



State of Wisconsin
2019 - 2020 LEGISLATURE

LRB-2596/1
SWB:kjf&amn

2019 SENATE BILL 734

January 29, 2020 - Introduced by Senators JACQUE, BERNIER, BEWLEY, CARPENTER, JOHNSON, OLSEN, SCHACHTNER, L. TAYLOR, TESTIN, WANGGAARD, WIRCH and TIFFANY, cosponsored by Representatives ZIMMERMAN, ROHRKASTE, ANDERSON, BOWEN, DITTRICH, EDMING, FIELDS, KNODL, MURPHY, B. MEYERS, NEUBAUER, NOVAK, OHNSTAD, POPE, RODRIGUEZ, SCHRAA, SHANKLAND, SINICKI, SPIROS, SPREITZER, C. TAYLOR, VRUWINK, DOYLE, GOYKE, JAMES, STUBBS, KULP and SUBECK. Referred to Committee on Universities, Technical Colleges, Children and Families.

1 **AN ACT** *to renumber* 46.977 (2) (a) and 54.15 (8) (a) 1. to 4.; *to renumber and*
2 *amend* 46.977 (1) (b); *to consolidate, renumber and amend* 46.977 (1)
3 (intro.) and (a); *to amend* 46.977 (2) (b) (intro.), 46.977 (2) (c), 54.15 (8) (a)
4 (intro.) and 54.15 (8) (b); and *to create* 46.977 (3), 54.15 (8) (a) 2m. and 54.26
5 of the statutes; **relating to:** guardian training requirements and making an
6 appropriation.

Analysis by the Legislative Reference Bureau

This bill establishes mandatory initial training requirements for guardians. Under the bill, every guardian of the person must complete training on all of the following topics: 1) the duties and required responsibilities of a guardian under the law and limits of a guardian's decision-making authority; 2) alternatives to guardianship, including supported decision-making and powers of attorney; 3) rights retained by a ward; 4) best practices for a guardian to solicit and understand the wishes and preferences of a ward, involving a ward in decision-making, and taking a ward's wishes and preferences into account in decisions made by the guardian; 5) restoration of a ward's rights and the process for removal of guardianship; 6) future planning and identification of a potential standby or successor guardian; and 7) resources and technical support for guardians. The bill also requires that every guardian of the estate must complete training on the duties and required responsibilities of a guardian under the law and limits of a guardian's

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decision-making authority and inventory and accounting requirements. The bill provides limited exemptions for certain corporate and volunteer guardians.

Under the bill, a proposed guardian of the person or the estate must submit, as part of the guardianship case, a sworn and notarized statement to the court that the person has completed the training requirements.

The bill requires the Department of Health Services to award a grant to administer and conduct the required guardian training. DHS must require, in the request for proposal, that the grantee have expertise in state guardianship law, experience with technical assistance and support to guardians and wards, and knowledge of common challenges and questions encountered by guardians and wards. In addition, the grantee selected to develop training shall develop plain language, web-based online training modules using adult-learning design principles that can be accessed for free by training topic and in formats that maximize accessibility, with printed versions available for free upon request.

For further information see the *state* fiscal estimate, which will be printed as an appendix to this bill.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

1 **SECTION 1.** 46.977 (1) (intro.) and (a) of the statutes are consolidated,
2 renumbered 46.977 (1) and amended to read:

3 46.977 (1) ~~DEFINITIONS~~ DEFINITION. In this section: (a) ~~“Guardian”, “guardian”~~
4 has the meaning given in s. 54.01 (10).

5 **SECTION 2.** 46.977 (1) (b) of the statutes is renumbered 46.977 (2) (ag) and
6 amended to read:

7 46.977 (2) (ag) ~~“Organization”~~ “organization” means a
8 private, nonprofit agency or a county department under s. 46.215, 46.22, 46.23, 51.42
9 or 51.437.

10 **SECTION 3.** 46.977 (2) (a) of the statutes is renumbered 46.977 (2) (am).

11 **SECTION 4.** 46.977 (2) (b) (intro.) of the statutes is amended to read:

12 46.977 (2) (b) (intro.) Organizations awarded grants under par. (a) ~~(am)~~ shall
13 do all of the following:

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1 **SECTION 5.** 46.977 (2) (c) of the statutes is amended to read:

2 46.977 **(2)** (c) In reviewing applications for grants under par. (am), the
3 department shall consider the extent to which the proposed program will effectively
4 train and assist guardians for individuals found incompetent under ch. 54.

5 **SECTION 6.** 46.977 (3) of the statutes is created to read:

6 46.977 **(3)** GRANT FOR INITIAL TRAINING. (a) From the appropriation under s.
7 20.435 (1) (cg), the department shall award a grant to develop, administer, and
8 conduct the guardian training required under s. 54.26.

9 (b) The department shall require the grantee to have expertise in state
10 guardianship law, experience with technical assistance and support to guardians
11 and wards, and knowledge of common challenges and questions encountered by
12 guardians and wards.

13 (c) The grantee selected to develop training that meets the requirements under
14 s. 54.26 (1) shall develop plain language, web-based online training modules using
15 adult-learning design principles that can be accessed for free by training topic and
16 in formats that maximize accessibility, with printed versions available for free upon
17 request.

18 **SECTION 7.** 54.15 (8) (a) (intro.) of the statutes is amended to read:

19 54.15 **(8)** (a) (intro.) At least 96 hours before the hearing under s. 54.44, the
20 proposed guardian shall submit to the court ~~a-~~ all of the following:

21 1m. A sworn and notarized statement as to whether any of the following is true:

22 **SECTION 8.** 54.15 (8) (a) 1. to 4. of the statutes are renumbered 54.15 (8) (a) 1m.
23 a. to d.

24 **SECTION 9.** 54.15 (8) (a) 2m. of the statutes is created to read:

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1 54.15 (8) (a) 2m. A sworn and notarized statement that the proposed guardian
2 has completed the training requirements under s. 54.26 (1).

3 **SECTION 10.** 54.15 (8) (b) of the statutes is amended to read:

4 54.15 (8) (b) If par. (a) ~~1., 2., 3., or 4.~~ 1m. a., b., c., or d. applies to the proposed
5 guardian, he or she shall include in the sworn and notarized statement a description
6 of the circumstances surrounding the applicable event under par. (a) ~~1., 2., 3., or 4.~~
7 1m. a., b., c., or d.

8 **SECTION 11.** 54.26 of the statutes is created to read:

9 **54.26 Guardian training requirements. (1) REQUIRED TRAINING TOPICS.** (a)
10 Every guardian of the person shall complete web-based, online training on all of the
11 following topics:

12 1. The duties and required responsibilities of a guardian under the law and
13 limits of a guardian’s decision-making authority.

14 2. Alternatives to guardianship, including supported decision-making
15 agreements and powers of attorney.

16 3. Rights retained by a ward.

17 4. Best practices for a guardian to solicit and understand the wishes and
18 preferences of a ward, involving a ward in decision making, and taking a ward’s
19 wishes and preferences into account in decisions made by the guardian.

20 5. Restoration of a ward’s rights and the process for removal of guardianship.

21 6. Future planning and identification of a potential standby or successor
22 guardian.

23 7. Resources and technical support for guardians.

24 (b) Every guardian of the estate shall complete training on all of the following
25 topics:

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1 1. The duties and required responsibilities of a guardian under the law and
2 limits of a guardian's decision-making authority.

3 2. Inventory and accounting requirements.

4 **(2) INITIAL TRAINING REQUIREMENTS.** (a) Before the final hearing for a permanent
5 guardianship, any person nominated for appointment or seeking appointment as a
6 guardian of the person is required to receive the training required under sub. (1) (a).

7 (b) Before the final hearing for permanent guardianship, any person
8 nominated for appointment or seeking appointment as a guardian of the estate is
9 required to receive at least the training required under sub. (1) (b).

10 (c) A guardian under s. 54.15 (7) who is regulated by the department is exempt
11 from pars. (a) and (b).

12 (d) A volunteer guardian who has completed the training requirements under
13 sub. (1) is exempt from pars. (a) and (b) with regard to subsequent wards.

14 **SECTION 12. Nonstatutory provisions.**

15 (1) The entity selected under s. 46.977 to administer and conduct training shall,
16 no later than one year after the effective date of this subsection and in coordination
17 with the department of health services, develop the content for the initial training
18 to be provided to guardians under s. 54.26, and implement the program no later than
19 18 months after the effective date of this subsection.

20 **SECTION 13. Fiscal changes.**

21 (1) **GUARDIAN TRAINING.** In the schedule under s. 20.005 (3) for the appropriation
22 to the department of health services under s. 20.435 (1) (cg), the dollar amount for
23 fiscal year 2019-20 is increased by \$135,750 to fund a guardian training grant under
24 s. 46.977 (3). In the schedule under s. 20.005 (3) for the appropriation to the
25 department of health services under s. 20.435 (1) (cg), the dollar amount for fiscal

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SECTION 13

1 year 2020-21 is increased by \$126,325 to fund a guardian training grant under s.
2 46.977 (3).

3 **SECTION 14. Initial applicability.**

4 (1) The treatment of s. 54.26 (1) first applies to petitions for guardianship filed
5 on the first day of the 13th month beginning after the date of passage by the 2nd
6 house of the legislature.

7 (END)