# 

# The Advancing Guardianship Defense Cohort: An Intensive Technical Assistance Program

Legal assistance organizations across the country are recognizing that a skilled, passionate lawyer, ready to fight for the wishes of their client, is the single most effective way not only to protect the rights and autonomy of older adults facing or under guardianship but also to improve the guardianship system as a whole. The recent update to the Older Americans Act regulations also prioritizes the role of legal assistance in defending against the imposition of guardianship and in promoting alternatives to guardianship. But developing the organizational expertise and know-how to take on and expand this important work can be daunting. And that is why, if your organization is working to be one of these committed champions, the National Center on Law and Elder Rights (NCLER) and Justice in Aging invite you to apply to be part of our 2024 Advancing Guardianship Defense Cohort.

## Capacity Building & Technical Assistance Support

The Advancing Guardianship Defense Cohort is a six-month training and peer-to-peer learning program focused on building capacity and expertise in guardianship defense to better serve older adults by strengthening skills, processes, and partnerships.

Cohort members will connect with and learn from other members around the country who are similarly committed to providing guardianship defense and improving guardianship systems. Members will also receive intensive technical assistance from NCLER to help them develop and implement their own programmatic initiative to advance and expand their provision of guardianship defense services to older adults, especially those older adults and communities presently underserved. NCLER will provide regular consultations, ongoing feedback, and provision of relevant resources to help members develop, refine, and implement their plans, tailoring technical assistance to fit the needs of the organization and initiative.

Cohort members will:

* Attend six trainings focused on strategies and considerations for legal service organizations looking to expand and improve their guardianship defense work;
* Participate in peer-to-peer discussions with legal assistance organizations from across the country;
* Receive practical resources to support organizational efforts to build capacity and increase expertise in guardianship defense; and
* Receive targeted technical assistance from NCLER to help identify goals and desired outcomes for programmatic initiatives, build implementation strategies and timelines, provide initiative support, and assist with implementation activities.

Cohort member initiatives can relate to any one or more of the following core aspects of improving guardianship defense:

* Substantive skill development in guardianship defense and alternatives to guardianship (for example, initiatives to develop or improve advocacy skills and substantive expertise; educational programming; cultural competence; training manuals and materials; etc.)
* Operations and process (for example, initiatives to develop or improve internal policies, operating procedures, and case management protocols; organizational structures; workflow and process; etc.)
* Guardianship client acquisition (for example, initiatives to develop or improve intake practices, policies, and procedures; targeted outreach and relationship building to reach underserved populations; statutory or other appointment strategies; referral network structures; etc.)
* Partnership and collaboration (for example, initiatives to develop or improve interested party networks; pro bono programs and partnerships; commissions and working groups; external advocacy strategies and initiatives; collaboration with population-specific organizations; etc.)
* Outreach and education (for example, initiatives to develop or improve websites, pamphlets, videos, and public-facing materials; language access; community and network outreach and education on guardianship, organizational role, advance planning, alternatives and supports; etc.)

To learn more about the role of legal assistance in guardianship defense work, review our recent training: [You Can Make a Difference - Defending Against or Terminating Guardianship](https://vimeo.com/858684194).

## Participation & Time Commitment

Organizations interested in participating in the cohort should complete and submit the attached Program Information Sheet by **April 25, 2024**. By applying, interested organizations confirm that their executive leadership supports the application and implementation of their project. Organizations participate in teams of two or three individuals, with at least one team member who is in a supervisory or leadership position.

The cohort program is expected to run from June 2024 through December 2024. Cohort members will meet as a group six times for presentations and small group discussions, and these dates will be shared in advance. Intensive technical assistance will be provided by NCLER via an initial introductory/planning meeting, monthly one-on-one meetings, individual assistance as needed, and site visits as appropriate. We encourage applying organizations to consider the expected availability of their team members during the cohort’s duration.

We may reach out to applicants for more information. If you have questions about the Program Information Sheet or cohort, please email us at [ConsultNCLER@acl.hhs.gov](mailto:ConsultNCLER@acl.hhs.gov). We will also hold an Information Session to answer questions, and more information is forthcoming.

## Selection Criteria

We anticipate selecting 4-6 programs to participate in the 2024 Advancing Guardianship Defense Cohort. Participation will be determined based on the factors below, and the factors will be equally considered.

* Completeness of application form and application steps
* Organization demonstrates past or future commitment to the provision of guardianship defense for older adults
* Organization demonstrates ability to fund or obtain funding for proposed initiative (can be new or existing funding, such as OAA Title III-B funds)
* Organization and applying members demonstrate capacity to implement proposed initiative
* Proposed initiative has a clearly defined guardianship defense skills development component
* Proposed initiative has a clearly defined guardianship defense capacity building component

The following application is an opportunity for interested members of the NCLER network, and only organizations that are interested in participating need to apply. NCLER network members who do not participate in this full cohort program will receive ongoing resources developed as part of this program. NCLER will share learnings from the cohort with the entire network through trainings, practice tips, and other resources.

Please submit questions and completed Program Information Sheets to [ConsultNCLER@acl.hhs.gov](mailto:ConsultNCLER@acl.hhs.gov).

**Program Information Sheet**

### Basic Information

1. Submitter’s Name: Enter First and Last Name
2. Submitter’s Pronouns (Optional): Enter Pronouns
3. Submitter’s Title: Enter Title
4. Submitter’s Email Address: Enter Email Address
5. Submitter’s Organization/Program: Enter Full Name of Organization
6. Geographical Region or Regions Served by the Organization: Enter Service Region
7. Organization/Program Website (if available): Insert Link to Website
8. Does your organization receive funding from any of the following sources (check all that apply):

Older Americans Act Title III-B

Legal Services Corporation

Administration for Community Living Cooperative Agreements/Grants (including LAEP)

1. Please describe your organization’s current programmatic efforts to advance the provision of legal representation to older adults facing or under guardianship. (300 words or less)

Click or tap here to enter text

### Anticipated Team

1. Team Members

|  |  |  |  |
| --- | --- | --- | --- |
|  | Name/Pronouns (optional) | Title | Area of Expertise |
| **Member 1** | Name/Pronouns | Title/Organization | (10 words or less) |
| **Member 2** | Name/Pronouns | Title/Organization | (10 words or less) |
| **Member 3** | Name/Pronouns | Title/Organization | (10 words or less) |

### Project Information

1. Briefly describe the initiative to advance guardianship defense for older adults that your organization hopes to develop through your participation in this program. Note: Technical assistance will be focused on developing or refining plans for your initiative, but your team will not be expected to complete the project during the cohort period. (300 words or less)

Click or tap here to enter text

1. Please provide additional details about your initiative in the following chart:

|  |  |  |
| --- | --- | --- |
| **How does this project relate to older adults?** (100 words or less) | **How does this project relate to guardianship defense skills development?** (100 words or less) | **How does this project relate to guardianship defense capacity building?** (100 words or less) |
| Click or tap here to enter text | Click or tap here to enter text | Click or tap here to enter text |

1. Please select the anticipated technical assistance subject domain(s) related to your initiative:

Substantive skill development (advocacy skills and substantive expertise; educational programming; training manuals and materials; etc.)

Operations and process (internal policies, operating procedures, and case management protocols; organizational structures; workflow and process; etc.)

Client acquisition (intake practices, policies, and procedures; targeted outreach and relationship building; statutory or other appointment strategies; referral network structures; etc.)

Partnership and collaboration (interested party networks; pro bono programs and partnerships; commissions and working groups; external advocacy strategies and initiatives; etc.)

Outreach and education (websites, pamphlets, videos, and public-facing materials; community and network outreach and education; etc.)

1. Has your organization received funding for your initiative? If so, briefly describe the funding source and stipulations. (100 words or less)

Click or tap here to enter text

1. If applicable, please share any previous or ongoing efforts your organization has pursued on this issue. (300 words or less)

Click or tap here to enter text.

1. If applicable, please share the names of other groups you have identified as partners for this initiative (perhaps, for example, another legal assistance organization, the court, your state Legal Assistance Developer (LAD), etc.). (300 words or less)

Click or tap here to enter text.

1. Provide a brief summary of your technical assistance needs to move the initiative or goal forward. Examples of technical assistance topics include substantive skill development, operation and process improvement, effective outreach and education, partnership and collaboration building, client acquisition, etc. (300 words or less)

Click or tap here to enter text.

1. If applicable, please share any trainings or other learning opportunities your team members have pursued about guardianship defense. (300 words or less)

Click or tap here to enter text.

1. Please describe how often the applying team members meet internally. If you do not currently meet regularly, please describe how you plan to communicate on your initiative and how much time you anticipate you will have available to work on your initiative. (300 words or less)

Click or tap here to enter text.

1. Optional: please share any other relevant information about your program, goals, past initiatives, etc., relating to the advancement of guardianship defense for older adults. (300 words or less)

Click or tap here to enter text.

For information on the selection criteria for the 2024 Advancing Guardianship Defense for Older Adults Cohort, please see page 3 of this document. Thank you for completing this information sheet and for your interest. Please submit questions and applications to [ConsultNCLER@acl.hhs.gov](mailto:ConsultNCLER@acl.hhs.gov).