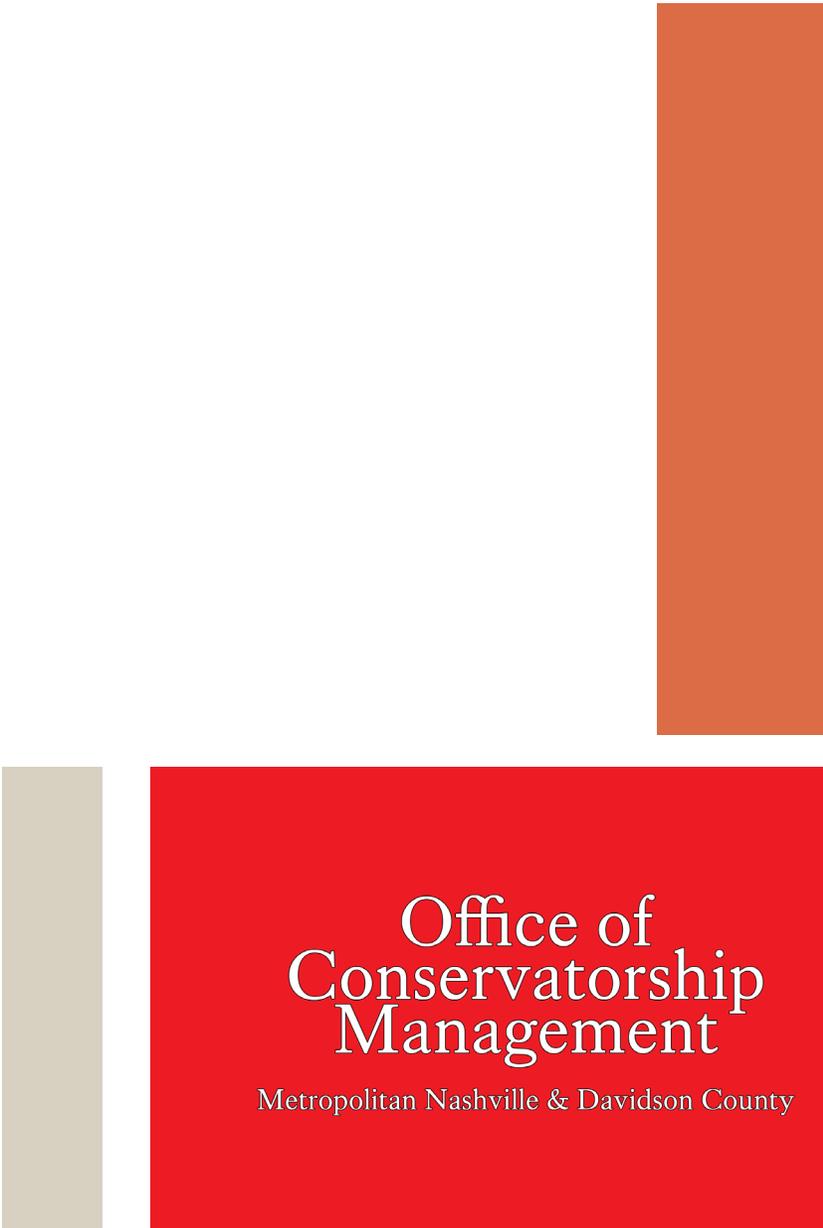


THE OFFICE OF CONSERVATORSHIP MANAGEMENT

The Office of Conservatorship Management helps to encourage the responsible, ethical, and appropriate financial management and physical treatment of individuals under a Guardianship or Conservatorship within Davidson County.



Office of Conservatorship Management

Metropolitan Nashville & Davidson County

THE BEGINNING

A group of independent professionals, the “Volunteer Task Force,” reviewed the Guardianship and Conservatorship process in Davidson County. The Volunteer Task Force compared the local process with models from other jurisdictions, identified needs and made specific recommendations for how the process could be improved upon. Based upon the recommendations of the Volunteer Task Force and former Metropolitan Mayor Karl Dean, the proposed office was created by the Metropolitan Council. The official name of the office is the “Office of Conservatorship Management,” which was decided to be the most accurate and appropriate title, based upon the recommended functions and goals proposed by the Volunteer Task Force, Mayor Dean, and the Metropolitan Council. The Office of Conservatorship Management was created as a division of the Metropolitan State Trial Courts Department.

The creation of the Metropolitan Office of Conservatorship Management was authorized by Substitute Ordinance No. BL2014-774; The Budget Ordinance of the Metropolitan Government of Nashville and Davidson County, Tennessee for Fiscal Year 2015.



OCM

THE GOALS

Some of the paramount goals of this Office, as the needs were identified by the Volunteer Task Force, are to:

Review the care and management that a conservator provides for the health, safety, and welfare of individuals under a conservatorship;

Add an additional layer of review of the management of the assets by conservators;

Help connect conservators to available resources that promote successful conservatorships;

Educate conservators and the public in general about conservatorships in Davidson County;

Educate persons with a disability on their rights as a conservatee.

These goals are pursued through an active staff working in concert with other Metro departments, organizations and agencies, knowledgeable professionals, and organized volunteers.

Through these efforts, the Office of Conservatorship Management helps to encourage the responsible, ethical, and appropriate management and treatment of individuals under a conservatorship within Davidson County.

As the Director for the Office of Conservatorship Management (“OCM”), Amy Willoughby Bryant oversees the management of the office, staff, advisory committees, and active guardianship and conservatorship cases. She does policy and procedure changes, educates lawyers and public, develops training and attends court hearings. The blueprint for a statewide office exists within the OCM policy and procedures. She is a subject matter expert in the laws and the policies involved in conservatorships. She has successfully led the OCM office for the past five years. She continues to make contacts and raise awareness about the need for more oversight in Tennessee.



THE DIRECTOR

Amy has had several articles published. A few op-eds have been published in the Tennessean and the Tribune. In 2023, she pinned an article about the need for training that was published in the National Guardianship Association newsletter. More recently the Tennessee Bar Journal featured her article, “How Can Tennessee Provide Better Oversight for Conservatorships?” in its July 2023 issue.

Additionally, through her role at the OCM, Amy launched the first and only statewide online training for conservators in the state of Tennessee. Her program has been shared with all of the judges and clerks across the state and nationally. The quizzes and videos have been viewed over 7,000 times and over 1,600 completions of the quizzes. It is very exciting that conservators statewide have been trained under this program.

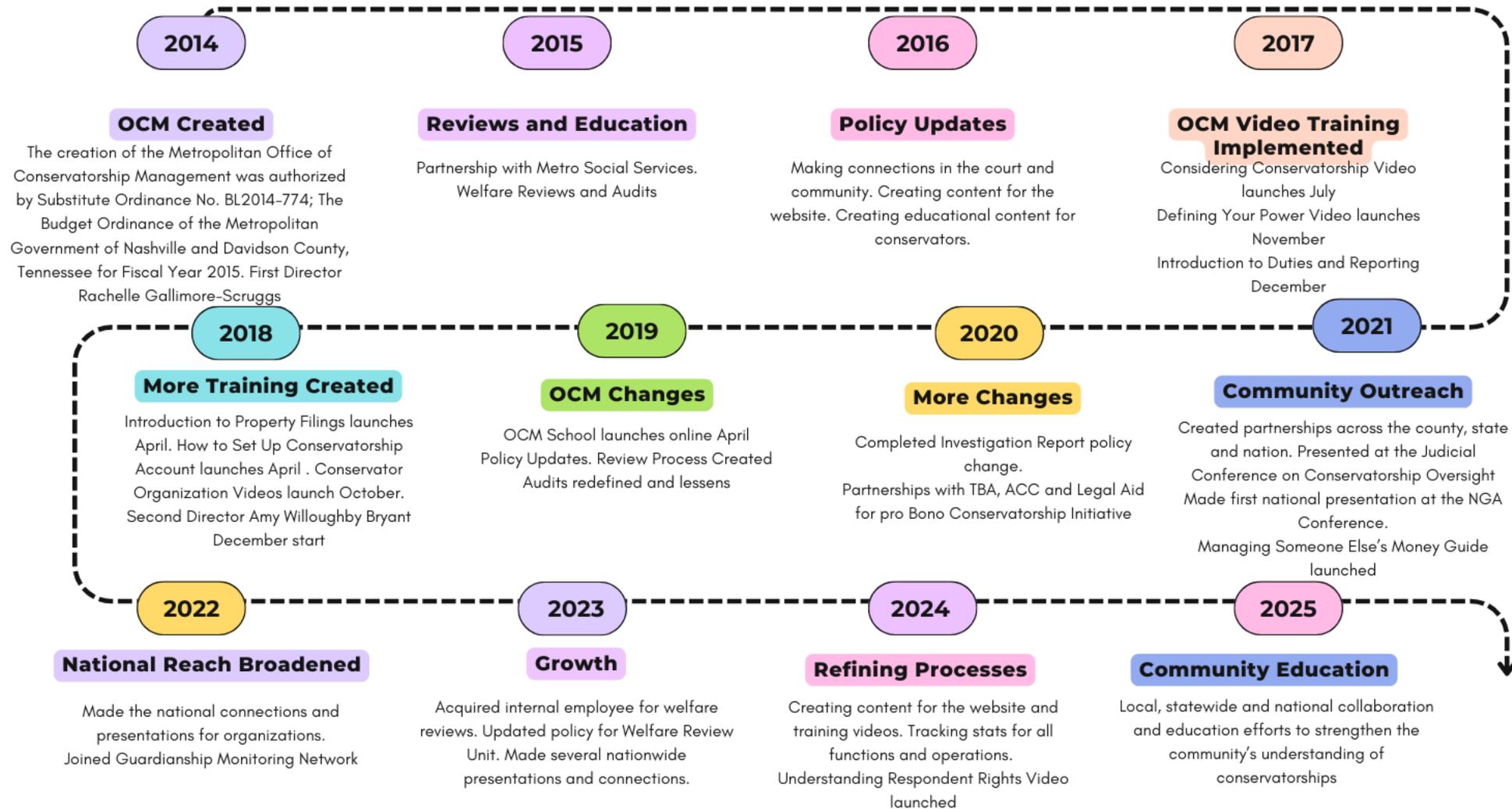
The OCM is one of a kind in the state of Tennessee and one of the only in the southeastern United States. She leads an office that is the example for other organizations of this kind in the future. Most recently, Amy led the charge to request for promulgation of a new Supreme Court rule to protect the interests of the individuals under conservatorship. Additionally, she assisted the Conservatorship Association of TN with recently proposed legislation to require training.

As President and committee chair for the Conservatorship Association of Tennessee, she is working to create more training for those caring for the elderly and persons with a disability. She has worked to develop more accessibility to resources for conservators and those caring for the elderly and disabled by leading the effort to provide online forms and resources in Spanish and updating the website to serve as a one stop shop for conservators to meet their needs.

Through her role as the Public Education Chair for the Tennessee Bar Association, she is helping to lead an effort to provide Pro Bono legal services to the parents of young adults in public schools throughout Middle TN who need to gain a conservatorship for their child with a disability. In 2020, this initiative was launched statewide for parents of children with disabilities. To date, the Pro Bono initiative has benefited over 100 families in Middle TN.

Amy serves as an adjunct professor at Belmont University College of Law in Elder Law. Through her role as a professor, she is helping to shape the next generation of young lawyers. She intends to create a statewide office and she is the one person in the state that is focused on conservatorships day in and day out. Most important, she has the passion and drive to make this happen.

OCM Timeline





ORG CHART 2014 – 2023





ORG CHART 2023 - PRESENT



DAVIDSON COUNTY STATISTICS



Total Conservatorships & Guardianships

3082



Total value of personal property subject to conservatorships as of November 2024

\$116,755,562

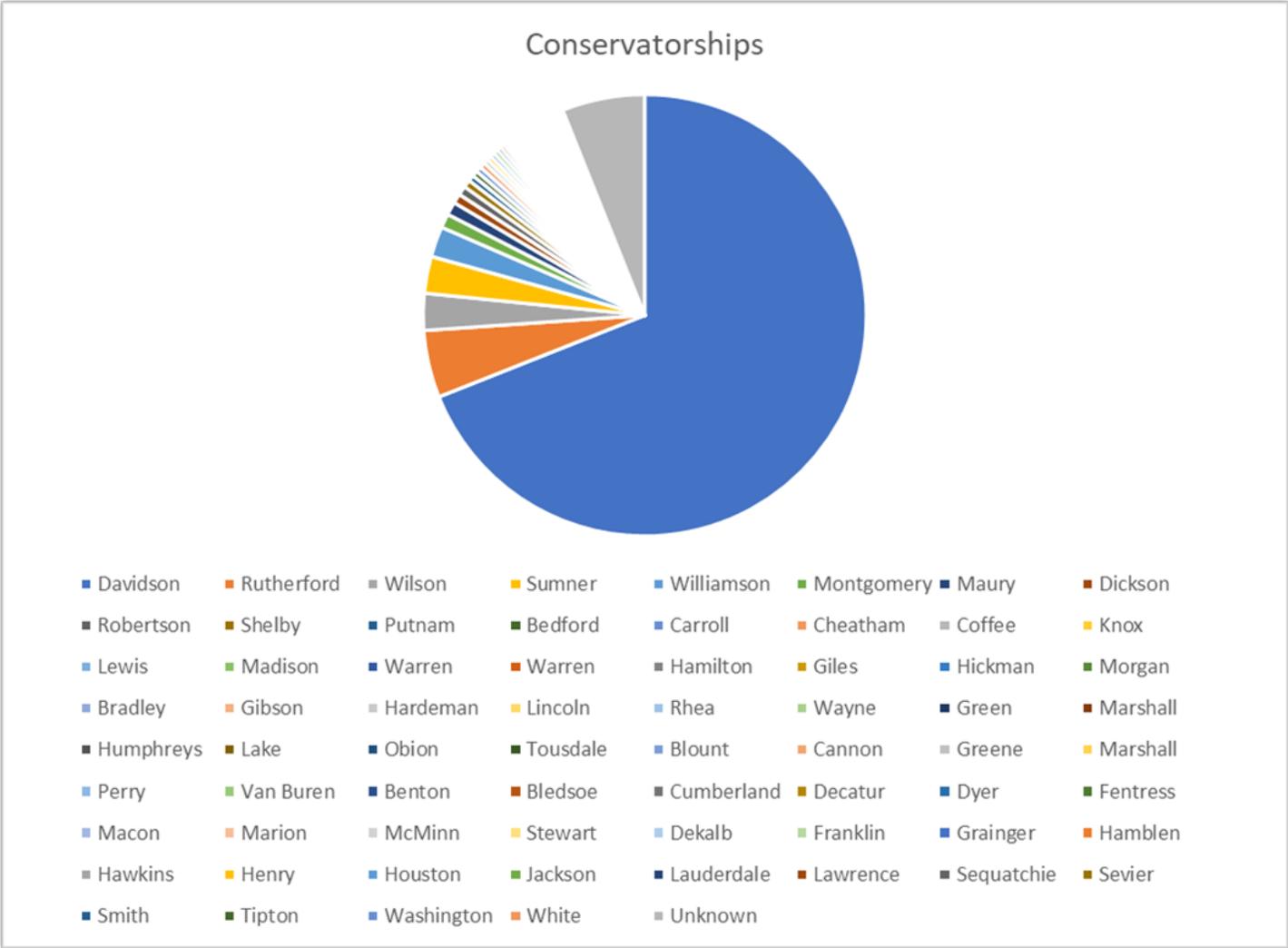


Total number of conservatorships with annual accountings as of Nov 2023

366 conservatorships

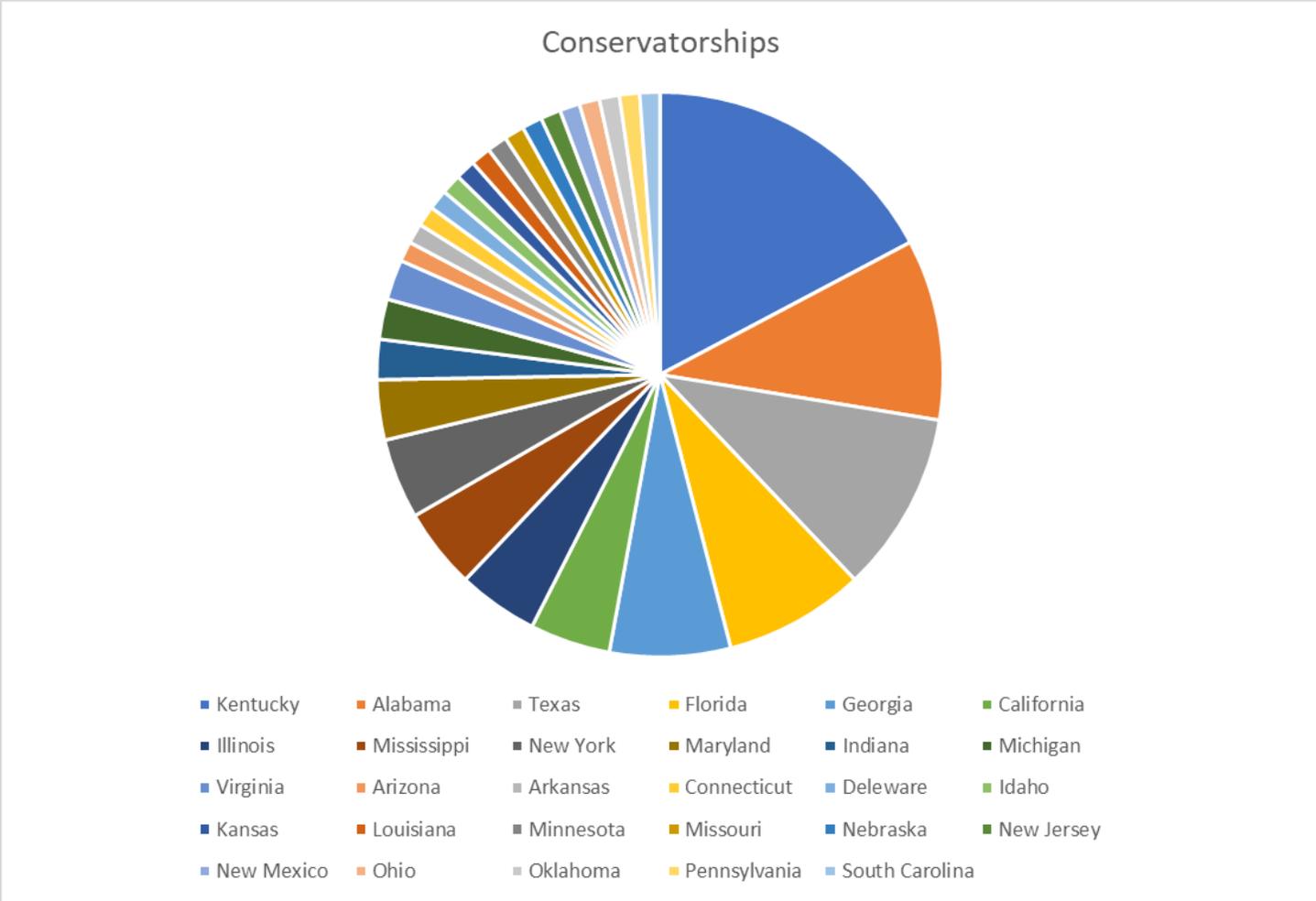
DAVIDSON COUNTY CONSERVATORSHIPS

2024



DAVIDSON COUNTY CONSERVATORSHIPS

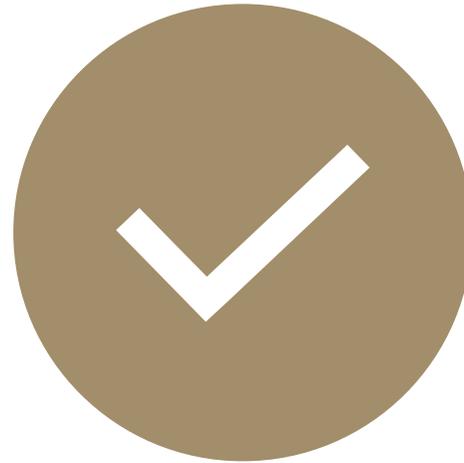
2024



OCM AUTHORITY — CIRCUIT COURT ORDERS



BLANKET ORDER OF
AUTHORITY



CASE SPECIFIC ORDER

OCM FUNCTIONS



WELFARE
REVIEW



FINANCIAL
REVIEW



EDUCATION



RESOURCES

OCM CURRENTLY SERVES FOUR CIRCUIT COURTS



7TH 2014 -
PRESENT



2ND 2020 -
PRESENT



1ST 2023 -
PRESENT



8TH 2023 -
PRESENT

OCM ADDITIONAL SERVICES



REVIEW CIRCUIT COURT
CLERK OFFICE FORMS
AND MAKE UPDATES



DEVELOP ONGOING
BEST PRACTICES FOR
LAWYERS AND
CONSERVATORS



EDUCATE LAWYERS
AND THE PUBLIC ABOUT
BEST PRACTICES FOR
CONSERVATORS



THE OCM DIRECTOR
PROVIDES GUIDANCE
AND INFORMATION
FOR LAWYERS SERVING
AS GAL AND AAL



ALERTS THE COURT OF
CONCERNS THROUGH
REPORTS AND FILED
PLEADINGS.



LITIGATES THE CASES
FOR REMOVAL OF
CONSERVATORS,
MODIFICATION OF
CONSERVATORSHIPS
AND TERMINATION OF
CONSERVATORSHIPS

WELFARE REVIEW

Conservator of the Person

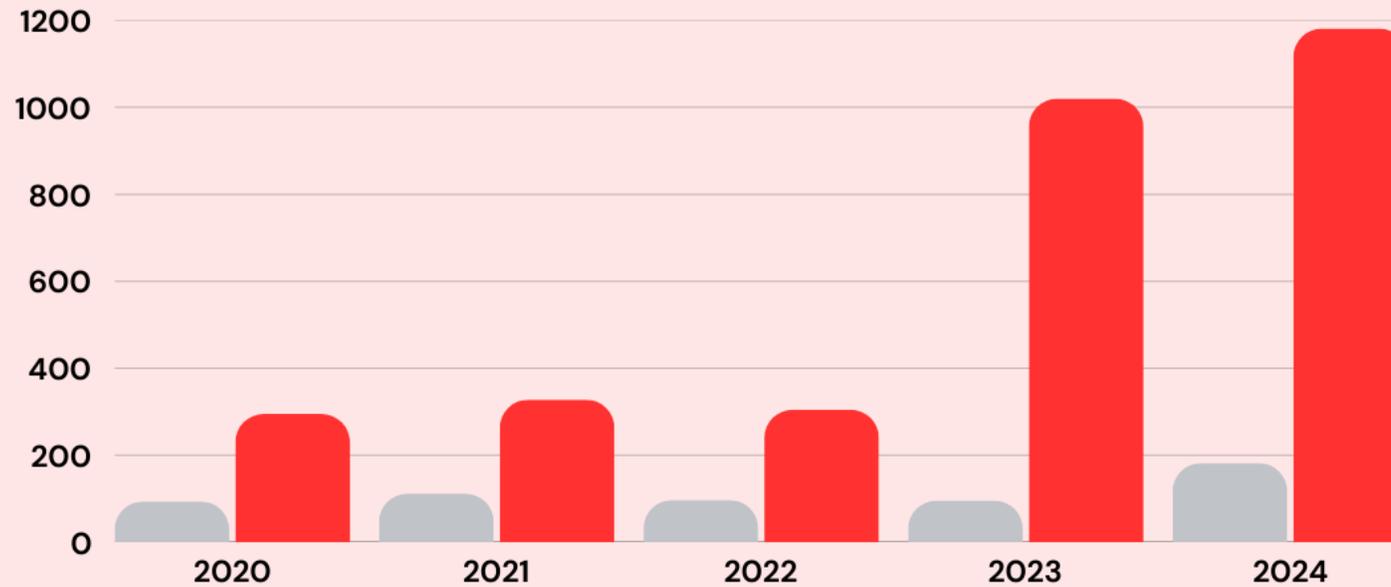
The OCM, through its partnership with Metro Social Services and Welfare Review Unit, shall independently investigate the care management provided by the conservator for the health, safety, and welfare of individuals for which the conservator has assumed fiduciary duties.

FINANCIAL REVIEW

Conservator of the Property

The OCM, through its Financial Investigative Unit, shall independently investigate the asset management provided by the conservator for the financial health and betterment of a conservatorship estate for which the conservator has assumed fiduciary duties.

OCM OUTPUT REPORT



Financial Reviews by fiscal year

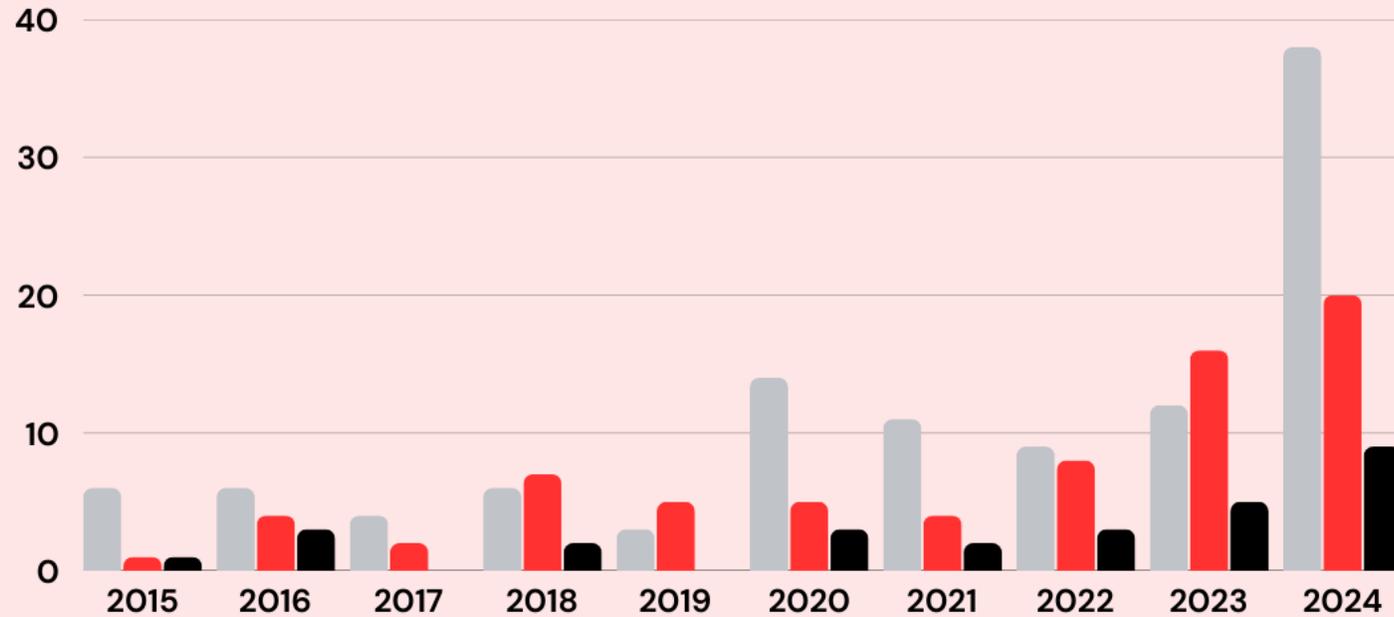
*2023 includes special project reviewing all cases

*2024 includes guardianship reviews and completion of special project



Welfare Reviews by fiscal year

OCM EFFECTIVE CHANGE REPORT



Conservatorships
Modified



Successor Appointed



Conservatorships
Terminated

THE OCM HAS HELP
CONNECT OVER 100
MIDDLE TN FAMILIES
WITH LAWYERS TO
ASSIST WITH THEIR
DISABLED ADULT
CHILDREN



Public Education Committee

CONSERVATORSHIP
ASSISTANCE PROGRAM

CONTACT US

www.tba.org/Conservatorship_Portal

HELP RAISE AWARENESS

Is your child with a disability turning 18 soon? Do you need to establish a conservatorship for your adult child? There are services available that may provide free legal representation to establish a conservatorship if you qualify.



Office of Conservatorship Management
Metropolitan Nashville & Davidson County

OCM.NASHVILLE.GOV
(615) 880-3355

OCM TRAINING

This Guide was adapted from the Consumer Financial Protection Bureau's (the "CFPB's") "Managing Someone Else's Money" guide.

The Office of Conservatorship Management prepared this Guide to include information about Tennessee state law and resources.

An electronic version can be found at:
<https://ocm.nashville.gov/>

MANAGING SOMEONE ELSE'S MONEY

**Help for court-appointed conservators
of the property in Tennessee**

OCM TRAINING VIDEOS

OCM Conservatorship School

This program is designed to provide basic information about the conservator's fiduciary duties under TN laws. Trainings are offered at no cost to the participant and a certificate of completion will be provided upon successful completion of each quiz. This information is not a substitute for legal counsel and is not legal advice.

The videos have been viewed over 11000 times and the quizzes have been completed over 2000 times.



Understanding Respondent Rights

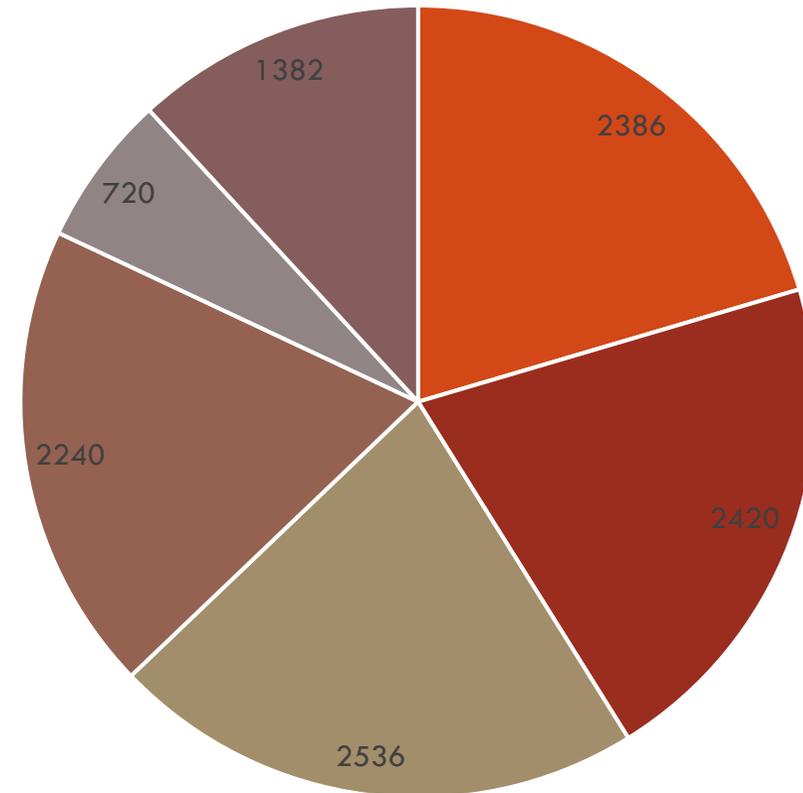


OCM CONSERVATORSHIP SCHOOL

The OCM Conservatorship School consists of 6 videos with corresponding quizzes.

- Defining Your Powers is an introduction to the conservator's fiduciary responsibilities and reporting requirements.
- Definiendo Sus Poderes is the Spanish version.
- Introduction to Duties and Reporting goes into further detail about the specific responsibilities of the conservator for both person and property.
- Introduction to Property Filings details for the conservator of property how to complete and file Inventory, Property Management Plans, Bond and Accountings.
- How to Set Up a Conservatorship Account
- Understanding Respondent Rights is an overview of the rights of the person with a disability under statute and based on the NGA Bill of Rights.

Training Video Views



- Defining Your Powers
- Conservatorship Account
- Duties and Reporting
- Property Filings
- Respondent Rights
- Definiendo Sus Poderes



INDEPENDENT CONSERVATOR PANEL

The OCM maintains a database of independent conservators willing to serve as a fiduciary when the respondent has no family, friend or loved one to appoint.

The independent conservator panel has grown from 17 lawyers, 5 non-lawyers, and 8 agencies in the first 5 years to 35 lawyers, 15 non-lawyers and 8 agencies currently.



THE OCM IS DEDICATED TO EDUCATING THE PUBLIC AND MAKING CONNECTIONS TO PROVIDE RESOURCES. THE OCM HAS BEEN INTENTIONAL TO CREATE RELATIONSHIPS WITH THE DISABILITY COMMUNITY AND ORGANIZATIONS TO HELP WITH APPROPRIATE OVERSIGHT FOR PERSONS WITH DISABILITIES WITHIN DAVIDSON COUNTY AND THE STATE OF TENNESSEE. THE OCM MAKES NUMEROUS PRESENTATIONS EACH YEAR TO SPREAD THE WORD ABOUT THE SERVICES OFFERED BY THE OCM AND HOW CONSERVATORSHIPS ARE DESIGNED TO HELP THE MOST VULNERABLE IN OUR COMMUNITY.



LOCAL, STATE AND NATIONAL CONNECTIONS



METRO
NASHVILLE
PUBLIC
SCHOOLS



LOCAL, STATE AND NATIONAL CONNECTIONS



NASHVILLE BAR
ASSOCIATION



LEGAL AID SOCIETY
OF MIDDLE TENNESSEE AND THE CUMBERLANDS



WEST TENNESSEE
LEGAL SERVICES



LOCAL, STATE AND NATIONAL CONNECTIONS



Mental Health
Cooperative



**DISABILITY
RIGHTS TN**

BELMONT
LAW

*Fifty
Forward*



 **COSCA**
Conference of State Court Administrators

NLBA

NAPIER-LOOBY
BAR ASSOCIATION

TN Commission on
Aging & Disability

LOCAL, STATE AND NATIONAL CONNECTIONS

THE TENNESSEAN

*The Tennessee Tribune*TM



NEIGHBOR 2 NEIGHBOR



NEXT STEPS
AT VANDERBILT UNIVERSITY



iDEAL



Department of
Human Services



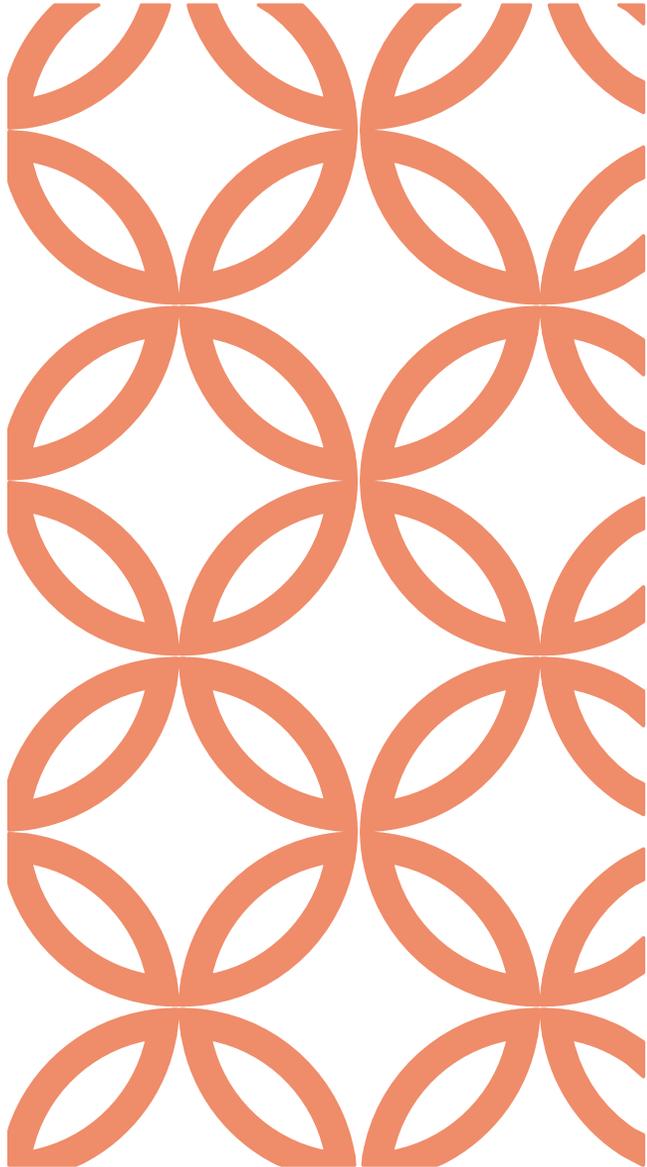
Office of Conservatorship Management

Metropolitan Nashville & Davidson County

Connecting Conservators with Resources

The OCM helps to encourage the responsible, ethical, and appropriate management and treatment of individuals under a Guardianship or Conservatorship within Davidson County.

Call the Office of Conservatorship Management
at 615-880-3355 or visit ocm.nashville.gov
if you have a question or to report a concern.



Amy Bryant

Director, Office of Conservatorship Management

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amybryant@jisnashville.gov

CONTACT