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Results of the Certified Professional Guardian Survey

Prepared by:

Tom George, Ph.D.
Washington State Center for Court Research
Administrative Office of the Courts

July, 2007

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1. RESPONDENTS

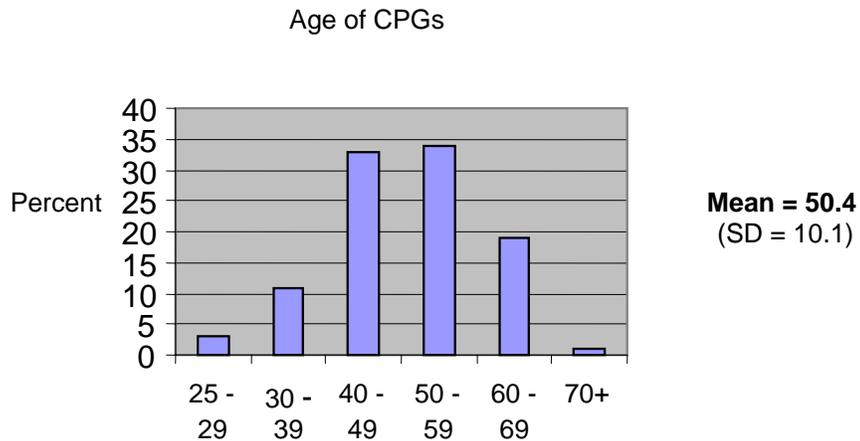
CPGs employed by an agency:	38
CPGs not employed by an agency:	79
<u>Respondents for CPG agencies:</u>	<u>16</u>
Total:	133

2. CHARACTERISTICS OF CPGS (n = 117)¹

2.A. Gender of CPGs

Female:	73%
Male:	27%

2.B. Age of CPGs



Note: CPGs employed by an agency are slightly younger (47.4 years) than CPGs not employed by an agency (51.8 years) ($p = .03$).

2.C. Race/Ethnicity of CPGs

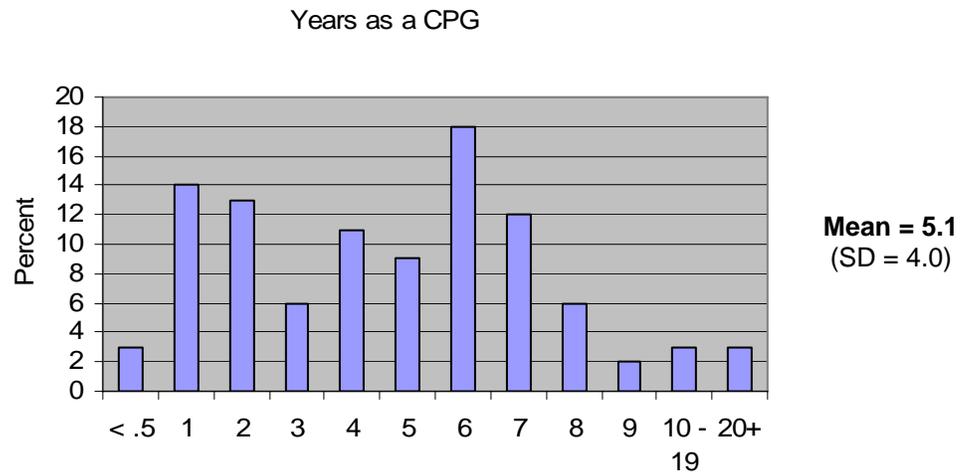
African-American:	2%
Asian/Pacific Islander:	1%
Hispanic/Latino:	1%
White, non-Hispanic:	95%
Other:	1%

¹ No statistically significant differences existed between agency and non-agency CPGs unless otherwise noted.

2.D. Language Fluency of CPGs

English:	100%
Spanish:	0%
Mandarin:	0%
Cantonese:	0%
Japanese:	0%
Korean:	0%
Tagalog:	0%
Vietnamese:	0%
Russian:	0%
German:	2%
Other:	7%

2.E. Number of Years as a CPG



2.F. Education of CPGs

2.F.1. Highest Level of Schooling

High school diploma/GED:	6%
Some college, no degree:	19%
Associates degree:	7%
Bachelors degree:	24%
Masters degree:	27%
Professional degree ² :	16%
Doctorate degree:	1%

(See also Appendix 1)

2.F.2. Areas of Study³

- For those CPGs whose highest degree was a Bachelors, 55% majored in psychology, social work, or social services.

² 100% of professional degrees (n = 18) were JDs.

³ A complete table of areas of study for CPGs with degrees is presented in Appendix 2.

- For those CPGs whose highest degree was a Masters, 41% received their degree in psychology, counseling, or social work, 12% received their degree in gerontology, and 12% received an MBA.

2.G. Licenses and Certifications of CPGs

See Appendix 1

2.H. Work Experience of CPGs

See Appendix 1

2.I. County of Residence of CPGs

King:	28%
Pierce:	13%
Spokane:	12%
Snohomish:	7%
Kitsap:	6%

Other counties 1-5%: Asotin, Benton, Chelan, Clallam, Clark, Cowlitz, Douglas, Grays Harbor, Island, Jefferson, Mason, Skagit, Thurston, Walla Walla, Whatcom, Whitman, Yakima

2.J. Aggregate Funds under the Control of Non-agency CPGs (n = 46)

Real Estate:

\$0:	67%
\$50K – 99K:	7%
\$100K – 249K:	11%
\$250K – 500K:	11%
> \$500K:	4%

Cash:

\$0:	21%
\$1 – 9K:	23%
\$10K – 19K:	9%
\$20K – 99K:	19%
\$100K – 199K:	9%
\$200K – 299K:	15%
> \$300K:	4%

Personal Property:

\$0:	61%
\$1 – 9K:	13%
\$10K – 19K:	11%
\$20K – 99K:	11%
> \$100K:	4%

Investments:

\$0:	47%
\$1K – 49K:	11%
\$50K – 99K:	4%
\$100K – 249K:	11%
\$250K – 500K:	15%
> \$500K:	13%

Annuities:

\$0:	70%
\$1K – 99K:	6%
\$100K – 249K:	17%
> \$250K:	7%

Total Amount:

\$0:	9%
\$1 – 99K:	33%
\$100K – 499K:	30%
\$500K – 999K:	15%
> \$1 million:	13%

3. CHARACTERISTIC OF CPG AGENCIES (n = 16)

3.A. Number of Agency Clients

Agency	# Clients w/ Person Guardian Only	# Clients w/ Estate Guardian Only	# Clients w/ Person and Estate Guardian	# Other Clients	Total # of Clients
1	13	3	1	0	17
2	12	0	7	1	20
3	21	1	1	0	23
4	0	0	8	17	25
5	0	0	26	0	26
6	4	6	25	0	35
7	0	28	12	0	40
8	--	--	--	--	43
9	2	0	41	0	43
10	0	0	65	0	65
11	--	--	--	--	69
12	--	--	--	--	110
13	78	2	52	0	132
14	110	8	2	0	135
15	--	--	--	--	200
16	34	17	24	525	600
	Mean = 22.8 Med = 8.0	Mean = 5.4 Med = 1.5	Mean = 22.0 Med = 18.0	Mean = 46.3 Med = 0.0	Mean = 98.8 Med = 43.0

3.B. Number of Employees Acting as Guardians

Mean: 1.9
Range: 0 – 3

3.C. Number of CPGs on Staff

Mean: 2.6
Range: 0 - 5

3.D. Agency Services Available in Different Languages (n = 15)

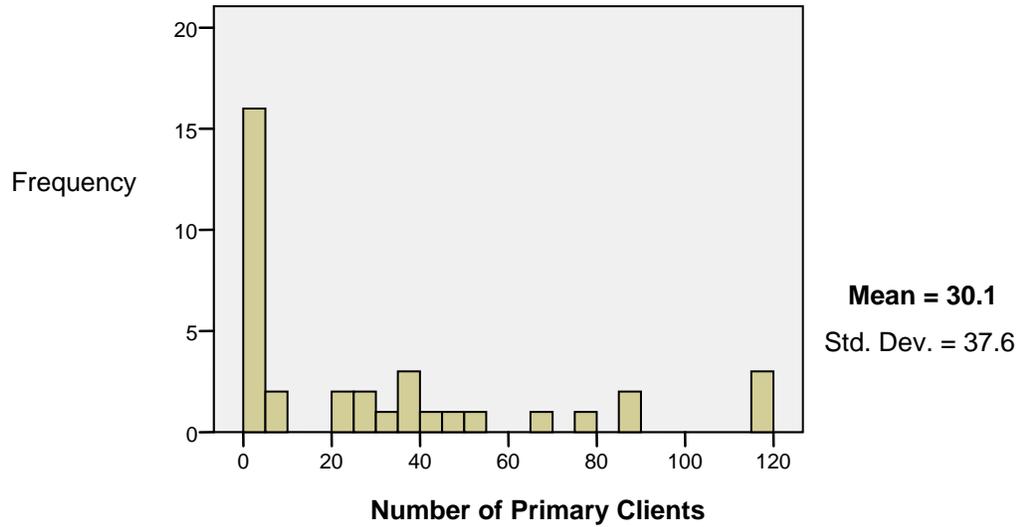
English only: 67% (10 agencies)
Spanish only: 7% (1 agency)
English and Spanish: 20% (3 agencies)
English and other: 7% (1 agency)

3.E. Average Amount of Aggregate Funds under Control of CPG Agencies (n = 11)

Real Estate: \$1,456,000
Cash: \$1,466,000
Personal Property: \$171,000
Investments: \$2,125,000
Annuities: \$2,106,000
Total Amount: \$7,324,000 (Median = \$900,000, Range \$0 - \$32 million)

4. NUMBER OF CLIENTS PER CPG

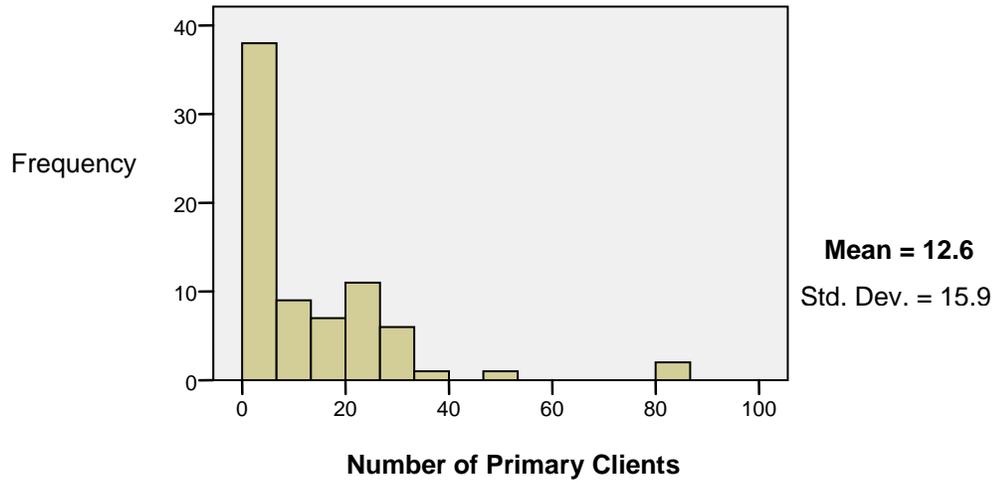
Agency CPGs (n = 37)



Percentage of Agency CPGs who reported having primary responsibility for:

- 0 clients = 19%
- 1 – 7 clients = 30%
- 20 – 50 clients = 30%
- 65 – 120 clients = 22%

Non-agency CPGs (n = 78)



Percentage of Non-agency CPGs who reported having primary responsibility for:

- 0 clients = 19%
- 1 – 10 clients = 40%
- 12 – 20 clients = 17%
- 21 – 50 clients = 22%
- 80 – 83 clients = 4%

Mean Number of Clients (and Standard Deviation) for Agency and Non-agency CPGs
by Type of Client

	Agency CPGs (n = 34)	Non-agency CPGs (n = 77)
Number of clients for whom CPG has primary responsibility ^{4,*} :	30.1 (37.6)	12.5 (15.9)
Number of additional clients with some responsibility as a trustee:	6.9 (18.5)	4.3 (17.7)
Number of additional clients with some responsibility as a personal representative:	1.8 (4.7)	.8 (3.5)
Number of additional clients with some responsibility as a case manager:	1.6 (8.7)	2.2 (14.3)
Number of additional clients with some responsibility in other capacity:	17.9 (32.9)	6.5 (35.1)
Total number of clients:	58.9 (46.8)	26.5 (45.9)

* Significant at $p < .001$.

Mean Number (and Standard Deviation) of Clients for Non-agency CPGs by Guardian Status

	Non-agency CPGs (n = 54)
Number of clients as Guardian of Person only:	2.7 (7.4)
Number of clients as Guardian of Estate only:	1.0 (1.3)
Number of clients as Guardian of Person and Estate:	10.8 (18.0)

⁴ One case in which a CPG reported 600 clients was removed from the analysis.

5. CHARACTERISTICS OF CLIENTS (n ~ 2,000)⁵

55 CPGs not employed by an agency provided information on approximately 850 clients, and 12 agencies provided information on approximately 1,150 clients, for a total of 2,000 clients.⁶

5.A. Guardian Status of Clients

Total Number of Clients Served by Non-agency CPGs and Agencies by Guardian Status:

	Non-agency CPGs (n = 54)	Agencies (n = 12)	Total
Number of clients with Person Guardian only:	145 (18%)	274 (24%)	419 (21%)
Number of clients with Estate Guardian only:	52 (6%)	65 (6%)	117 (6%)
Number of clients with Person and Estate guardian:	584 (72%)	264 (23%)	848 (43%)
Number of clients with other:	28 (3%)	554 (48%)	582 (30%)
Total	809	1157	1966

5.B. Gender of Clients

Total Number (and Percentage) of Clients Served by Non-agency CPGs and Agencies by Gender:

	Non-agency CPGs (n = 55)	Agencies (n = 12)	Total
Females:	432 (52%)	588 (51%)	1020 (51%)
Males:	405 (48%)	565 (49%)	970 (49%)
	837	1153	1990

Mean Number of Clients (and Standard Deviation) per Non-agency CPG or Agency by Gender:

	Non-agency CPGs (n = 55)	Agencies (n = 12)
Females:	7.9 (9.9)	49.0 (89.7)
Males:	7.4 (10.2)	47.1 (82.7)

⁵ Information on client characteristics was gathered from individual CPGs not employed by an agency and from representatives of CPG agencies.

⁶ The number of respondents and clients varies by question due to incomplete or inconsistent data from respondents.

5.C. Age of Clients

Total Number (and Percentage) of Clients Served by Non-agency CPGs and Agencies by Age:

	Non-agency CPGs (n = 55)	Agencies (n = 12)	Total
0 – 18:	43 (5%)	95 (8%)	138 (7%)
19 – 35:	102 (12%)	144 (12%)	246 (12%)
36 – 50:	84 (10%)	242 (21%)	326 (16%)
51 – 65:	134 (16%)	205 (18%)	339 (17%)
66 – 80:	335 (40%)	267 (23%)	602 (30%)
> 80:	148 (17%)	205 (18%)	353 (18%)
	846	1158	2004

Mean Number of Clients (and Standard Deviation) per Non-agency CPG or Agency by Age:

	Non-agency CPGs (n = 55)	Agencies (n = 12)
0 – 18:	.8 (2.5)	7.9 (17.1)
19 – 35:	1.9 (3.7)	12.0 (18.1)
36 – 50:	1.5 (2.5)	20.2 (34.0)
51 – 65:	2.4 (2.9)	17.1 (26.7)
66 – 80:	6.1 (10.3)	22.3 (44.2)
> 80:	2.7 (4.1)	17.1 (45.2)

5.D. Race/Ethnicity of Clients

Total Number (and Percentage) of Clients Served by Non-agency CPGs and Agencies by Race/Ethnicity:

	Non-agency CPGs (n = 54)	Agencies (n = 12)	Total
African-American:	39 (5%)	49 (4%)	88 (5%)
Asian/Pacific Islander:	157 (20%)	593* (52%)	750 (39%)
Hispanic/Latino:	6 (1%)	26 (2%)	32 (2%)
Native American/Eskimo/Aleut:	12 (2%)	46 (4%)	58 (3%)
White, non-Hispanic:	549 (69%)	319 (28%)	868 (45%)
Other:	35 (4%)	103 (9%)	138 (7%)
	798	1136	1934

* One agency reported 500 Asian clients.

Mean Number of Clients (and Standard Deviation) per Non-agency CPG or Agency by Race/Ethnicity:

	Non-agency CPGs (n = 54)	Agencies (n = 12)
African-American:	.7 (1.9)	4.1 (9.0)
Asian/Pacific Islander:	2.9 (8.2)	49.4 (142.6)
Hispanic/Latino:	.1 (.7)	2.2 (2.8)
Native American/Eskimo/Aleut:	.2 (.5)	3.8 (8.4)
White, non-Hispanic:	10.2 (15.2)	26.6 (34.1)
Other:	.7 (3.0)	8.6 (19.9)

5.E. Employment Status of Clients

Total Number (and Percentage) of Clients Served by Non-agency CPGs and Agencies by Employment Status:

	Non-agency CPGs (n = 54)	Agencies (n = 12)	Total
Employed part-time:	115 (14%)	430 (34%)	545 (26%)
Employed full-time:	39 (5%)	221 (17%)	260 (13%)
Unemployed, looking for work:	8 (1%)	117 (9%)	125 (6%)
Unemployed, not looking for work:	36 (4%)	16 (1%)	52 (3%)
Retired:	350 (44%)	122 (10%)	472 (23%)
Unable to work:	253 (32%)	366 (29%)	619 (30%)
	801	1272	2073

Mean Number of Clients (and Standard Deviation) by Employment Status:

	Non-agency CPGs (n = 54)	Agencies (n = 12)
Employed part-time:	2.1 (6.9)	35.8 (79.9)
Employed full-time:	.7 (2.3)	18.4 (38.4)
Unemployed, looking for work:	.2 (.6)	9.8 (30.1)
Unemployed, not looking for work:	.7 (2.8)	1.3 (3.4)
Retired:	6.5 (14.7)	10.2 (14.2)
Unable to work:	4.7 (7.5)	30.5 (37.4)

5.F. County Residence of Clients

Total Number of Clients Served by Non-agency CPGs and Agencies by County of Residence:

	Non-agency CPGs (n = 54)	Agencies (n = 12)	Total
Asotin:	11	0	11
Benton:	17	10	27
Chelan:	14	8	22
Clark:	62	5	67
Columbia:	1	0	1
Cowlitz:	20	0	20
Douglas:	2	0	2
Ferry:	0	2	2
Franklin:	1	3	4
Garfield:	1	0	1
Grant:	1	6	7
Grays Harbor	9	2	11
Island	6	2	8
Jefferson	6	2	8
King	230	590	820
Kitsap	69	16	85
Lewis	11	2	13
Mason	5	3	8
Okanogan	0	1	1
Pacific	24	0	24
Pierce	18	69	87
San Juan	0	2	2
Skagit	18	4	22
Skamania	0	1	0
Snohomish	45	61	106
Spokane	110	119	229
Stevens	1	2	3
Thurston	19	38	57
Wahkiakum	0	1	1
Walla Walla	18	5	23
Whatcom	38	3	41
Whitman	20	0	20
Yakima	6	22	28
	783	979	1761

Note. No clients were reported as residing in the following counties: Clallam, Kittitas, Klickitat, Lincoln, and Pend Oreille.

5.G. Living Arrangements of Clients

Total Number (and Percentage) of Clients Served by Non-agency CPGs and Agencies by Living Arrangement:

	Non-agency CPGs (n = 54)	Agencies (n = 12)	Total
Own a home or condo and live alone:	23 (3%)	171 (16%)	194 (10%)
Own a home or condo and live with others:	28 (4%)	239 (22%)	267 (14%)
Rent a home or apartment and live alone:	38 (5%)	66 (6%)	104 (6%)
Rent a home or apartment and live with others:	38 (5%)	174 (16%)	212 (11%)
Live in a shared residential facility:	273 (36%)	222 (20%)	495 (27%)
Live in a locked ward or nursing home:	321 (42%)	176 (16%)	497 (27%)
Homeless:	1 (0%)	12 (1%)	13 (1%)
Other:	38 (5%)	28 (3%)	66 (4%)
	760	1088	1848

Mean Number of Clients (and Standard Deviation) per Non-agency CPG or Agency by Living Arrangement:

	Non-agency CPGs (n = 54)	Agencies (n = 12)
Own a home or condo and live alone:	.4 (.9)	14.3 (45.9)
Own a home or condo and live with others:	.5 (1.1)	19.9 (57.0)
Rent a home or apartment and live alone:	.7 (1.2)	5.5 (14.1)
Rent a home or apartment and live with others:	.7 (1.5)	14.5 (24.6)
Live in a shared residential facility:	5.0 (6.7)	18.5 (13.3)
Live in a locked ward or nursing home:	5.9 (11.8)	14.7 (15.0)
Homeless:	.0 (.1)	1.0 (1.9)
Other:	.7 (4.1)	2.3 (5.9)

5.H. Sources of Additional Assistance (Other than Money) for Clients

Total Number (and Percentage) of Clients Served by Non-agency CPGs and Agencies by Source of Assistance:

	Non-agency CPGs (n = 52)	Agencies (n = 11)	Total
Partner or relatives only:	130 (20%)	588 (52%)	718 (40%)
Friends or neighbors only:	5 (1%)	65 (6%)	70 (4%)
Partner/relatives and friends/neighbors:	24 (4%)	6 (1%)	30 (2%)
Does not receive assistance from any partner, relative, friend, or neighbor:	506 (76%)	478 (42%)	984 (55%)
	665	1137	1802

Mean Number of Clients (and Standard Deviation) per Non-agency CPG or Agency by Source of Assistance:

	Non-agency CPGs (n = 52)	Agencies (n = 11)
Partner or relatives only:	2.5 (8.0)	53.5 (116.9)
Friends or neighbors only:	.1 (.4)	5.9 (18.0)
Partner/relatives and friends/neighbors:	.5 (1.8)	.6 (1.5)
Does not receive assistance from any partner, relative, friend, or neighbor:	9.7 (18.0)	43.5 (65.5)

5.I. Income of Clients

Total Number (and Percentage) of Clients Served by Non-agency CPGs and Agencies by Income Bracket:

	Non-agency CPGs (n = 50)	Agencies (n = 12)	Total
< \$1,000/month:	299 (44%)	185 (17%)	484 (28%)
\$1,000 - \$2,000/month:	160 (23%)	205 (19%)	365 (21%)
\$2,001 - \$3,000/month:	94 (14%)	490 (46%)	584 (33%)
> \$3,000/month:	132 (19%)	180 (17%)	312 (18%)
	685	1060	1745

Mean Number of Clients (and Standard Deviation) per Non-agency CPG or Agency by Income Bracket:

	Non-agency CPGs (n = 50)	Agencies (n = 12)
< \$1,000/month:	6.0 (10.7)	15.4 (17.3)
\$1,000 - \$2,000/month:	3.2 (6.9)	17.1 (37.0)
\$2,001 - \$3,000/month:	1.9 (3.2)	40.8 (104.4)
> \$3,000/month:	2.6 (5.3)	15.0 (31.1)

5.J. Assets of Clients

Total Number (and Percentage) of Clients Served by Non-agency CPGs and Agencies by Assets Bracket:

	Non-agency CPGs (n = 51)	Agencies (n = 12)	Total
< \$10,000:	441 (71%)	236 (24%)	677 (42%)
\$10,000 - \$100,000:	85 (14%)	352 (36%)	437 (27%)
\$100,001 - \$500,000:	56 (9%)	287 (29%)	343 (21%)
\$500,001 - \$1,000,000:	23 (4%)	64 (7%)	87 (5%)
> \$1,000,000:	19 (3%)	41 (4%)	60 (4%)
	624	980	1604

Mean Number of Clients (and Standard Deviation) per Non-agency CPG or Agency by Assets Bracket:

	Non-agency CPGs (n = 51)	Agencies (n = 12)
< \$10,000:	8.7 (13.9)	19.7 (18.5)
\$10,000 - \$100,000:	1.7 (3.3)	29.3 (72.5)
\$100,001 - \$500,000:	1.1 (1.6)	23.9 (63.0)
\$500,001 - \$1,000,000:	.5 (.9)	5.3 (11.1)
> \$1,000,000:	.4 (1.1)	3.4 (7.0)

5.K. Clients with Special Needs Trusts

Non-agency CPGs (n = 54)

Total number of clients served with special needs trusts = 74

Mean number of clients (and SD) per non-agency CPG with special needs trusts = 1.4 (2.0)

Percentage of Non-agency CPGs with at least one client with a special needs trust = 50%

Agencies (n = 12)

Total number of clients served with special needs trusts = 290

Mean number of clients (and SD) per agency with special needs trusts = 24.2 (56.0)

5.L. Clients with Living Trusts

Non-agency CPGs (n = 54)

Total number of clients served with living trusts = 18

Mean number of clients (and SD) per non-agency CPG with living trusts = .3 (.8)

Percentage of Non-agency CPGs with at least one client with a living trust = 22%

Agencies (n = 12)

Total number of clients served with living trusts = 75

Mean number of clients (and SD) per agency with living trusts = 6.3 (14.9)

5.M. Clients with Powers of Attorney (POA) along with Guardianship

Non-agency CPGs (n = 54)

Total number of clients served with POAs along with guardianship = 17

Mean number of clients (and SD) per non-agency CPG with POAs along with guardianship = .3 (.9)

Percentage of Non-agency CPGs with at least one client with a POA along with guardianship = 17%

Agencies (n = 12)

Total number of clients served with POAs along with guardianship = 15

Mean number of clients (and SD) per agency with POAs along with guardianship = 1.25 (2.0)

5.N. Clients on Medicaid

Non-agency CPGs (n = 54)

Total number of clients served on Medicaid = 562

Mean number of clients (and SD) per non-agency CPG on Medicaid = 10.2 (16.0)

Percentage of Non-agency CPGs with at least one client on Medicaid = 87%

Agencies (n = 12)

Total number of clients served on Medicaid = 420

Mean number of clients (and SD) per agency on Medicaid = 35.0 (36.2)

5.O. Clients Exploited Financially (as defined under RCW 74.34)

Non-agency CPGs (n = 54)

Total number of clients served who have been exploited financially = 144

Mean number of clients (and SD) per non-agency CPG who have been exploited financially = 2.62 (4.5)

Percentage of Non-agency CPGs with at least one client who has been exploited financially = 56%

Agencies (n = 12)

Total number of clients served who have been exploited financially = 239

Mean number of clients (and SD) per agency who have been exploited financially = 19.9 (35.6)

5.P. Clients Physically, Sexually, or Mentally Abused or Neglected (as defined under RCW 74.34)

Non-agency CPGs (n = 54)

Total number of clients who have been abused or neglected = 97

Mean number of clients (and SD) per non-agency CPG who have been abused or neglected = 1.8 (3.3)

Percentage of Non-agency CPGs with at least one client who has been abused or neglected = 47%

Agencies (n = 12)

Total number of clients served who have been abused or neglected = 216

Mean number of clients (and SD) per agency who have been abused or neglected = 18.0 (26.1)

5.Q. Psychological Issues of Clients

Clients Served by Non-agency CPGs (n = 54)

	Total # of Clients Served by CPGs:	Mean # of Clients (and SD) per CPG:	% CPGs with at Least One Client:
Developmental disorder (e.g., autism, mental retardation):	75	1.4 (4.3)	40%
Dementia or other cognitive disorder (e.g., Alzheimer's)	218	4.0 10.7	57%
Schizophrenia or other psychotic disorder:	35	.7 (1.3)	26%
Mood disorder (e.g., depression, bipolar):	45	.8 (2.8)	26%
Anxiety disorder:	41	.8 (2.2)	28%
Sleep disorder (e.g., insomnia):	76	1.4 (3.1)	41%
Adjustment disorder:	85	1.6 (4.4)	43%
Personality disorder (e.g., antisocial, borderline)	183	3.4 (5.2)	50%
Other psychological diagnosis:	174	3.2 (5.0)	57%
Multiple psychological diagnoses:	245	4.5 (6.6)	72%
Taking prescription medication for a psychological condition:	393	7.3 (8.0)	87%
Receiving treatment for a psychological condition or have received treatment while under guardianship:	151	2.8 (4.5)	70%
Currently have psychological and/or behavioral problems but not receiving treatment:	79	1.5 (4.1)	32%
Currently receiving treatment for substance abuse or have received treatment while under guardianship:	20	.4 (1.1)	20%
Have substance abuse problems but not receiving treatment:	8	.2 (.4)	13%
Have been hospitalized for psychiatric treatment while under guardianship:	62	1.2 (1.7)	56%

Clients Served by Agencies (n = 12)

	Total # of Clients with Diagnosis Served by Agencies:	Mean # of Clients (and SD) per Agency with Diagnosis:
Developmental disorder (e.g., autism, mental retardation):	176	16.0 (27.1)
Dementia or other cognitive disorder (e.g., Alzheimer's)	148	13.5 (18.9)
Schizophrenia or other psychotic disorder:	38	3.5 (6.8)
Mood disorder (e.g., depression, bipolar):	25	2.3 (4.8)
Anxiety disorder:	54	4.9 (7.6)
Sleep disorder (e.g., insomnia):	93	8.5 (15.2)
Adjustment disorder:	121	11.0 (26.6)
Personality disorder (e.g., antisocial, borderline)	203	18.5 (31.4)
Other psychological diagnosis:	117	10.6 (18.6)
Multiple psychological diagnoses:	252	22.9 (26.0)
Taking prescription medication for a psychological condition:	387	32.3 (34.2)
Receiving treatment for a psychological condition or have received treatment while under guardianship:	240	20.0 (21.2)
Currently have psychological and/or behavioral problems but not receiving treatment:	138	11.5 (25.1)
Currently receiving treatment for substance abuse or have received treatment while under guardianship:	108	9.0 (27.2)
Have substance abuse problems but not receiving treatment:	41	3.4 (6.7)
Have been hospitalized for psychiatric treatment while under guardianship:	75	6.3 (6.0)

5.R. Medical Issues of Clients

Clients Served by Non-agency CPGs (n = 53)

	Total # of Clients Served by CPGs:	Mean # of Clients (and SD) per CPG:	% CPGs with at Least One Client:
Heart disease:	181	3.4 (5.7)	66%
Cancer:	26	.5 (.9)	30%
Cerebrovascular disease (stroke):	79	1.5 (2.4)	55%

Chronic lower respiratory disease (e.g., emphysema):	44	.9 (1.9)	35%
Diabetes mellitus:	79	1.5 (2.2)	53%
Kidney disease:	18	.3 (.6)	26%
Chronic liver disease or cirrhosis:	27	.5 (.9)	30%
Parkinson's disease:	22	.4 (.7)	32%
HIV/AIDS:	4	.1 (.3)	8%
Traumatic head injury:	37	.7 (.9)	47%
Multiple medical issues:	571	10.8 (18.1)	92%
On prescription medications for a medical condition:	535	9.9 (8.7)	87%
Have combination of medical and psychological issues that require care:	480	9.1 (17.8)	92%
Use adaptive devices (e.g., wheelchairs, walkers, hearing aids, prostheses):	382	7.1 (9.7)	91%

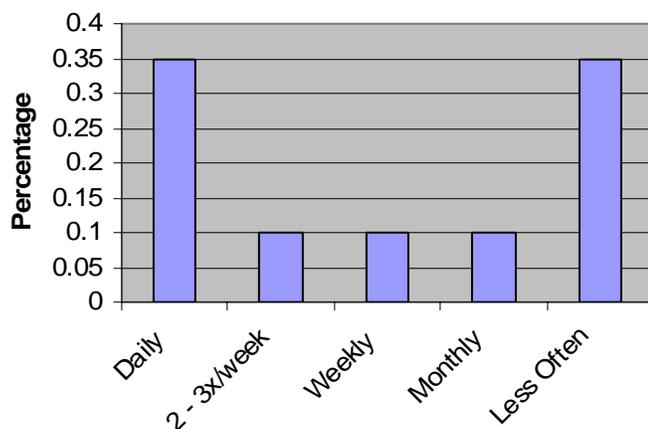
Clients Served by Agencies (n = 10)

	Total # of Clients with Diagnosis Served by Agencies:	Mean # of Clients (and SD) per Agency with Diagnosis:
Heart disease:	196	19.6 (24.1)
Cancer:	40	4.0 (7.5)
Cerebrovascular disease (stroke):	71	7.1 (6.4)
Chronic lower respiratory disease (e.g., emphysema):	40	4.0 (3.8)
Diabetes mellitus:	87	8.7 (14.8)
Kidney disease:	40	4.0 (6.6)
Chronic liver disease or cirrhosis:	24	2.4 (3.1)
Parkinson's disease:	65	6.5 (11.0)
HIV/AIDS:	2	.2 (.6)
Traumatic head injury:	87	7.3 (13.6)
Multiple medical issues:	556	46.3 (54.1)
On prescription medications for a medical condition:	822	68.5 (83.1)

Have combination of medical and psychological issues that require care:	725	60.4 (85.2)
Use adaptive devices (e.g., wheelchairs, walkers, hearing aids, prostheses):	512	42.7 (55.5)

5.S. Medical Care of Clients

Frequency of Clients' Required Medical Care or Monitoring:



Client Hospitalizations for a Medical Condition: Non-agency CPGs (n = 51)

	Total # of Clients Served by CPGs:	Mean # of Clients (and SD) per CPG:	% CPGs with at Least One Client:
Hospitalized within past 30 days:	119	2.3 (3.7)	55%
Hospitalized within past year, but not past 30 days:	170	3.3 (4.4)	72%
Hospitalized within past 5 years, but not past year:	180	3.5 (11.2)	49%
Total (hospitalized within past 5 years):	469	9.2 (15.8)	94%

Client Hospitalizations for a Medical Condition: Agencies (n = 12)

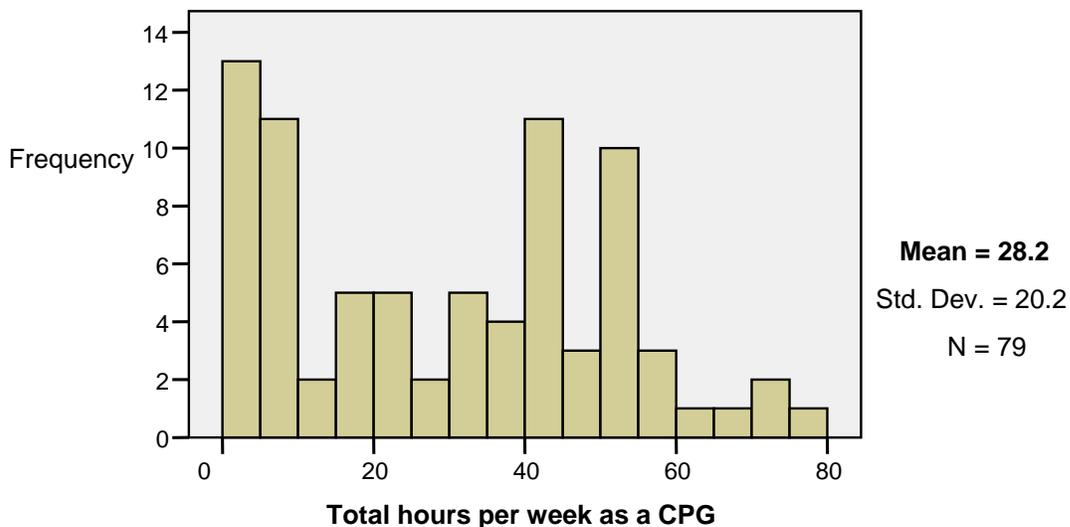
	Total # of Clients Served by Agencies:	Mean # of Clients (and SD) per Agency:
Hospitalized within past 30 days:	165	13.8 (29.0)
Hospitalized within past year, but not past 30 days:	208	17.3 (25.9)
Hospitalized within past 5 years, but not past year:	121	10.1 (11.6)
Total (hospitalized within past 5 years):	494	41.2 (50.2)

6. CPG ACTIVITIES

6.A. Percentage of CPGs (n = 85) Who Perform Activities or Contract with Others for Services for at Least One of Their Clients

	% of CPGs Who Perform Activity	% of CPGs Who Contract for Service
Assist with Activities of Daily Living:	2%	65%
Shop or run errands:	62%	58%
Engage in social activities or provide psychological support:	58%	62%
Inspect the home, facility, or residential unit:	83%	24%
Maintain the home or residential unit (e.g., clean, do laundry):	6%	60%
Perform home repairs:	8%	48%
Provide transportation for activities or appointments:	55%	67%
Manage medications:	12%	61%
Monitor medical equipment or devices:	18%	48%
Perform health check-ups (e.g., take vital signs, draw blood):	0%	56%
Manage money or assist with financial matters:	85%	55%
Provide legal advice or assistance:	18%	62%

6.B. Amount of Time Spent in CPG Activities



Note: 5 respondents who reported 0 hours per week serving as a CPG were not included in this analysis.

Specific CPG Activities	Mean # of Hours per Week	Standard Deviation
Assisting with Activities of Daily Living:	0.2	0.9
Shopping or running errands:	2.1	3.0
Engaging in social activities or providing psychological support:	3.6	6.5
Making appointments:	1.5	2.1
Inspecting the home, facility, or residential unit:	3.4	5.6
Maintaining the home or residential unit (e.g., clean, do laundry):	0.2	1.0
Performing home repairs:	0.1	0.5
Providing transportation for activities or appointments:	1.7	2.7
Managing medications:	0.3	0.9
Monitoring medical equipment or devices:	0.2	1.0
Performing health check-ups (e.g., take vital signs, draw blood):	0.0	0.1
Managing money or assist with financial matters:	7.8	10.1
Providing legal advice or assistance:	1.0	4.2

Planning, Conferencing, or Consulting		
Family or friends of clients:	2.1	2.9
Residential staff or others providing care where clients currently reside:	3.6	5.6
Staff or others at possible future living facilities:*	0.6	1.0
Medical, dental, or other health professionals not at residence:*	1.5	1.8
Legal professionals:	1.7	3.0
Financial professionals:	0.8	1.3
Social service agencies:	2.2	3.5
Administrative Activities		
Completing required paperwork:	6.6	8.7
Administrative meetings:	1.4	2.1
In-service trainings/continuing education:	0.6	0.8
Supervisory duties:	2.9	7.6
Travel to visit clients, consultants, or agencies:	5.5	8.2

*Note: Agency CPGs and non-agency CPGs were similar on all variables except *planning, conferencing, or consulting with future residential staff* and *planning, conferencing, and consulting with health professionals*. On both variables, agency CPGs reported more time spent in these activities than non-agency CPGs.

6.C. Frequency of Engagement in CPG Activities (n = 96)

	Daily	Weekly	Monthly	A few times a year	Yearly or less often	Never
Contact an attorney to file a guardianship report:	2%	11%	23%	26%	21%	16%
Prepare an annual or triennial guardianship report:	2%	15%	29%	30%	17%	7%
Prepare a care plan:	0%	8%	28%	33%	16%	15%
Prepare an inventory report:	0%	5%	25%	35%	25%	9%
Contact an attorney to file a claim:	0%	2%	10%	14%	33%	41%
Contact an attorney to prepare a trust:	0%	0%	3%	24%	24%	49%
Contact an attorney to respond to a legal notice:	1%	5%	8%	21%	34%	30%
Visit clients at their residence:	12%	31%	34%	9%	6%	8%

Shop for personal items or other errands:	0%	26%	23%	20%	5%	27%
Attend care conferences:	1%	11%	33%	29%	14%	12%
Arrange for interpreters:	0%	0%	2%	9%	16%	73%
Relocate a client to another residence:	0%	0%	4%	35%	36%	25%
Discuss client's status with a partner or relative:	9%	20%	29%	22%	2%	18%
Perform emergency visits or respond to a crisis:	3%	16%	31%	29%	9%	12%
Request medical records:	0%	6%	19%	42%	19%	14%
Make a health care decision for treatment, therapy, or medical procedure:	9%	25%	28%	17%	4%	16%
Deliver money:	4%	21%	34%	10%	3%	27%
Deposit or withdraw funds:	10%	25%	38%	7%	3%	17%
Reconcile bank statements:	5%	14%	56%	2%	1%	22%
Complete an application or benefit review for social security benefits:	2%	1%	26%	30%	26%	16%
Complete an application or eligibility review for state funded services:	3%	4%	25%	30%	21%	18%
Complete an application or eligibility review for veteran's benefits:	2%	2%	8%	24%	25%	39%
Complete an application or eligibility review for Medicare services:	2%	4%	13%	23%	36%	22%
Complete tax returns:	0%	0%	3%	17%	39%	41%

7. OPEN-ENDED RESPONSES

<p>7.A. What other important activities do you do for your clients that were not addressed in this questionnaire?</p>
<p>argue with doctors- explain the guardians role to all</p>
<p>I am a paralegal working for an attorney who specializes in Elder Law. I assist non-professional guardians prepare annual reports and prepare initial guardianship petitions.</p>
<p>Sell property if needed. Search for assets the client may not remember they have. Try to reclaim benefits or assets that have been taken from the client. Always protect the clients assets and attempt to preserve everything they have.</p>
<p>Our agency is set up to serve clients as a team. As Executive Director, I oversee ALL guardianship client cases meeting weekly with assigned CPG's and support staff. This process includes brainstorming what type of things will enhance the quality of the individuals' lives. These items include: Trips (both day & week), family visits, renewing estranged family relationships.</p>
<p>Know pro bono activities and provide when funds are not available, but certain components are needed.</p>
<p>Work with DSHS case managers, nurses, CNA's, make Link Plus bus appointments, set up Link Plus for clients, purchase burial plans, investigate client investments, change investments to living trusts, pay client bills, attend court with clients on legal issues, be on call 24/7.</p>
<p>I am an attorney who primarily represents CPG's and Petitioners for Appointment of Guardian and advise them according to each case.</p>
<p>Process personal mail; sell or otherwise dispose of personal property; deal with creditors</p>
<p>Budgeting, reviewing and approving/disapproving disbursement requests. Completing annual trust reports and attending court hearings for approval of reports. Communicating with clients/family regarding his/her needs.</p>
<p>I attend birthday celebrations, take them into the community for social interaction.</p>
<p>I work at a Professional Guardian Agency with several departments that handle financial, property management issues. My focus is case management/care need issues. I work collaboratively with the Financial and Property Mgmt and communicate concerns as they arise. I offer a practical application and perspective to staff who may not have direct contact with the client.</p>
<p>educate spouse about how to handle mood swings and anger of Alzheimer's patient; empathic listening</p>
<p>Recover funds in cases of exploitation (i.e., investigations, police reports, lawsuits, etc.), search for missing wards (includes police reports), get wards out of jail/address legal issues related to criminal activities, facilitate mental health treatment (in-patient), resolve conflicts among family members, act as personal representative for wards who are intestate, sometimes am named as PR for wards who have no close family members, address financial difficulties (file bankruptcies, send letters to creditors, set up payment schedules, budgeting, etc.), complete advance medical directives (POLST), arrange for pre-paid funerals, apply for entitlement programs (VA pensions, Medicaid), appeal unfavorable decisions by funding sources, address incorrect billings, arrange interventions for substance abusers, make investments</p>
<p>A lot of time is spent dealing with other agencies that serve the IP. Mental Health issues also further complicate the duties a CPG is to carry out. Also Mental Health clients (schizophrenia, bi-polar) take up a lot more time then wards with Alzheimer's/dementia.</p>
<p>Professional guardian wears many hats; as a consultant, administrator, friend, manager, confidant, tax preparer, investor, social worker, representative, debator, and most of all, a liaison between your client and world. Each client has individual needs, special needs, and different needs than the others. What a guardian is not: direct provider, family member, priest, doctor, or professional in the traditional definition. We are there to speak for, advocate for and defend the individual rights of someone who cannot speak for</p>

themselves.
I worked for guardianship agencies for 7+ years. I currently work as a paralegal for a law firm handling many guardianships, special needs trusts, probates, estate planning, etc. I do not have direct fiduciary responsibility for any clients at this time. Currently, besides basic paralegal work, I assist non-CPG clients with preparing inventories, care plans, budgets, and annual reports. I consult with clients over estate- and care-management matters, court reporting requirements, and fiduciary duties.
Talk with and listen to client regarding their wants, needs, quality of life, past, desires for themself.
Respond to questions from family or client
review clients records (medical and social)at each facility - weekly perform environmental safety checks at facilities - weekly
The time it takes to research issues related to your client care needs, legal needs, financial needs.
Review cases for possible litigation for abuse, exploitation or medical mismanagement; arrange for medical-legal experts to assess care; mediate disputes with family and other caregivers and other legal services
Power of Attorney not Guardian for most of my clients Consultation with other guardians
My firm routinely conducts extensive forensic reviews of financial account histories in order to recover assets stolen from vulnerable adults. This information is routinely shared with law enforcement and has resulted in several convictions for criminal financial abuse.
Arrange for burial. Set up hospice if needed. Which lately I have been having to do on a monthly basis.
Work on DSHS eligibility, application and research for providers/services accepting DSHS, appeal cancellation of services. Research benefits coverage (HMO's, Medicaid, Long-term care, supplement and life insurance policies); funeral planning; POLST forms; Personal property issues; Prepare correspondence to involved professionals, family re: care plan details, areas of concern;
Address crises she creates with other residents at her current address. I have researched and arranged for free or low-cost veterinary services for her pets. I have transported her pets to/from veterinary services. I have assisted the county animal control officer in controlling, removing, the ward's pets when she abandoned them at her previous residence.
Because my primary role is Chaplain in an agency that oversees 43 guardianships, my role is to visit with IP with or without Guardian. I am standby for all persons. It is an unusual role because I try to stay current and assist primary guardians where needed, i.e. pastoral or 'morale' visits, attend to the sick and dying, meeting with residence or agency regarding memorial services, performing memorials (unpaid), and supporting guardians in the psychological responsibilities in certain cases. I also stand in as guardian on vacations of guardians if necessary.
I provide the CPG level oversight for an agency and all clients, which includes consulting medical professionals, providing informed medical consent, approving POLST forms, end of life planning, consulting with family members, communication with attorneys, attendance at court hearings, coordination with community professionals, working with realtors and attorneys on real estate transactions (sale of client home or purchase of residence), prepare petitions for approval of home repairs, working with attorneys to get court authority to make repairs, expend funds for any purpose, work with loan officers to obtain loans/reverse mortgages for clients. negotiate or payoff creditors, review credit reports, asset marshaling on new cases or newly discovered assets. confer with financial professional regarding investment accounts/securities. work with transfer agents to liquidate investments as approved by court. review proposed investment plans, monitor assets. determine filing status for fed. income taxes, work with CPAs to provide all tax info/1099s. secure and maintain professional liability insurance, work with business accountant to maintain sufficient funds to pay guardianship staff, review and approve all court reports prior to filing, work with bank officials, detectives and prosecutors to recover assets for financially exploited clients. Supervise staff on routine guardianship matters and Personal Care Plans. Supervise client accounts manager re management of client income and expenses, monthly budgets.

confer with GAL's petitioners re prospective new cases. participate in mediations or settlement conferences, approval settlements. Probably several other things I can't think of right now.
With background in longterm care specializing dementia. I have tried to provide support for the facilities in which my clients reside. Giving tools to enhance the lives of their residents which does the same for my clients. I am available for the needs of my clients personally 24/7.
Participate in vocational planning that involves DVR and DDD. Interact with biological parents
Protect IP from persons who would exploit their vulnerabilities; Act as contact between IP and court for 'infraction' charges (non-criminal so the IP is not entitled to court appointed lawyer and can't afford to hire one); Act as intermediary when IP's actions result in discontinuance of public services; Cancel purchases for which IP cannot pay and work with persons expecting money that cannot be paid; And, last, but not least -- work practically for free because I write off far more hours of work than I will ever be compensated for.
My staff and I made visits to every client at a minimum of once every two weeks, maintained phone contact for emergencies, attended physician appointments, psychiatric appointments, shopped, paid bills, monitored care for all clients. We arranged for transportation for clients, worked with adult family home care providers, nursing home providers, and apartment managers. We tended clients on stressful visits to physicians and other professionals, counseled families on the changes in their family member's change in status. We made literally life and death decisions, signed POLST forms, DNR forms and tried to ascertain client best interests with information from family, friends, and professionals in determining care needs when a client was unresponsive. We stayed with people as they died. We set up funerals and burial services for people who had no one else to provide for them. We developed a large resource list of good providers of services to our clients.
Being available for contact from clients, care providers, family etc
Create resources that do not already exist when my clients have needs that are not met by existing resources--which is often, i.e. talk to professionals, come up with intervention options, essentially develop a community-based treatment plan.
Complete reporting for Employment Security and Labor and Industries for paid caregivers. Compute taxes and pay caregivers. Contact vocational providers.
Make sure continuity of care is complete. Often times requiring multiple contacts with multiple physicians and care providers. Research with pharmaceutical reviews. Keep up with changing rules in DSHS and SSA systems.
act as go between to protect IP from harassment, sales, collectors etc. to be on call 24/7.
Being a Mother, sister, Daughter and Friend and just holding a lonely persons hand
advocating a teaching providers about community resources
I am the backup guardian for a CPG agency and am available to assist the primary guardian at any time pursuant to regulation.
Confer with the VA; obtain court approval to unblock funds for care or emergency expenses; bail them out of jail, hire counsel for criminal offenses.
STAND AS A BUFFER BETWEEN THEM AND FAMILY. BE THERE WHEN THEY NEED A FRIEND. BURIAL ARRANGEMENTS FINANCIAL PLANNING
Considerable time dealing with facilities/agencies to obtain optimal care for the wards.
I am a presence in my Ward's lives even though they probably don't realize they have a Guardian. I am available to the staff of the Facility where my Wards reside.
Often times my clients just want to touch base with me for reassurance or sometimes even social issues. This is not really billable time and not measurable.

7.B. What other specific knowledge, skills, or abilities do you feel are necessary to be a CPG?
a crystal ball common sense sense of humor patience empathy
Multicultural understanding of diverse populations.
Empathy and compassion The ability to meet the client where he/she is at and develop a trust relationship. Evaluate the client's environment and work with staff to improve. Manage behavior problems and find non-medical solutions whenever possible. Allow the client as much normalcy and 'power' as possible. (e.g. allowing him/her to keep a checkbook if it is safe and/or allowing the client to have money to spend.) Look for ways to enhance quality of life.
Good bookkeeping/accounting/money management skills Good Report writing skills Time Management/Task Focus Ability to work with families Ability to interact with nursing/adult home staff High Energy Level Work Ethic
Need to have some healthcare and financial background, and common sense! Need to be able to work with Social services, DSHS, VA, and other retirement pension agencies. They all have different requirements and guidelines, need to be familiar with all! Need to be well organized and very detailed oriented. Time management skills are a must
1.) Core Knowledge of guardianships. 2.) Financial skills. 3.) Health care skills. 4.) Ability to perform cost benefit analysis.
Working knowledge of Washington State system; DDD, HCS, DSHS, APS, etc.
financial management relationship skills assessment process patience acceptance of people as they are etc.
Community resources Networking Special needs trusts
Need to have dealt with elderly people. Need to be able to be assertive in dealing with clients, nursing staff, administrators of nursing facilities. Have a working knowledge of banking. Need to have empathy for clients issues. MUST BE HONEST. Need to realize that this is a 24/7 job and not a 9-5 and that once in awhile you will end up at the ER on New Year's morning at 1 a.m. MUST BE ABLE TO MULTI-TASK. I don't believe that having a college degree is necessary however having experience is a must.
Understanding of medical and mental health conditions. Ability to be flexible and work with multiple personalities.
Ability to have excellent boundaries and communication skills. Ability to work with all types of people. Having a background in Marriage and Family Systems helps.
One must have clear communication, compassion, organization, and understand 'substitute decision making' concept.
maintenance of clear personal boundaries, negotiation skills, writing skills, collaborative skills, ability to translate medical and legal terms/decisions for clients
High school diploma is NOT enough. Need to have at least an AA degree, or be trained through a certificate program.
organized, care of detail
Ability to work with clients/family members on a personal level as well as financial. Ability to create a budget.
Sense of humor. Excellent psycho-social assessment skills, strong resource knowledge of the social service agencies, mental health system, community resources and individual community contacts. Knowledge and respect of other cultures, both clients and caregivers. Developing collaborative teams to support client. Working knowledge about residential care options. Understanding of the how the health

<p>care system works, Medicaid, Medicare, Insurances. Basic medical knowledge, understanding of medical language, different specialists, what they do, how to refer. Integrity to stand for what is best for the client and act on it. Working with difficult client behaviors, and difficult family members, and having firm and clear boundaries. Flexibility to adapt to whatever a situation brings, including handling client incontinence problems, behavioral problems in public settings. Leadership ability, bring together multiple players in care conference setting to develop plans of care. Ability to engage and motivate people to do their best for your client. Comfortable with dying and death. Sales ability</p>
<p>Basic common sense, thrift, integrity.</p>
<p>understanding that most 'emergencies' aren't. taking time to think through situations, waiting for intuition to catch up with details learning how not to be cowed by attorneys or 'the system'</p>
<p>A CPG needs to continue to learn about issues that impact their client's health and environment. CPG should stay abreast to current and every changes laws that impact their clients.</p>
<p>Financial Management, Flexibility, Be able to work with diverse cultures and opinions</p>
<p>Knowledge of all sorts of disabilities in addition to dementia and other geriatric issues, conflict resolution skills, broad knowledge of available community resources and how to access them, familiarity with funding sources and entitlement programs and how to work with them, knowledge of insurance and legal issues, experience and knowledge about mental health/ substance abuse/developmental disabilities</p>
<p>Knowledge of the other social service agencies and a working relationship with them. Familiarity with prescription drugs and medical issues that affect senior citizens. A working knowledge of finances and real estate. Also a familiarity with the legal/court system.</p>
<p>Each client has special needs, it is difficult to define what specific qualifications a guardian needs. My background is as a generalist, and I feel fortunate to have been educated in those terms, it has served me well in public health and in guardianship. Human skills are a necessity; patience, common sense, communication skills both verbal and written, as well as the ability to mediate, listen and yet be firm in your responsibilities. Being able to adapt to each new situation is essential. Above all, one definitely needs a terrific sense of humor!!!</p>
<p>The ideal guardian would have all of the following degrees and credentials: CPA, MD, JD, CFI, MSW, PhD in Psychology, and a real estate broker's license. This person, thankfully, does not exist, because their hourly rate would be too high to be an effective CPG. A CPG, on the other hand, does need some general knowledge from all of these fields to be effective as a guardian. Obviously, there are no degree programs for this type of generalized knowledge about everything from nursing home care to taxes to navigating the vast array of government bureaucracies. It is my belief that this type of knowledge only comes from years of practice, which presents an obvious paradox. How does one create an effective certification process to only allow well-qualified individuals into the profession, when the only way to become qualified is by practicing in the profession? Although it is unlikely that the OAC will receive the necessary state funding, eventually the equivalent of an attorney's Bar Examination for CPGs, which would guarantee a basic minimum level of knowledge and education, will have to be created and administered. If the CPG Board and the courts wish to create and maintain a higher level of professionalism amongst CPGs, the only other alternative to a centrally administered CPG 'mini bar exam' is a system of apprenticeship for new guardians under experienced 'master guardians.' The novice or apprentice would have to work under the tutelage of a master until they reached a certain level of proficiency and experience, say, that of a journeyman in many trades. Of course, then there would have to be some sort of examination to test the basic knowledge of the 'master guardians.' The currently system of certifying individuals after a two-day training to serve as guardians for vulnerable clients with no oversight other than the overworked probate court judges and commissioners is inadequate.</p>
<p>Compassion and empathy for the individuals served. I hear too often from care providers and medical professionals that our agency/staff is the only professional guardian they know who truly cares about the client.</p>
<p>common sense caring willingness to learn listen</p>
<p>Compassion, understanding of clients specific disabilities, thick skin (don't take clients rants and raves</p>

personally)
understand mental illness and the nature of progressive diseases to be able to plan future care for clients. The ability to quickly and effectively research through problem situations and new information in order to make more informed decisions for others. Good writing skills. To think clearly in the face of serious challenges.
Complex as each guardianship is different. Ability to seek out resources, make decisions that are sometimes difficult, deal with unhappy clients and calm their fears. The most unanticipated was all of the financial work in establishing their financial resources, dealing with creditors, legal issues surrounding banking issues, and all the paperwork!
This is my free flow thinking: Having the ability to act as an advocate, a mediator, and simultaneously protect self is imperative. As well as, the ability to remain focused during conflict and dysfunction. I don't think it is stressed enough in training
Strong inter-personal communication skills; Ability to think critically about the needs of persons suffering from incapacities; Ability to assess risk in balancing the need for personal autonomy against potential dangers; The ability to say 'no' in a way that does not provoke unnecessary hostility; At least a working knowledge of medical terminology; A thorough understanding of the guardianship statutes and at least passing acquaintance with the Power of Attorney and Probate statutes- I think it is a good idea to read through the whole of RCW Title 11 every year, but that's a lawyer's perspective; A genuine desire to help people who really need help.
The ability to remain neutral and advocate for the well being and best interests of wards in highly volatile, often litigious family situations.
Knowledge of geriatric/mental health/DD issues and resources, rights, and systems; Interpersonal skills- listening and effective communication, follow-up documentation; Research skills (for resources, family, benefits) Attention to detail/follow-up; personal property management.
be knowledgeable of DD clients and helps to be knowledgeable about nursing homes, assisted living facilities.
Knowledge of, and working relationships with, the social service agencies in your ward's residential area. This is especially true if one is guardian for special populations, for example: developmentally disabled; brain injured; mentally ill; geriatric - especially if frail and in long-term care. It is especially necessary for a guardian to be able to admit when they are over their head and ask other professionals for guidance.
I believe an area quite neglected is the consultation with both clients and guardians around 'end of life issues' beyond the paperwork. I believe all guardians should know and respect the needs of a person they serve in illness and death. I strongly believe that chaplains are an essential support to persons and guardians who carry a large caseload. End of life issues are extremely complex and deserve intense review and care, on behalf of both client and guardian. Psychological bonds, regardless of level of professionalism, happen. 'Guides' to help in intensely emotional situations are necessary. It is also helpful that I have certified professional guardian training (as a chaplain) to understand the burdens and issues of ALL involved. Grief work is an area CPGs lack training or guidance in, for selves and others.
Understanding of investments, basic financial management concepts. Ability to communicate well and work with professionals, understand medical evaluations and assessments. Experience working with seniors and people with disabilities. Competent writing skills good verbal communication skills basic knowledge of medical information and symptomatology regarding dementias, psychiatric conditions, development disabilities, head injuries, stroke, etc. Knowledge of community resources and residential placement alternatives, interviewing skills, understanding of family dynamics good comprehension of guardianship statute, role and duties of guardian of person and estate. I feel that a CPG should have a minimum of a B.A. and at least 5 years of social service/case management related experience, but a Masters degree requirement is preferable, considering the complexity of the job. I know there are people doing this work who have backgrounds in either finance/business or social work, but not both- which is why a curriculum specifically for CPGs should be developed.
Kind heart willing to help incapacitated persons.

It is not enough to be an attorney, social worker, or nurse. You need some understanding in all these areas to serve your clients well. I have known of attorney's that do poorly with dementia clients and I'm sure their are attorney's that could say the same of nurses or social workers.
Knowledge and understanding of people with developmental disabilities, mental illness, physical disabilities and interacting with family members.
A CPG must be able to read and interpret statues and rules pertaining to guardianship issues; A CPG should not be allowed to act as Trustee of a Special Needs Trust without adequate knowledge of trusts; CPGs should have a solid working knowledge of accounting and tax issues. CPGs should have a working knowledge of the court system. I believe CPGs should be tested before receiving appointments in the same manner that lawyers must pass a bar exam before being admitted to practice. There should be far more training before a person can be certified as a CPG, as well. (Two days is woefully inadequate.) A CPG should possess a high degree of integrity, an even temper, organizational skills, and the ability to work with persons from diverse backgrounds. The ability to work without sleep when needed doesn't hurt, either.
Care for the client and family and friends. Commitment that would extend beyond our responsibilities to ourselves and our own cares and concerns. The desire to deal with difficult situations without turning our back on people or making decisions based on emotion rather than rationality. Basic bookkeeping Medical terminology Basic knowledge of psychiatric and medical conditions
Knowledge of the health care system, Medicaid rules, ability to problem solve, apply common sense to situations, financial training for budget management
Patience, respect, sensitivity, good assessment skills, all those qualities that are hard to teach in a didactic setting.
Critical thinking and the ability to remain neutral and sometimes impartial for the sake of the client. Multi-tasking, prioritizing tasks and time managements. Some financial background and medical background. Legal processes related to serving as CPG.
More in depth training on Medicare and Medicaid for clients.
get to know the person you are serving and get as much about there disability as possible
respect kindness understanding ability to listen and communicate
Knowledge of social services and how to access Ability to deal with hostile family members and clients Ability to budget and manage money Meticulous documentation skills
Should be a people person with team approach when involved with DD population.
To have the ability to deal with the vulnerability of being in the position you are in when it comes to other people's lives and money.
community resources, personable, understanding of ethic of G
patience
More diversity needed. Most CPGs at trainings are white.
Experience with persons who know they have resources and will be very creative to get their access to those resources. Knowledge of how to deal with persons with drug or alcohol issues.
ASIDE FROM FINANCIAL AND MEDICAL KNOWLEDGE, THE ABILITY TO COMFORT AND BE THERE FOR THEM AS THEIR LIFE CHANGES. YOU NEED TO BRING A DEPTH OF CARING FOR THEM AS INDIVIDUALS.
Important to have good skills in communicating with the various agencies/facilities/families. Knowledge of agencies/facilities in the community.
Guardians need to know when they need help with a problem and seek counsel ie. financial or legal matters.

CPG's need to be able to mediate, the CPG needs to be well versed in community resources in multiple communities, they also need to be able to how to access those resources. The CPG needs to have skills in finessing a situation as well as what people are

knowledge in disease, condition, treatment. ability to be open minded Ability to be firm but professional in advocating. Patients and understanding ability to multi-task

Assessment skills, good communication skills, the ability to advocate for the people for whom you are guardian, even though it might make others mad.

A broad & general knowledge of healthcare delivery, insurance process, legal sensibility, coping skills to interact with disabled people with all cognitive deficits, financial skills, trust management, banking and investment sensibility, truthfulness

7.C. Additional feedback or information about your role as a CPG:
I take a personal interest in all my clients. While I have specially trained staff to help me provide a high quality of service, those providing personal care to my clients know that I'm accessible 24/7. I actively work with the staff at facilities to problem solve ways to make difficult situations work and, because of this, many facilities greatly appreciate my involvement.
This is not an easy vocation that is misunderstood by almost everyone outside the field. The importance of time management, responsiveness, financial management and accuracy is not appreciated by individuals not familiar with or newcomers to the field.
Being a CPG can be very rewarding, but at the same time can be very demanding. Need to have patience and good communication skill. Will be dealing with a variety of people and situations, always expect the unexpected, but be prepared for it.
Reporting abuse could be added to the list.
Prepare prosecution when embezzlement has occurred. Help the roundtable in Thurston co prepare for family training to family guardianships. Help train 'newbies' on an actual mentoring style model
It is very difficult to break out the number of hours spent in different areas of daily guardianship work. I am constantly multi-tasking and just sitting down figuring out what hours I spend where is next to impossible. In my area there are only two CPG's which makes it very difficult to turn down DSHS cases and DSHS does not pay enough for the work a guardian must perform for these little people that need so much attention.
The most important concept to grasp is the 'substitute decision maker' role.
Our agency has mostly Medicaid clientele and therefore it seems to be not useful and potentially detrimental to our agency to have Errors and Omissions insurance required.
The role of a case manager/professional guardian has been the most difficult, unique, and satisfying job I have done as a case manager. It is never boring, the clients have complex needs and the legal responsibility requires a total commitment to a person. It is the stuff of melodramas and requires a constant, unflappable guide through the mess to bring stability.
I love the work. I dislike the fear of liability. I hate the upcoming necessity for E&O insurance. I probably will have to step down from the good work that I do, because the insurance will cost more than I make in a year. If Guardians ad Litem have some immunity from liability as officers of the Court, why not CPGs? Train and screen CPGs thoroughly, then let us do our work.
New issues are always developing for which there are no clear-cut solutions. The job requires incredible mental flexibility, emotional stamina, critical thinking skills, ability to access resources and perseverance to get through extremely frustrating and trying situations that take a long time to resolve and involve legal and ethical dilemmas. This work can be an ethical minefield.
It is time consuming. The DSHS allowance of \$175.00 per month for a CPG is not worth the amount of work the CPG puts in. It's going to be more and more difficult to find CPG's willing to take these clients. Especially the SSI clients that are Pro Bono. In this field 'Free' can be 'Years', it's their lifetime! It's simply not worth it from a business perspective.
I have worked as a solo practitioner during my tenure as a guardian; this is most difficult and I would not recommend someone new take on solo practice. You will never be able to get all the reports required finished and filed in a timely manner, and there will not ever be enough hours in a day for you. A good support staff will make your life easier, and can be accomplished with a few course in office management, another necessity for new guardians.

<p>Our agency is set up to meet client needs and provide services on a team basis. Some tasks are performed by others within the team. This benefits clients by having multiple individuals considering their needs and is more efficient due to expertise in certain areas.</p>
<p>this is a very difficult profession. It seems as if you are often opposed by someone in almost every course of action you need to take on a clients behalf. It is important not to become paralyzed and ineffective out of fear of opposition. I overcome this by practicing as if a Judge is looking over my shoulder at every decision path and by practicing as if my decision will be posted on the front page of the newspaper tomorrow. If I feel good about it, then I know I am making the right decision. Not many jobs require this level of daily public ethics.</p>
<p>You have to be very dedicated and be able to multi-task.</p>
<p>Guardianship services are essential to a large number of Washington's citizens, and the perceived quality of those services is therefore very important. Despite initial certification requirements and continuing education there remains at least a perceived (and in my view a very real) inconsistency in quality from guardian to guardian and agency to agency. One possible answer could be some sort of mentoring program in which experienced guardians meet or talk with newer or less experienced guardians on a regular basis. It could also be important to have some kind of examination requirement covering appropriate knowledge, as hard as that may be to administer in a fair way.</p>
<p>My role is to be there for the client. I let them know that I do care about them and I will do my best to help them in any way.</p>
<p>Responses to 55-58 were derived from quickbooks 'sales by item summary' for 01/01/2003-12/31/2006. The total billable hours were converted to weekly averages and multiplied by service item percentages. There is no way I could have estimated a reasonably accurate weekly averages. This exercise was informative. May I suggest a standardized 'charge master list' would be helpful in making generalizations and comparisons among all CPG's.</p>
<p>the role of guardianship is not understood by most nursing home staff or doctors, etc.</p>
<p>I have been approached by several guardians at events about CPG training needing an optional spiritual (non denominational) component. People are very curious about what I do in relation to guardianship. Bridge Ministries is a fine model of how an agency can provide a supportive environment for a guardianship team as well as residence staff and of course, the person served. I believe we are undertraining guardians for the 'unseen' issues during IP illness or impending death. Bridge Ministries does not force spirituality or chaplaincy on any person, but it is often requested. It is not approached through a particular perspective (Christian, etc)but provides a service clearly needed.</p>
<p>Some of my answers about daily activities reflect the fact that my role is that of a manager and supervisor, so I have case managers who do many of the activities on the survey. I think without this understanding, the survey could yield unreliable information.</p>
<p>At times you are asked to be a friend or care provider.</p>
<p>I decided to become a CPG because I believed it to be a 'calling' and not just another way to make money. I have been quite disheartened by the actions and inactions of other guardians who seem to put profit above professionalism. The profession is going to have to make some tough decisions about training and licensing, or I fear the profession is in jeopardy.</p>
<p>I have left guardianships because of my own aging and the fact that after years of being responsible for people from the inception of the guardianship to termination of the guardianship or death of the client exhaustion has taken its toll. Also, the increasing regulations on guardianship that limit our ability to act in the best interest of clients - for example, being barred from hiring private caregivers often leads to placing clients in more restrictive environments than might be necessary. I believe that guardians need the support of the court and more often than not I have experienced that support but I also believe that there are instances where the board and the court need to hear more clearly what the guardians need in order to provide a high level of care for the client. Finally, I believe that the Spokane County Guardianship Monitoring program would be even more effective if monitors would visit clients as</p>

stringently and regularly as our financial records are audited. We are placing a high degree of oversight on the finances but not on the person.
I think the whole Guardian system in Washington State is skewed in some very unhealthy directions. Lots of emphasis on protecting money and scant attention paid to human services. Problems or potential problems are often found in need of 'solutions' that require greater overhead costs channeled into the legal arena. As a CPG with a social services background who is committed to creative, cost-effective service to my wards, I experience being marginalized and invalidated by the legal professionals who set state-wide standards. Luckily, the judicial officers in my county are more tolerant of alternative perspectives, which is why I am still around.
There are very few accurate resources available to the general public regarding the activities and responsibilities of a CPG. Most of my clients or the friends and families of clients are woefully misinformed about how CPGs are paid, some people assume CPGs and POAs are government employees, others seem to believe I enjoy donating time and can live on air. I enjoy my work and rarely stay with clients who are aggressively opposed to my serving as their representative. I have withdrawn as POA and Guardian on 3 cases in the past 2 years due to conflicts and litigious clients.
My role as a CPG also includes many aspects of Care Management as I take an active role in monitoring clients. I see my clients on a regular basis sometimes daily during a crisis and other times monthly.
individuals working in this fields must love assisting people, supporting people, and listening to their choices.
I am a CPG to aid me in my legal practice, which involves guardianships. I do not, however, serve as a guardian.
It is an important role and a fulfilling one just wish the income was better
I supervise 16 employees who do the actual work mentioned in this survey.
Currently inactive. One case pro bono and one case paid \$ 175/month. Will be taking on one more pro bono case and one more paid case soon. All my clients are Medicaid recipients.
WE ARE DEALING WITH PEOPLE WHO I BELIEVE WE MUST HONOR AND RESPECT THEIR RIGHTS AND WISHES IF AT ALL POSSIBLE. THEIR WELFARE IS IMPORTANT BUT SO IS THEIR DIGNITY.
Working as a guardian is both frightening and rewarding. It is not a 9 to 5 job and the individual CPG needs to be able to integrate all of the needs both their own as well as the needs of the guardianship client.
Although I'm not involved in providing much financial monitoring for the people served as guardian by this organization, other employees who are not guardians are.
Guardians are on call 24 hours per day, 7 days a week, 365 days a year. Guardians need to deal with emergency crisis' on weekends, evenings and holidays. Medical consent, end of life decisions occur without prior notice and guardians must respond

Appendix 1. Education, Licenses, Certifications, and Work Experience for Agency and Non-agency CPGs

Status	Education	Licenses and Certifications Relevant Work Experience (Type and Number of Years)			
Agency CPG	HS Diploma/GED	Bookkeeper (2 yrs)	Caregiver (2 yrs)	Fast Food mngr (2 yrs)	
Agency CPG	Some college	<i>Business</i> Program Manager (3 yrs)	<i>Nursing Assistance</i> Area Manager (2 yrs)	Financial Specialist (5 yrs)	
Agency CPG	Some college	<i>Certified Nurses Assistant (CNA)</i> Worked in nursing homes and at Lakeland Village as a CNA (6 yrs)			
Agency CPG	Some college	social services (8 yrs)	representative payee (8 yrs)		
Agency CPG	Some college	Personal Care Provider (17 yrs)	Personal Guardian (6 yrs)		
Agency CPG	Some college	Social Service (4 yrs)			
Agency CPG	Some college	<i>EMT - expired</i> guardian rep.(5 yrs)	ARC Case Manager (4 yrs)	DSP (2 yrs)	EMT (3 yrs)
Agency CPG	Some college	Financial (10 yrs)	Managerial (3 yrs)		
Agency CPG	Some college	Banking; staff-mgmt, (17 yrs)	Foster Parent (11 yrs)	Representative Payee (16 yrs)	
Agency CPG	Some college	Financial (5 yrs)			
Agency CPG	Associates	<i>Licensed Practical Nurse</i> Nursing (30 yrs)	<i>Certified CPR Trainer</i> Guardian for 1 person (10 yrs)	<i>Cert. in Early Childhood</i> Exec Dir of Non-profit (26 years)	
Agency CPG	Associates	Representative Payee (6 yrs)	Social Service (6 yrs)		
Agency CPG	Bachelors	<i>Foster Parent</i> Social work(25 yrs)	Representative Payee (4 yrs)	Care Coordinator (5 yrs)	
Agency CPG	Bachelors	Financial Assistant (6yrs)			
Agency CPG	Bachelors	<i>Notary Public</i> Paralegal (2 yrs)			
Agency CPG	Bachelors				
Agency CPG	Bachelors				

		Care Manager (10 yrs)	Counseling Group Facilitator (3 yrs)	Guardian for Family Member (1 yr)
Agency CPG	Bachelors	social service (16 yrs)		
Agency CPG	Bachelors	Registered Guardian-- NGF Health Care, manager, quality assurance reviewer and Administrator (5 yrs)	Oregon Certified Professional Fiduciary	Case manager (2 yrs)
Agency CPG	Bachelors	Registered Counselor Case Manager (25 yrs)		
Agency CPG	Bachelors	paralegal (30 yrs)	LPN (2yrs)	case manager (8 yrs)
Agency CPG	Bachelors	corporate acct-customer service (1yr)	case manager-client services coordinator for g'ship agency (10 yrs)	worked for guardian prior to CPG (8y)
Agency CPG	Bachelors	guardian case mngr (10 yrs)		
Agency CPG	Bachelors	legal secretary (10+ yrs)		
Agency CPG	Masters	Certification/ Pastoral Counselor (inactive due to career change) Direct/admin care of disabled (25 yrs)	Group home manager (2 years)	Counselor for disabled (22 years)
Agency CPG	Masters	Certified GAL Private Case manager for 5 years (DPOA)		
Agency CPG	Masters	DSHS (9 yrs)	King County Juvenile Diversion Program-contract position (1 yr)	
Agency CPG	Masters	Certified Public Accountant Social Service (5 yrs)	Health Care (5 yrs)	
Agency CPG	Masters	Financial (5 yrs)		
Agency CPG	Masters	K-9 CA Teaching Credential senior housing (2 yrs)	Adult Basic Ed CA Teaching Credential	
Agency CPG	Masters	Licensed Mental Health Counselor Forensic evaluator (15 yrs)	Licensed Real Estate Associate Broker	
Agency CPG	Masters	Registered Counselor Family Counseling (1 yr)	Notary Public Social Service (2.5 yrs)	Health Care (7 yrs)
Agency CPG	Masters	Washington State Teaching Certificate		
Agency CPG	Masters	paralegal (3 yrs)	resident counselor (1 yr)	
Agency CPG	Masters	Program Mgr. Social Services (5 yrs)	Soc Serv Super (5 yrs);Caseworker(12 yrs)	Juvenile Parole Officer (18 yrs)
Agency CPG	Prof degree	JD		

		Lawyer (5 yrs)		
Agency CPG	Prof degree	WA attorney attorney (23 yrs)		
Non-agency CPG	HS Diploma/GED	Notary Public Financial Institution (10 yrs)	For a prior Guardian (7 yrs)	Insurance Co. (2 yrs)
Non-agency CPG	HS Diploma/GED	Certified Senior Advisor care coordination (17 yrs)	home care supervisor (2 yrs)	
Non-agency CPG	HS Diploma/GED	Social Work (24 yrs)	Bookkeeper (18 yrs)	
Non-agency CPG	HS Diploma/GED	guardian ad litem paralegal (6 yrs)	legal guardian assistant (3 yrs)	
Non-agency CPG	HS Diploma/GED	NAC Service Alt (16 yrs)		
Non-agency CPG	HS Diploma/GED	domestic relations, real estate, guardianship, probate paralegal (22 yrs)		accounting (5 yrs)
Non-agency CPG	Some college	Law firm Administrator (18 yrs)		
Non-agency CPG	Some college			
Non-agency CPG	Some college		PLS (professional legal secretary)	
Non-agency CPG	Some college	Paralegal (7 yrs)		
Non-agency CPG	Some college	Guardianship and POA's since 1985		
Non-agency CPG	Some college	case\financial manager (17 yrs)	Payee Service Business (2 yrs)	
Non-agency CPG	Some college	Exec Secr, ITT Peterson Sch of Bus Child Care (6 yrs)	Notary Office Manager (2 yrs)	
Non-agency CPG	Some college	Legal Investigator Medical (18 yrs)	financial manager (10 yrs)	
Non-agency CPG	Some college	Licensed NHA Licensed NHA (18 yrs)	Medical Records (8 yrs)	
Non-agency CPG	Some college	Licensed Practical Nurse nursing (13 yrs)	nurse manager (5 yrs)	
Non-agency CPG	Some college	medical secretary nursing aid in hospital (2 yrs)	ward clerk in hospital (1 yr)	receptionist/doctor's assistant (5 yrs)
Non-agency CPG	Some college	certified nurse assistant	in-home care giver; Graduate LPN	social services nursing home
Non-agency CPG	Some college			

		volunteer guardian (12 yrs)	health care worker (17yrs)	vocational trainer (9yrs)
Non-agency CPG	Associates	E.M.T.(9 yrs)	N.A.C. (5 yrs)	activity assistant (9 yrs)
Non-agency CPG	Associates	paralegal (1 yr)	medical clerk(3 yrs)	bookkeeper (2 yrs)
Non-agency CPG	Associates	<i>Notary Public - Certified Signing Agent</i> Banking (2 yrs)	Legal Secretary (2 yrs)	
Non-agency CPG	Associates	<i>License Practical Nurse</i> Nurse (7 yrs)	<i>Biblical Studies Certificate</i> Guardian Ad/Litem (3 yrs)	Volunteer Guardian Ad/Litem (4 yrs)
Non-agency CPG	Associates	<i>Professional Geriatric Care Mgr</i> LPN (30 yrs)	LPN	
Non-agency CPG	Bachelors	accounting		
Non-agency CPG	Bachelors	<i>CERTIFIED MANAGERIAL ACCOUNTANT</i> CERTIFIED PUBLIC ACCOUTANT FINANCIAL (9 yrs)		
Non-agency CPG	Bachelors	Social Work (18yrs)		
Non-agency CPG	Bachelors	<i>Certified Mediator</i>	banking (5 yrs)	elder law (15 yrs)
		legal field/paralegal (15 yrs)		nursing home/NA (3 yrs)
Non-agency CPG	Bachelors	Soc Serv Dir of nh/rehab ctr (7 yrs)	Co-Director of homeless center (5 yrs)	Intensive tenant support staff (1 yr)
Non-agency CPG	Bachelors	guardianship case manager (5 yrs)		
Non-agency CPG	Bachelors	developmental disabilities 31yrs	nursing 7 yrs	
Non-agency CPG	Bachelors	Social Services (30 yrs)	Health Care & Behavioral health (5 yrs)	
Non-agency CPG	Bachelors	<i>GMHS</i> geriatric social services/case management (6 yrs)	<i>CPG</i>	<i>RC</i>
Non-agency CPG	Bachelors	<i>Life & Health Insurance</i> Financial (10 yrs)	<i>Series 6 & 63</i> Education (4 yrs)	<i>Long Term Care Certified</i>
Non-agency CPG	Bachelors	<i>Nursing Assistant, Registered</i> DD care provider (3 yrs)		
Non-agency CPG	Bachelors	<i>Nursing Home Adm.</i> NH Adm. (2 yrs);Lib Tech, Law Firm (3)	CCRC Business Office Mgr (5 yrs)	CCRC Accts Rec & Payable 8
Non-agency CPG	Bachelors	<i>WA State Bar Assoc</i>	<i>Securities License</i>	<i>Business License</i>

Non-agency CPG	Bachelors		Financial Mgr at guard. Agency (5 yrs)	independent guardian with 1 client (4 yrs)	
Non-agency CPG	Bachelors		WA State Notary Public Paralegal (2 yrs)	King County Registered Legal Assistant Administrative Assistant - CPA Firm (3 yrs)	
Non-agency CPG	Bachelors		Financial (7 yrs)	Pastoral (7yrs)	Investment Advisor (4 yrs)
Non-agency CPG	Bachelors		guardianship case mgr (5 yrs)	health care clerk (20 yrs)	
Non-agency CPG	Bachelors		social services (30 yrs)		
Non-agency CPG	Masters		Certified GAL Respiratory Therapist (10 yrs)	Former Respiratory Therapist Home care Intensive tenent support (1 yr)	Corrections officer (3 mo)
Non-agency CPG	Masters		Certified In Gerontology Mental Health Case Manager (12 yrs)	LMHC Licensed Mental Health Counselor (3 yrs)	Qualified Dementia Care Trainer Vocational Counselor (1 yr)
Non-agency CPG	Masters		Certified Rehabilitation Counselor Rehabilitation counseling (20 yrs)	Registered Counselor (WA) Case Mgmt (10 yrs); Voc Eval (15 yrs)	Registered Vocational Counselor Mental Health (30 yrs)
Non-agency CPG	Masters		Master Guardian-NGF Guardian/Conservator (12 yrs)	GAL (3 yrs); Foundation for Elderly (5 yrs)	Geriatric Assessment clinic 4 years
Non-agency CPG	Masters		financial management (11 yrs)	health care mgmt (20 yrs)	social services (1 yr)
Non-agency CPG	Masters		Master Guardian-Nat'l Gdn. Foundation Conservator-Calif. (10 yrs)	GAL-Hawaii (4 yrs)	Gerontologist-Hawaii (10 yrs)
Non-agency CPG	Masters		Licensed Mental Health Counselor MH Therapist/case mgr (15 yrs)	Geriatric Mental Health Specialist Guardianship case manager (3 yrs)	
Non-agency CPG	Masters		Licensed Mental Health Counselor Behav Hlth-mental & chem dep (11 yrs)	Emergency Mental Health-crisis response (6 yrs)	
Non-agency CPG	Masters		LMHC Mental Health professional (20 yrs)	casemanager (15 yrs)	social service program super (10 yrs)
Non-agency CPG	Masters		Nursing Assistant - Registered hospital chaplain (12 yrs)	Registered Counselor hospice caregiver (2 yrs)	GAL - Island County Superior court nursing assistant (3 yrs)
Non-agency CPG	Masters		NURSING HOME ADMINISTRATOR CASE MANAGER (15 Yrs)	CARE MANAGER CERTIFIED NHA (15 Yrs)	GERONTOLOGIST (30 Yrs)
Non-agency CPG	Masters		Private Investigator Accountant (25 yrs)	business owner (10 yrs)	
Non-agency CPG	Masters		registered counselor social services / LTC (8 yrs)	MR/DD professional (7 yrs)	SS/QMRP consultant (3 yrs)
Non-agency CPG	Masters		Registered Counselor	Geriatric Mental Health Specialist	

		Social worker in nursing homes (15 yrs)	vocational rehab counselor (2 yrs)	MH Therapist/case manager (13 yrs)
Non-agency CPG	Masters	<i>Registered Nurse</i> Case management services (4 yrs)	<i>Registered Counselor</i> Basic bookkeeping services (10 yrs)	Care giver (10 yrs)
Non-agency CPG	Masters	<i>RN</i> public health admin & consult (22 yrs)	public health clinic/field nursing (15yrs)	
Non-agency CPG	Masters	<i>SAP</i> teacher (25 yrs)	<i>CDC</i> Principal (15 yrs)	<i>GAL title 26</i> superintendent (5 yrs); soc serv (10)
Non-agency CPG	Masters	case management admin (17 yrs)	social service, aging network (6 yrs)	
Non-agency CPG	Masters	direct care - DD population (1 yr)	teaching-college foreign language (3 yrs)	clinical case management (2 yrs)
Non-agency CPG	Masters	counselor for teen girls (15 yrs)		
Non-agency CPG	Masters	<i>Licensed Speech Path., WA State</i> Speech Pathologist (25 yrs)		
Non-agency CPG	Prof degree	Guardian ad Litem Guardianship	Attorney for Guardianship	
Non-agency CPG	Prof degree	<i>Attorney License</i> attorney (2 yrs)		
Non-agency CPG	Prof degree	<i>Attorney</i> Attorney (35 yrs)		
Non-agency CPG	Prof degree	attorney (30 yrs)		
Non-agency CPG	Prof degree	<i>WSBA (attorney)</i> lawyer (4 yrs)		
Non-agency CPG	Prof degree	<i>member of WA and CT bars</i> Attorney (12 yrs)		
Non-agency CPG	Prof degree	<i>RN</i> Comptroller (4 yrs)	<i>Notary</i> Nurse (26 yrs)	<i>Attorney at Law</i> Attorney (16 yrs)
Non-agency CPG	Prof degree	<i>WA Bar (all state and federal courts)</i> legal practice representing elderly and disabled persons (22 yrs)	<i>CA Bar (all state and federal courts)</i>	
Non-agency CPG	Prof degree	<i>WSBA</i> elder law attorney (6 yrs)	paralegal (12 yrs)	
Non-agency CPG	Prof degree	<i>WSBA</i> Lawyer (2 yrs)	Director- Non-Profit Organization (6 yrs)	Social Work (15 yrs)
Non-agency CPG	Prof degree	<i>WSBA</i> lawyer (22 yrs); disab agency brd (8 yrs)	boards guardian agencies (10 yrs)	animal assisted therapy 7 yrs

Non-agency CPG	Prof degree	WSBA Lawyer (22 yrs)		
Non-agency CPG	Prof degree	WSBA Paralegal (9yrs)		
Non-agency CPG	Prof degree	WSBA Lawyer (20 yrs)		
Non-agency CPG	Prof degree			
Non-agency CPG	Doctorate degree	Certified Teacher Spec Ed Teacher (22 yrs)	Univ. Professor -SPED/HS (5 yrs)	Comm Serv Dir (2) Disab Plan/Adv (9)

Appendix 2. Areas of Study for CPGs with Degrees

Highest Degree	Advanced Area of Study	Bachelors Area of Study (if different than advanced area)
Bachelors degree		Accounting
Bachelors degree		Business
Bachelors degree		Business
Bachelors degree		Education
Bachelors degree		English
Bachelors degree		English
Bachelors degree		English
Bachelors degree		History
Bachelors degree		Music
Bachelors degree		Pre-law
Bachelors degree		Political Science
Bachelors degree		Psychology
Bachelors degree		Social Work/Social Services
Bachelors degree		Social Work/Social Services
Bachelors degree		Social Work/Social Services
Bachelors degree		Social Work/Social Services
Bachelors degree		Social Work/Social Services
Bachelors degree		Social Work/Social Services
Bachelors degree		Social Work/Social Services
Bachelors degree		Social Work/Social Services
Bachelors degree		Sociology
Bachelors degree		Science
Bachelors degree		Pastoral Ministries
Masters degree	Business	Art
Masters degree	Business	Communcations
Masters degree	Business	
Masters degree	Business	
Masters degree	Communications	Business
Masters degree	Engineering	
Masters degree	German	
Masters degree	Gerontology	Education
Masters degree	Gerontology	Education
Masters degree	Gerontology	English
Masters degree	Gerontology	Psychology
Masters degree	International Studies	
Masters degree	Legal Studies	History
Masters degree	Math	
Masters degree	Psychology/Counseling/Social Work	General Studies
Masters degree	Psychology/Counseling/Social Work	Health Education
Masters degree	Psychology/Counseling/Social Work	Political Science
Masters degree	Psychology/Counseling/Social Work	Public Administration

Masters degree	Psychology/Counseling/Social Work	Recreation Admin
Masters degree	Psychology/Counseling/Social Work	
Masters degree	Public Administration	
Masters degree	Public Administration (Health)	Nursing
Masters degree	Public Administration (Health)	Psychology
Masters degree	Special Education	
Masters degree	Theology	
Masters degree		History, Education
Professional degree	JD	Biology
Professional degree	JD	Asian Studies
Professional degree	JD	Business
Professional degree	JD	Communications
Professional degree	JD	General Studies
Professional degree	JD	General Studies
Professional degree	JD	History
Professional degree	JD	History & Political Science
Professional degree	JD	Interdisciplinary Studies (Law)
Professional degree	JD	Interdisciplinary Studies (Law)
Professional degree	JD	Nursing
Professional degree	JD	Political Science
Professional degree	JD	Political Science
Professional degree	JD	Political Science
Professional degree	JD	Sociology
Professional degree	JD	Theology/Ministry
Professional degree	JD	
Professional degree	JD	
Doctorate degree	Special Education	History, Political Science

