

National Guardianship Foundation Core Competencies Ranking

Rank the core competency categories (statements in **bold**) on a scale from 1 to 7 giving a “1” to the category that should receive the most emphasis on the Registered Guardian certification examination.

___ **Professional Practices: Knowledge and application of guardianship principles as they relate to the professional roles of the guardian** (includes but not limited to):

Within this group check the 2 topics you believe should have the greatest emphasis

- ___ Ethics/Standards
- ___ Guardianship alternatives
- ___ Confidentiality
- ___ Conflict of Interest
- ___ Quality assurance
- ___ Business practices
- ___ Fees

___ **Knowledge of Ward: Knowledge of the personal aspects of a ward’s life and ability to address those special situations or circumstances affecting a ward** (includes but not limited to):

Within this group check the 2 topics you believe should have the greatest emphasis

- ___ Diversity
- ___ Mental Illness/Disabilities
- ___ Difficult clients
- ___ Family dynamics
- ___ Social history, values and beliefs

___ **Application of Surrogate Decision-making: Knowledge of theory and application of decision making principles and limitations in making surrogate decisions** (includes but not limited to):

Within this group check the 2 topics you believe should have the greatest emphasis

- ___ Best Interests/substituted judgment
- ___ Informed consent
- ___ Least restrictive alternatives
- ___ Capacity

___ **Legal and Courts: Knowledge of laws, courts and legal processes governing guardianship and the guardian’s responsibility to modify, terminate or limit a guardianship** (includes but not limited to):

Within this group check the 2 topics you believe should have the greatest emphasis

- ___ Due process
- ___ Ward’s rights
- ___ Relationship with other officers of the court
- ___ Court supervision/sanctions
- ___ Modification/closing
- ___ Compliance with monitoring systems

___ **Personal Management: Knowledge and application of the responsibilities of the guardian of the person including planning, monitoring, reporting, residence and programs** (includes but not limited to):

Within this group check the 2 topics you believe should have the greatest emphasis

- ___ Plans and reports
- ___ Residential placement
- ___ Well-being oversight
- ___ Functional assessment
- ___ Abuse

___ **Financial Management: Knowledge and application of the responsibilities for financial management of a ward's estate and assets** (includes but not limited to):

Within this group check the 2 topics you believe should have the greatest emphasis

- ___ Inventory/marshal/account (reporting requirements)
- ___ Personal Property
- ___ Real Property
- ___ Fiduciary responsibilities
- ___ Benefits
- ___ Financial planning
- ___ Financial abuse/recovery

___ **Medical Decision-making: Knowledge and application of the principles and responsibilities surrounding surrogate medical decisions, including the ability to identify issues that have legal and ethical consequences for both the guardian and the ward** (includes but not limited to):

Within this group check the 2 topics you believe should have the greatest emphasis

- ___ End of life care
- ___ Special medical decisions/conditions
- ___ Medical advocacy
- ___ DNR/withhold/withdraw

National Core Competency Survey Jan. Feb. 2008

Professional Practices	Knowledge of Conservatee	Application of Surrogate Decision Making	Legal and courts	Personal management	Financial management	Medical decision making
1. 86	1. 66	1. 12	1. 35	1. 22	1. 7	1. 22
2. 32	2. 55	2. 40	2. 28	2. 29	2. 29	2. 34
3. 23	3. 30	3. 49	3. 36	3. 33	3. 32	3. 36
4. 18	4. 26	4. 35	4. 50	4. 32	4. 34	4. 37
5. 20	5. 25	5. 29	5. 23	5. 55	5. 35	5. 43
6. 24	6. 14	6. 35	6. 23	6. 37	6. 53	6. 37
7. 27	7. 18	7. 32	7. 39	7. 25	7. 45	7. 35
Math Total						
1116	1167	898	947	885	775	924
Total 6712						
Math Goal # on exam						
16	17	13	14	13	11	13
Total 97 Adjust +3						
Math Goal # in pool						
48	51	36	42	36	33	36
Total 282 (adjust +18) Have in Pool						
38	9	54	71	21	50	17

1. Professional Practices: Knowledge and application of guardianship principles as they relate to the professional roles of the guardian.

1.1 Code of Ethics/standard of practice	1.2 Conflict of interest	1.3 confidentiality	1.4 Quality assurance	1.5 Business practice	1.6 fees
Want on exam (need x3)					
8	3	3	2	2	1
Total = 19					
Have in Pool					
17	Split 10 with confidentiality	Split 10 with conflict	6	Split 8 with fees	Split 8 with business practice
					Reassign 4 from 1.2, reassign 6 from 1.6

2. Knowledge of ward: Knowledge of the personal aspects of a ward's life and ability to address those special situations or circumstances affecting a ward.

2.1 diversity	2.2 Family dynamics	2.3 Social history, values belief	2.4 Abuse neglect exploitation	2.5 Difficult clients	2.6 Special pop
Votes					
33	153	550	346	132	235
Total = 1149					
Want on exam (need x3)					
1	2	6	4	1	3
Total = 17					
Have in Pool					
Split 2 with difficult clients	3	1	0	Split 2 with diversity	2
					Reassign 1 from 2.5

3. Application of Surrogate Decision-making: Knowledge of theory and application of decision making principles and limitations in making surrogate decisions.

3.1 Decisional Standards (SJ/BI)	3.2 Informed consent	3.3 Capacity	3.4 Alternatives	3.5 LRA	3.6 Wards rights
Votes					
456	179	201	87	220	350
Total = 1493					
Want on exam (need x3)					
4	1	2	1	2	3
Total= 13					
Have in Pool					
17	Split 9 with LRA	8	Split 8 with advance directives	Split 9 with informed consent	3

4. Legal and courts: Knowledge of laws, courts and legal processes governing guardianship and the guardian's responsibility to modify terminate or limit a guardianship.

4.1 Procedures, laws, practices	4.2 Types of guardianships, limited	4.3 Monitoring and supervision	4.4 Modification, closing	4.5 Guardian authority	4.6 Due process	4.7 bonding
Votes						
555	142	413	30	413	510	9
Want on exam (need x3)						
4	1	3	0	3	4	0
Total = 15						
Have in Pool						
18	10	6	15	19	Reassign 3	Reassign 3, if any

5. Personal Management: Knowledge and application of the responsibilities of the guardian of the person including planning, monitoring, reporting, residence and programs.

5.1 Plan	5.2 Residential placement	5.3 Well-being oversight	5.4 Functional assessment	5.5 Death of ward	5.6 Support resources
Votes					
272	232	334	227	20	410
Want on exam (need x3)					
2	2	3	2	0	4
Total = 13					
Have in Pool					
1	10	3	4	Reassigned, if any	1 reassign

6. Financial Management: Knowledge and application of the responsibilities for financial management of a ward's estate and assets.

6.1 Inventory/marshal of estate	6.2 Personal property mgt.	6.3 Real property mgt.	6.4 Public benefit	6.5 Investing and protecting assets
Votes				
437	31	39	384	265
Want on exam (need x3)				
4	1	1	3	2
Have in Pool				
Split 21 with reporting	7	9	3	Check 10

6.6 Exploitation recovery	6.7 Power of attorney	6.8 Accountings/ reporting			
Votes					
74	29	252			
Want on exam (need x3)					
1	0	2			
Total = 14					
Have in Pool					
0	0 or reassigned	Some from 6.1			

7. Medical decision-making: Knowledge and application of the principles and responsibilities surrounding surrogate medical decisions, including the ability to identify issues that have legal and ethical consequences for both the conservator and the conservatee.

7.1 Making medical decisions	7.2 End of life care	7.3 Special medical decisions	7.4 Medical advocacy	7.5 DNR/ withhold/ withdraw	7.6 Durable power of attorney for health care
Votes					
583	206	437	210	211	72
TOTAL 1719					
WANT on exam (need x3)					
4	2	3	2	2	1
Total 11					
Have in Pool					
6	4	1	1	5	0

CGC Evaluation of NCG Examination

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7. How long did it take you to complete the exam? _____

8. Did you feel you had sufficient time to complete the exam?

- Yes No

9. Please list the number of any questions that you thought were particularly confusing.

10. Please list the number of any questions that you thought had no correct answer given.

11. Please list the number of any other questions that you think should be revised or written more clearly.

12. Please list the number of any question where you noted a typographical error, punctuation mistake, etc.

13. Did you feel you were sufficiently prepared to take the exam?

- Yes No

14. How did you prepare?

15. Any other comments about the examination that you want to share:

CGC Evaluation of NCG Examination

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Review Materials

16. Did you find the National Guardianship Association Study Guide helpful?

- Yes No

How could it be improved?

18. What topic areas should have more emphasis in the review materials?

Information about your practice

I am a:

- Sole practitioner
 Member of a partnership of ___ partners
 Principal in a non-profit corporation
 Other: (please explain) _____

I have been handling fiduciary matters for _____ years.

My current caseload is:

- 1-10
 11-30
 31-70
 71-149
 150+

Percentage of my cases in which I serve as:

- Conservator of person
 Conservator of estate
 Trustee
 Agent under a financial power of attorney
 Agent under a durable power of attorney for health care

THANK YOU FOR PARTICIPATING IN THIS BETA TEST!



**NCG CORE COMPETENCIES
Percentages on Exams
January 2010**



What is a Core Competency?

CGC relies upon a written survey to identify topic areas, or competencies, that should be covered in the certification examination. The purpose of the survey is to describe the "job" of a guardian in sufficient detail to ensure that the examination content is job-related.

Guardians who work in the specific state or on a national level complete the surveys. They are asked to rank the topics that are grouped into seven "core competencies" and several sub-topics. Exam questions are coded to the appropriate competency sub-topic and assigned to the exams according to the priorities the survey participants determined. The examination is designed to allow applicants to demonstrate the different skill sets and knowledge guardians must be able to apply to adequately carry out their responsibilities.

1. PROFESSIONAL PRACTICES – 18%

Knowledge and application of guardianship principles as they relate to the professional roles of the guardian (includes but not limited to):

- | | |
|---|------------------------------|
| 1.1 Ethics/Standards/Professional Conduct | 1.4 Quality Assurance |
| 1.2 Conflict of Interest | 1.5 Business Practices /fees |
| 1.3 Confidentiality | |

2. KNOWLEDGE OF WARD – 16%

Knowledge of the personal aspects of a ward's life and ability to address those special situations or circumstances affecting a ward (includes but not limited to):

- | | |
|--|---|
| 2.2 Family Dynamics / diversity | 2.5 Difficult Clients |
| 2.3 Social History, Values and Beliefs | 2.6 Special Populations
(DD/Aging/MI/Others) |
| 2.4 Abuse, Neglect, Exploitation | |

3. APPLICATION OF SURROGATE DECISION-MAKING – 13%

Knowledge of theory and application of decision making principles and limitations in making surrogate decisions (includes but not limited to):

- | | |
|--|------------------------------------|
| 3.1 Decisional Standards Alternatives
(Substituted Judgment/Best Interests) | 3.4 Guardianship Alternatives |
| 3.2 Informed Consent | 3.5 Least Restrictive Alternatives |
| 3.3 Capacity | 3.6 Wards' Rights |



NCG CORE COMPETENCIES
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- 4. KNOWLEDGE OF LAWS, COURTS AND LEGAL PROCESSES - 14%**
Knowledge of laws, courts and legal processes governing guardianship and the guardian's responsibility to modify, terminate or limit a guardianship (includes but not limited to):
- 4.1 Guardianship Procedures (Laws and Practices)
 - 4.2 Types of Guardianship (Including Limited Guardianship)
 - 4.3 Compliance with Court Monitoring and Supervision
 - 4.5 Guardian Authority
 - 4.6 Due Process
- 5. PERSONAL MANAGEMENT – 13%**
Knowledge and application of the responsibilities of the guardian of the person including planning for and overseeing supports and services (includes but not limited to):
- 5.1 Guardianship Plan
 - 5.2 Residential Options/Least Restrictive Alternatives
 - 5.3 Well-being Oversight and Monitoring
 - 5.4 Functional Assessment
 - 5.6 Knowledge of Resources, Supports and Services
- 6. FINANCIAL MANAGEMENT – 14%**
Knowledge and application of the responsibilities for financial management of a ward's estate and assets (includes but not limited to):
- 6.1 Inventory/Marshal Resources/Estate Plan
 - 6.2 Personal & Real Property Management
 - 6.4 Public Benefits (SSA, VA, Railroad, Medicare, etc.)
 - 6.5 Investing and Protecting Assets
 - 6.8 Accountings (Reporting Requirements)
- 7. MEDICAL DECISION-MAKING – 12%**
Knowledge and application of the principles and responsibilities surrounding surrogate medical decisions, including the ability to identify issues that have legal and ethical consequences for both the guardian and the ward (includes but not limited to):
- 7.1 Making Medical Treatment Decisions
 - 7.2 End-of-Life Care
 - 7.3 Special Medical Decisions/Conditions
 - 7.4 Medical Advocacy
 - 7.5 DNR/Withhold/Withdraw
 - 7.6 Power of Attorney for Health Care