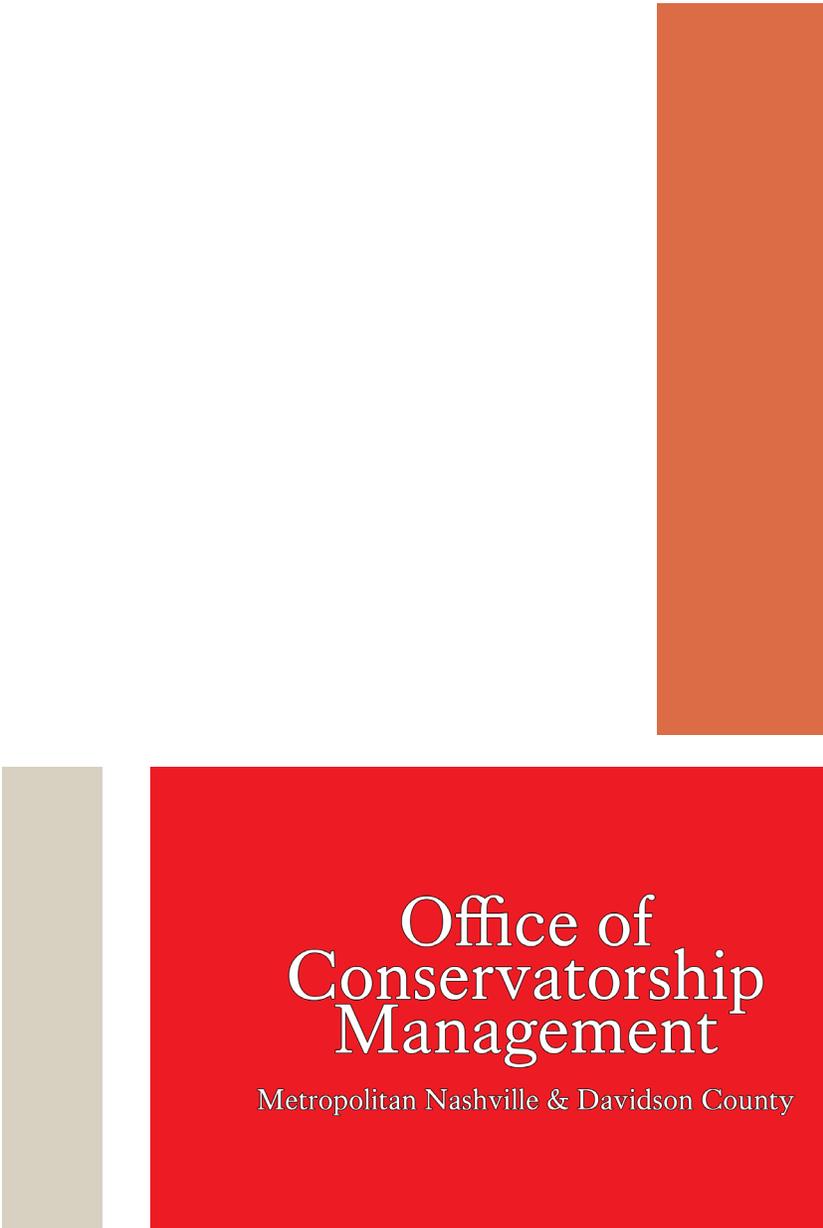


# THE OFFICE OF CONSERVATORSHIP MANAGEMENT

---

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.

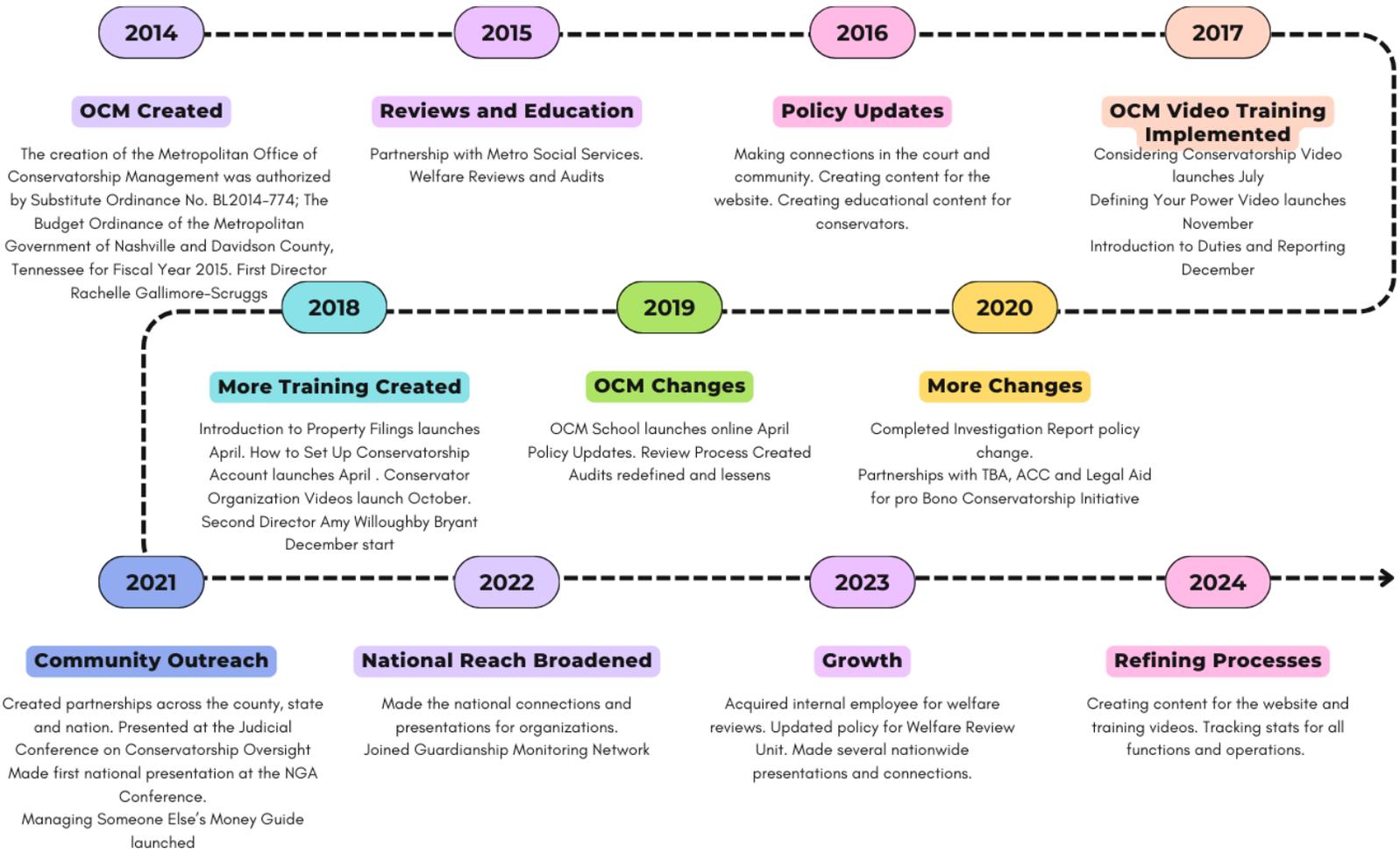
The OCM is one of a kind in the state of Tennessee and one of the only in the southeastern United States. She leads an office that is the example for other organizations of this kind in the future. Most recently, Amy led the charge to request for promulgation of a new Supreme Court rule to protect the 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

2964



Total value of personal property subject to conservatorships as of November 2023

\$123,495,973



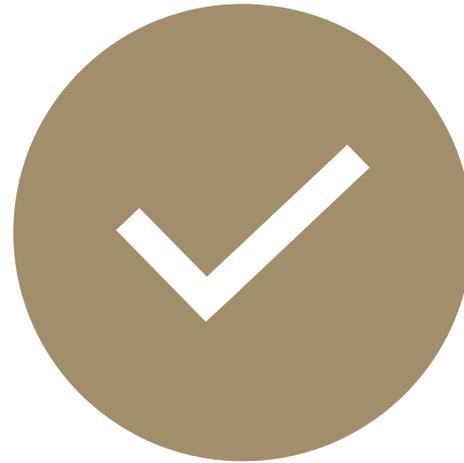
Total number of conservatorships with annual accountings as of Nov 2023

292 conservatorships

# 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



7<sup>TH</sup> 2014 -  
PRESENT



2<sup>ND</sup> 2020 -  
PRESENT



1<sup>ST</sup> 2023 -  
PRESENT



8<sup>TH</sup> 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.

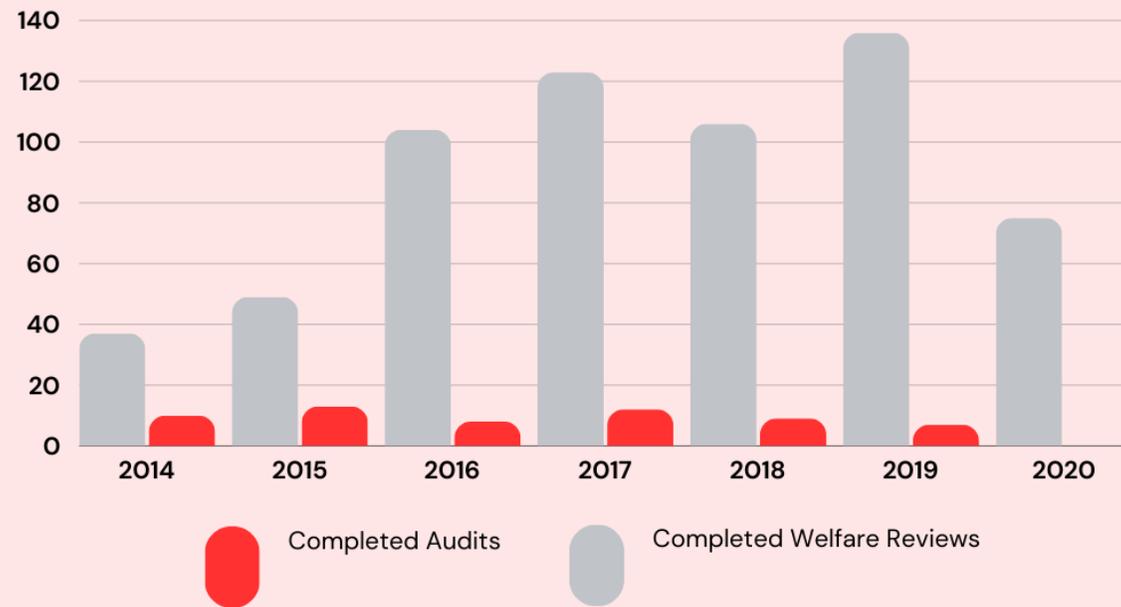
# FINANCIAL REVIEW

---

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



# OCM OUTPUT REPORT



# OCM EFFECTIVE CHANGE REPORT



# THE OCM HAS HELP CONNECT 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](http://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 7000 times and the quizzes have been completed over 1600 times.



## Understanding Respondent Rights

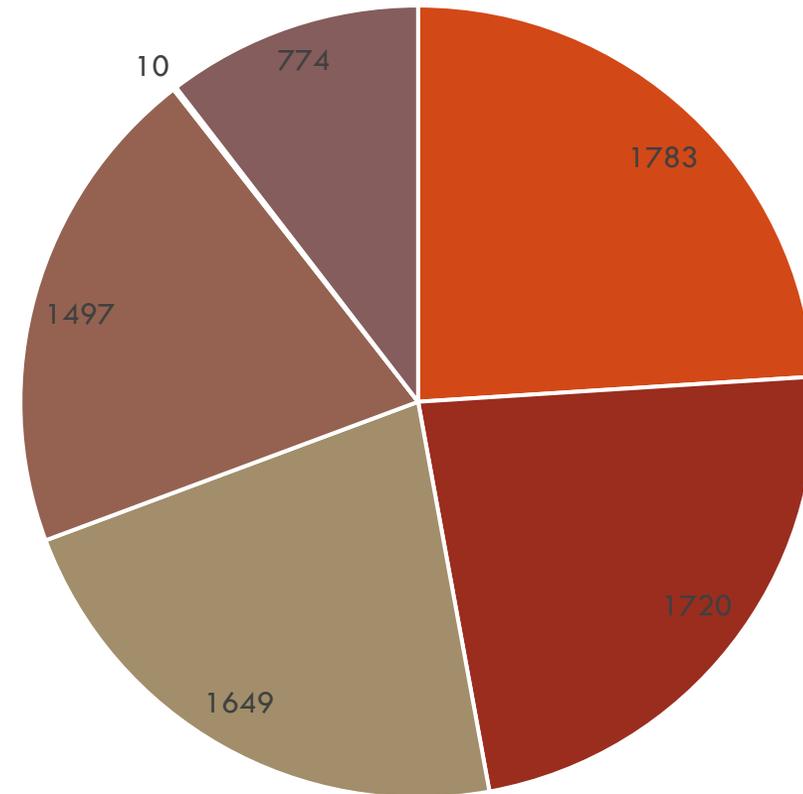


# OCM CONSERVATORSHIP SCHOOL

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, 12 non-lawyers and 8 agencies currently.



# **DID YOU KNOW?**



## **INTERESTING FACT**

The OCM has uncovered over \$500,000 in conservatorship funds.

# **DID YOU KNOW?**



## **INTERESTING FACT**

The OCM has located undisclosed property.

# **DID YOU KNOW?**



## **INTERESTING FACT**

The OCM help terminate 52 conservatorships.

# **DID YOU KNOW?**



## **INTERESTING FACT**

71 conservators have been removed or replaced due to issues identified by the OCM.

# **DID YOU KNOW?**



## **INTERESTING FACT**

The OCM has identified cases in which conservators used the respondent's money for their own benefit.

# **DID YOU KNOW?**



## **INTERESTING FACT**

The OCM has identified real property purchased or sold without court approval.

# **DID YOU KNOW?**



## **INTERESTING FACT**

The OCM has modified 19 conservatorship for expansion or change.

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



# 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

 Commission on  
Aging & Disability

# LOCAL, STATE AND NATIONAL CONNECTIONS

THE TENNESSEAN

*The Tennessee Tribune*<sup>TM</sup>



NEIGHBOR 2 NEIGHBOR



iDEAL



Department of  
**Human Services**



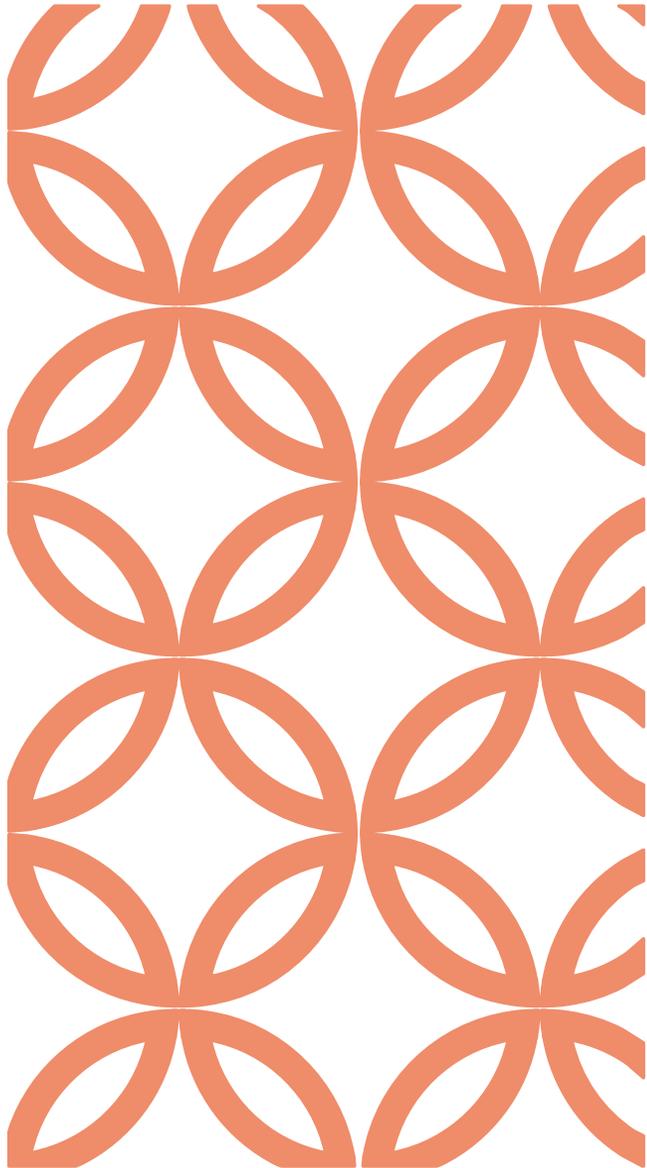
## Office of Conservatorship Management

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](http://ocm.nashville.gov)  
if you have a question or to report a concern.



**Amy Bryant**

Director, Office of Conservatorship Management

1 Public Square Ste. 601, Nashville, TN 37201  
(615) 880-3355

[ocm.Nashville.gov](http://ocm.Nashville.gov)

[amybryant@jisnashville.gov](mailto:amybryant@jisnashville.gov)

---

**CONTACT**