



Spokane County Superior Court

Title 11 GAL / Court Visitor

Mandatory Annual Training Agenda

October 28, 2022

BACK TO BASICS

- 8:00 – 8:15 **Check-in**, Housekeeping. Sign-in and pick-up handouts
Welcome – Brent Stanyer and Judge Anderson
- 8:15 – 9:15 **“Best Practices when Investigating”** Presenter: Sharon Saito
- 9:15 – 10:15 **“Alternatives to Guardianship – A Statutory Perspective v. Practical Application”**
Presenters: Judge Rachelle Anderson, Spokane County Superior Court and
Lynda Clark, Certified Professional Guardian, Safe Haven Guardianship Agency
- 10:15-10:30 Transition Break
- 10:30 – 12:00 **“Overview of new statutory procedures and drafting requirements”**
 - ‘Orders Appointing CV’ – Best practices for scope of appointment (broad language v. specific scope)
 - Who Gets the CV Report? – The statute indicates a significant departure from prior practice, so know your confidentiality requirements with 11.130
 - Drafting the CV Report – How this is the same as prior reporting practices and how it is NOTPresenter: Lisa Malpass
- 12:00 – 1:00 Lunch
- 1:00 – 1:15 **Check-in**, Housekeeping. Sign-in and pick-up handouts
Welcome and introduction of Keynote Speaker – Brent Stanyer
- 1:15 – 2:45 **KEYNOTE: “Taking Care of YOU – Resilience and Self-Care for Life”**
Jean Steel <https://happypeoplewin.com>
- 2:45 – 3:00 Transition Break
- 3:00 – 4:15 **Hypothetical / Interactive Discussion** including Ethics
Judge Rachelle Anderson, Spokane County Superior Court and
Commissioner Tony Rugel
- 4:15 - Complete Evaluations, Adjournment, Sign Out

SPEAKER BIOS

JEAN STEEL received her master's degree in Wellness/Mind/Body health from California State University-Sacramento and a Bachelor of Arts degree from UC Santa Barbara. She has served on the faculty of Santa Barbara City College, Allan Hancock College, and Cal Poly San Luis Obispo. Her books include I'd Like to Run Wild!, a Wellness Action Guide, and Need Change? Customer Service Tips to Grow from Good to Great!. Jean has a vast and loyal client portfolio, such as the American Heart Association, California Hospital Association, G3 Enterprises, Arizona Association of Counties, Georgia Institute on Aging, U.S. Women in Nuclear, International Association of Exhibitions and Events (IAEE), Central California Women's Conference, the YMCA, and countless other organizations. And years later, Jean still pays visits to Africa as often as possible while also giving back much of her time and profits to several local and global charities.

JUDGE RACHELLE ANDERSON was appointed to Superior Court Dept. 12 in January 2019, prior to that, she served as a Spokane County Superior Court Commissioner since December 2010. Judge Anderson spent 13 years in private practice, focusing on family law and juvenile dependency matters. She spent a brief time as an Administrative Law Judge with the Washington State Office of Administrative hearings before her time on the bench.

Professional Affiliations: Judge Anderson currently serves as Immediate Past-President of the Superior Court Judges Association and is Co-Chair of the Superior Court Judges Association Legislative Committee. She serves on the SCJA Guardianship and Probate Committee, which she formerly chaired. She is former Chair of the Certified Professional Guardianship Board, former Chair of the WSBA Character and Fitness Board, and former Washington Young Lawyer Division Trustee.

Education: Eastern Washington University, Government, BA, 1994 • Gonzaga University School of Law, JD, 1997

Personal: Lifetime Spokane Resident • Married with five daughters between the two of us, dog lover and avid Gonzaga Basketball fan! Go ZAGS!

LYNDA CLARK is the owner of Safe Haven Guardianship Agency in Spokane Washington. Lynda is a certified professional guardian who has practiced in the Spokane area since graduating for University of Washington's Guardianship program in 2010. Safe Haven Guardianship currently has three professional guardians as well as five support staff to meet the needs of the clients we serve. Lynda enjoys working with clients to ensure they have a "voice" in their lives!

LISA A. MALPASS earned a Bachelor of Arts degree (BA) in Government and earned a Master's degree in Public Administration (MPA) from Eastern Washington University. In 2003, she earned her Law degree (honors) from Gonzaga University School of Law. Lisa has practiced law in Washington State since 2003 and was admitted to the State of Idaho in 2014.

Lisa has been an in-house legal benefits attorney for Adult Protective Services; an Attorney Advisor for the Social Security Administration; opened Malpass Law Office, P.S.; was a partner at Winston & Cashatt, Lawyers ; and now she can be found at the law firm of James P. Spurgetis, P.S.

Her areas of practice include guardianship/ conservatorship law, estate planning, probate administration and fiduciary services.

In 2019, Lisa was appointed to the Washington State Certified Professional Guardianship Board as a WSBA delegate. She is a past President of the Washington Chapter of the National Academy of Elder Law Attorneys (NAELA); a founding member of the SCBA Elder, Disability and Estate Planning (EDEP) section; a contributor of the Title 11.130 Guardian ad Litem State-Wide Advisory Committee; a member of the WSBA Elder Law and Administrative Law Sections, Real Property Probate and Trust Sections; and past chair of the Spokane County Superior Court Title 11.130 Training Committee. She is also a Leadership Spokane graduate and military veteran.

SHARON ANN SAITO was born and raised in Honolulu, Hawaii. She graduated from the University of Hawaii at Manoa in 1979 with a B.A. in Political Science and a certificate from the Marine Option Program. She is a proud graduate of the Gonzaga University School of Law, Class of 1982. Since obtaining her J.D., Ms. Saito's practice has included dependency cases where, at varying points of time, she represented children, parents, foster parents, adoptive parents, and the State of Washington in Pend Oreille County as a Special Assistant Attorney General for Children's Services. Ms. Saito was a founding member of the Pend Oreille County Family Dependency Drug Court and is a past president of the Spokane Chapter of the Japanese American Citizens League. Her current practice continues to include serving as a Title 4 Guardian ad Litem for vulnerable/impaired individuals, adoptions and RCW Title 11.130 adult guardianships.

Ms. Saito has been on the RCW 11.88 Guardian ad Litem registry in Spokane County since 2000 and also serves on the RCW 11.88 registries for Adams, Pend Oreille, and Stevens Counties.

TONY M. RUGEL

Court Commissioner 6

Appointed: September 4, 2012

Career Highlights

- Assistant Attorney General, Spokane/Olympia 2004 - 2012
- Senate Committee Counsel, Washington State Senate 2002 - 2004
- Attorney at Law, Law Offices of Ron Hammett, Republic, WA
- Deputy Prosecuting Attorney, Okanogan County Prosecuting Attorney's Office
- Attorney at Law, Law Office of Hank Rawson, Okanogan, WA

Professional Affiliations, Committees

- Special Assistant United States Attorney 2007 - 2008

Education

- Seattle University School of Law, J.D., 1993
- Eastern Washington University, B.S., 1990