

March 13, 2013

House Committee on Human
Services and Housing

RE HB3129
First Hearing, HR D
Personal Testimony

My name is Nancy MacDonald. I am a professional fiduciary with over 25 years experience in this growing profession. It is my privilege to serve as the current president of GCA Oregon, and to present this testimony today, on their behalf.

GCA Oregon is a non profit, member organization of professional fiduciaries, whose mission includes:

- providing for the exchange of ideas between groups and individuals interested in furthering fiduciary services;
- promoting a broader understanding and acceptance of the qualified fiduciary as an essential part of the judicial system;
- and, promoting professional ethics, and establishing and maintaining high standards of professional education, competence and performance.

To this end, GCA Oregon endorses House Bill 3129 in its recommendation that national certification of professional fiduciaries be immediately required, under ORS125. A national certification model has been in operation for almost twenty years and is administered by the Center for Guardianship Certification, an allied foundation of the National Guardianship Association. I have provided written materials on the national association's Standards of Practice and the related certification process.

Through the work of these organizations, education and qualification standards have been established and training and certification tools have been developed and implemented. The process includes acquiring necessary knowledge and demonstrating proficiency in core competencies, then adding a continuing education component, re-certification and de-certification criteria. This certification process also includes:

- national criminal background checks, which are completed on all applicants and each certificant every four years (on every other renewal).
- education and employment history is verified on all applicants.
- And, there is a disciplinary review and de-certification process.

This certification process is endorsed and encouraged by GCA Oregon. Of the 58 Oregon fiduciaries who currently hold national certifications, most are also members of GCA Oregon. We ask, today, that this voluntary certification be expanded, to be made

mandatory for all practicing professional fiduciaries, in Oregon, and believe the public will be well served in implementing these standards and expectations.

Here is the best part for you..... There will be no cost burden to the State of Oregon for this certification. All costs currently are, and will continue to be, born by the fiduciary.

In addition to endorsing the certification requirement contained within HB3129, GCA Oregon supports the formation of a work group, appointed by the Oregon Judicial Department. The review of standards and best practices is an evolving process. Adding the voices of other stakeholder groups continues to build on the collaborative focus that we see today with other common endeavors - such as expanding public guardianship services throughout the state, developing a volunteer court visitor program, developing training and education tools for non-professional fiduciaries and working on the National Guardianship Network's WINGS grant. The time, energy and commitment for these endeavors is occurring so that vulnerable protected individuals may be better served and their rights better safeguarded.

Thank you very much for your time.