardianship law, DHHS policy requirements and practice guidelines related to guardianship service provision will be presented. An agenda for the workshops is attached.

The dates and locations for the workshops are listed below. Each workshop will begin at 9:00 AM and will end at 4:30 PM on both days. Check-in will be at 8:30 AM.

**Workshop Dates and Locations**

**December 12 – 13, 2002**

Randolph County Public Library  
201 Worth Street  
Asheboro, NC

**February 6 – 7, 2003**

Northampton County Health Department  
1237 N. Church Street  
Jackson, NC

**April 10 – 11, 2003**

Environmental Health Annex  
1233 N. Main Street  
Waynesville, NC

**April 22 – 23, 2003**

Duplin County Department of Social Services  
423 N. Main Street  
Kenansville, NC

Dear Director  
Subject: Guardianship Training  
September 5, 2002  
Page 2

**Participants must pre-register to attend these workshop, although there is no registration fee requirement. Registration information is attached.** There is no limitation on the number of agency staff who may attend a workshop or on the workshop location they may attend. Please duplicate the enclosed registration information as necessary if more than one person from your agency plans to attend a workshop.

**Registration forms must be returned at least two weeks in advance of the workshops.** It is important that all information on the registration form be completed. Substitutions may be sent for staff who have registered for a particular workshop and are unable to attend. Persons who register for the workshops will be sent a confirmation letter, directions to the workshop site, and when available, suggestions about lodging accommodations.

Please share this information with the appropriate staff and mark these dates on your calendars. If you have questions, please contact Rosalyn Pettyford, Guardianship Program Consultant at (919) 733-3818 or for county departments of social services, your Adult Programs Representative.

Sincerely,

A handwritten signature in black ink, appearing to read "John T. Tanner". The signature is fluid and cursive, with the first name "John" being the most prominent.

John T. Tanner, Chief  
Adult and Family Services Section

Attachment

JTT: rp

AFS-10-2002

**Guardianship: A Systematic Approach Training Registration Form**  
 (An agenda follows this registration form)

**To register complete the form below and mail or fax to:**

Monica Nealous  
 NC Division of Social Services  
 Adult and Family Services  
 325 North Salisbury Street  
 2405 Mail Service Center  
 Raleigh, NC 27699-2405

Fax: 919-715-0023  
 Phone: 919-733-3818

**You must pre-register**, as space may be limited at each location.

Name: Ms./Mr./Dr. \_\_\_\_\_  
 Home Phone:\*( ) \_\_\_\_\_ SSN:\*\* \_\_\_\_\_  
 Job Title: \_\_\_\_\_  
 Agency: \_\_\_\_\_  
 Work Phone:( ) \_\_\_\_\_ Fax:( ) \_\_\_\_\_  
 Work Mailing Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Courier #: \_\_\_\_\_  
 County: \_\_\_\_\_  
 E-Mail Address: \_\_\_\_\_  
 Program Area: \_\_\_\_\_

\*Home phone requested in event of last minute postponement due to impending severe weather.

\*\*Social Security Number is requested for internal record keeping purposes only.

**↓ Please check (✓) the Workshop Location and Date you are registering for:**

Asheboro, NC (Randolph County Public Library)	December 12 – 13, 2002 <i>(register by November 22, 2002)</i>
Jackson, NC (Northampton County Heath Department)	February 6 – 7, 2003 <i>(register by January 17, 2003)</i>
Waynesville, NC (Environmental Health - Annex 2)	April 10 – 11, 2003 <i>(register by March 20, 2003)</i>
Kenansville, NC (Duplin County DSS)	April 22 - 23, 2003 <i>(register by April 2, 2003)</i>

Please bring a copy of the Guardianship Manual (Volume V, Chapter VIII) with you. If you do not have a manual, one can be mailed to you by contacting the Adult and Family Services Section at (919) 733-3818 at least 10 working days in advance of the training. Volume V, Chapter VIII is also available on the Internet at: <http://info.dhhs.state.nc.us/olm/manuals/dss/afs-09/man/index.htm>

**Note:** Refreshments will not be provided at the scheduled breaks. Participants are welcome to bring their own snacks and beverages to the workshop. Some of the workshop facilities have snack and beverage machines available.

# **GUARDIANSHIP: “A Systematic Approach”**

## **AGENDA**

### **DAY ONE**

<b>8:30 AM</b>	<b>Check-In</b>
<b>9:00</b>	<b>Welcome/Introductions</b>
<b>9:15</b>	<b>Introduction to Guardianship</b>
<b>10:00</b>	<b>Alternatives to Guardianship</b>
<b>10:30</b>	<b>BREAK</b>
<b>10:45</b>	<b>Guardianship Services</b>
<b>12:00</b>	<b>LUNCH (On Your Own)</b>
<b>1:30</b>	<b>Legal Proceedings</b>
<b>2:45</b>	<b>BREAK</b>
<b>3:00</b>	<b>Legal Proceedings (cont.)</b>
<b>4:30 PM</b>	<b>ADJOURN</b>

### **DAY TWO**

<b>8:30 AM</b>	<b>Check-In</b>
<b>9:00 AM</b>	<b>Legal Proceedings</b>
<b>10:45</b>	<b>BREAK</b>
<b>11:00</b>	<b>Legal Proceedings (Skills Practice)</b>
<b>12:00</b>	<b>LUNCH (On Your Own)</b>
<b>1:30</b>	<b>Role &amp; Responsibilities of the Public Agent Guardian</b>
<b>2:45</b>	<b>BREAK</b>
<b>3:00</b>	<b>Role &amp; Responsibilities (cont.)</b>
<b>4:00</b>	<b>Wrap Up</b>
<b>4:30 PM</b>	<b>ADJOURN</b>