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Chief Justice George Names New Statewide Probate Task Force

Panel to Recommend Ways to Improve Management of Cases for Vulnerable Members of Society

San Francisco—Chief Justice Ronald M. George today announced the appointment of the Judicial Council’s Probate Conservatorship Task Force, a new statewide panel that will make recommendations to improve the management of probate conservatorship cases in California trial courts.

“Conservatees are vulnerable members of society who enter our system with the expectation that they and their property will be protected by a fair judicial system pursuant to a high standard of fiduciary duty,” stated Chief Justice George. “The task force will seek to improve the quality of service to and protection of conservatees by strengthening the accountability of private and family conservators and improving the courts’ oversight of these cases.”

Conservatorship cases involve a court’s assuming oversight of persons who are unable to take care of themselves or their property.

The 16-member task force will be chaired by Administrative Presiding Justice Roger W. Boren of the Court of Appeal, Second Appellate District (Los Angeles). Its members include judges, attorneys, and probate court professionals from across California.

Chief Justice George announced that the task force’s official charge is to:

1. Seek input from a broad range of interested and affected stakeholders about how to improve the practices, procedures, and administration of probate conservatorship cases, including conservatees; private professional conservators, guardians, and fiduciaries; family members, including those appointed as conservators; attorneys who represent conservators and conservatees; advocacy groups; and judicial officers

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and court staff.

2. Perform a comprehensive review of:
 - a. The law governing conservatorships established under the Probate Code, including the current statutes, case law, rules of court, ethical constraints, standards of judicial administration, and related forms and procedures, as well as the best methods now used in courts' management of conservatorship cases;
 - b. The assignment of judicial officers to handle conservatorship cases, including any education, training, and other prerequisites for such assignments;
 - c. The laws, practices, and procedures of other jurisdictions, including any national standards that may exist, that pertain to conservatorships, guardianships, and/or other protective arrangements involving court oversight of dependent adults;
 - d. The educational and training programs on probate conservatorships that are currently being provided for judicial officers and other court personnel through the Administrative Office of the Courts' Education Division or other sources; and
 - e. The staffing and other court resources currently being utilized for probate conservatorships, including investigator, examiner, and attorney positions.
3. Make recommendations to the Judicial Council for reforms and improvements to the overall system of conservatorship administration—including but not limited to changes to legislation, rules of court, funding, education, and training—in order to enhance services provided for, and more effectively prevent and deter abuse of, conservatees.
4. Create model guidelines for probate courts' practices and procedures in the handling of conservatorship cases.
5. Make other recommendations to the Judicial Council that further the purposes of the task force.

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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Members of the Judicial Council's Probate Conservatorship Task Force

As of January 10, 2006; Expires December 31, 2007

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County of Los Angeles*

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*Judge of the Superior Court of
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*Judge of the Superior Court of California,
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*Probate Attorney, Superior Court of
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*Probate Administrator, Superior Court of
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First Appellate District, Division One*

Ms. Jody Patel
*Executive Officer, Superior Court of
California, County of Sacramento*

Ms. Sandy Sanfilippo
*Probate Court Investigator, Superior Court of
California, County of Santa Cruz*

Mr. Alan Slater
*Chief Executive Officer, Superior Court of
California, County of Orange*

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