

Guardianship Program Best Practices

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TYPES OF GUARDIANSHIP PROGRAMS

*Non-Profit
Guardianship
Programs*

*For-Profit
Guardianship
Programs*

*County
Guardianship
Programs*

OBJECTIVES:

- Define the Pillars of Excellence and describe what a Successful Guardianship Program looks like
- Define and discuss challenges of substituted judgement and decision making
- Explore tips to align your employees to the core values of your Program



PILLARS OF EXCELLENCE

Client Safety & Protection

Decision Making Protocol

Program Administration

Maximize Quality of Life

Human Resources Strategy

Business Development



CLIENT SAFETY & PROTECTION

CLIENT SAFETY & PROTECTION

- Court Order defining your authority and responsibilities
- Monthly face to face visits
- Safe residence / appropriate level of care & supervision
- Proper care and nutrition
- Safe daily activities – work / day hab
- Safe transportation
- Safe & positive interactions with family & friends – Family Handout
- Remain accessible – on call 24/7 for client emergencies / appropriate case manager : client ratio
- Relationship building – client, family, providers, fellow TGA members!

CLIENT SAFETY & PROTECTION CHALLENGES

What are some challenges your Program faces with ensuring your clients safety?

What has worked well for you (best practices) that has allowed your Program to be successful navigating client safety and protection?

Is there anything you would like to discuss or examples you can share?



THE DECISION MAKING PROCESS: SUBSTITUTED JUDGEMENT VS. BEST INTEREST

“Guardianship is the easiest thing in the world to have an opinion about, but the hardest thing in the world to do.”

THE DECISION MAKING PROCESS: SUBSTITUTED JUDGEMENT

- Definition – what someone would have chosen for themselves when they had the capacity to make the decision
- Check your Personal Biases
- Lean In - Take the time to listen to all parties (even the difficult folks)
- Consider all alternatives in light of resources. Be open to ideas.
- Focus on The Next Best Thing, not necessarily the 'right' thing

THE DECISION MAKING PROCESS: BEST INTEREST

- If wishes are unknown, Guardian must make a decision in the best interest of the individual (quality of life)
- Guardians talk to the individual, family members and friends, review personal documents, inquire about the individual's decision making for others, etc. alongside medical information and direction of medical professionals
- Has the individual or family made similar decisions for other family members?

DECISION MAKING CHALLENGES

What are some challenges your Program faces with Substituted Judgement and Decision Making?

What has worked well for you (best practices) that has allowed your Program to be successful with complex decision making?

Is there anything you would like to discuss or examples you can share?



PROGRAM ADMINISTRATION

PROGRAM ADMINISTRATION: COMPLIANCE

- Bond, Oath, Letters of Guardianship
- Annual Report of the Person
- Annual Accounting
- JBCC online profile
- Certification of Guardians
- Annual Care Planning
- Quality Assurance Procedures
- Internal controls
- Grant reporting
- Local Court Requirements
- Conflicts of interest
- Internal organization compliance requirements

PROGRAM ADMINISTRATION: OPERATIONS

- Physical office space
- Desks, chairs, conference meeting rooms
- Computers, scanners, printers, phones, fax
- IT support & infrastructure
- Branded materials & office supplies
- Dress code
- Accounting and Payroll
- Insurance
- Work from Home
- Team Meetings & One-on-One Staffings
- Mileage reimbursement
- Diversity & Equality Initiatives
- Team Building Activities
- Praise / Appreciation
- "Other Duties As Assigned"

PROGRAM ADMINISTRATION CHALLENGES

Solid administrative practices are a foundation for excellence in the other pillars of your program. Poor practices will undermine reputation and trust.

What pain point(s) is your program facing?

How does contract compliance impact your delivery of services?



MAXIMIZE QUALITY OF LIFE

NOTE:
*PROGRAM ADMINISTRATION
COMES BEFORE
MAXIMIZE QUALITY OF LIFE*

SECURE YOUR OXYGEN MASK FIRST

MAXIMIZE QUALITY OF LIFE

- Does the client's wishes harm themselves or others?
- Does the client have the resources to do the desired activity? Are their community resources that can help?
- How do we make this a meaningful yet safe and positive experience?
- What alternatives or modifications can be made?
- Is everyone on board? Does anyone disagree? What efforts have been made to research, communicate, and document the decision?

MAXIMIZE
QUALITY OF LIFE
CHALLENGES

If risk is the spice of life – how do you balance safety and quality of life in a guardianship?

What are some successes your Program has experienced with balancing quality of life?

How do you tell your client “no” and maintain a working relationship?

BREAK



HUMAN RESOURCES STRATEGY

HUMAN RESOURCES STRATEGY

- A **system** of HR practices aimed at the best employee performance possible to meet the organization's ultimate goals.
 - Define your organizations core values
 - Align your organization to your goals
- This will look different for every organization

HUMAN RESOURCES STRATEGY: COMPONENTS

- Recruitment
- Selection
- Training / On-Boarding
- Supervision
- Development
- Clearly Defined Job Roles
- Performance management
- Retention
- Pay and rewards
- On-going support from management
- Information sharing with staff
- Conflict resolution process
- Communication and feedback
- Employee policy manual and written expectations
- All HR components in alignment with core values and mission

HUMAN RESOURCE CHALLENGES

HR is critical and every organization how it's unique challenges.

What pain point(s) is your program facing?

How do you maintain consistent delivery of services amongst different employees?

How do you ensure an equitable distribution of cases amongst your team?



BUSINESS DEVELOPMENT

BUSINESS DEVELOPMENT

- Processes to develop and implement growth opportunities for the organization and leverage nurtured relationships.
- Business Development is used to attract not only new customers, or external funding sources, but also to attract and retain talented people to the organization.

BUSINESS DEVELOPMENT

- Clear Branding
- Engage your audience by highlighting your Impact
- Network to make contacts and build your bank of Resources: Information is Power!
- Every County Court is different: Build and maintain relevant relationships for maximum effectiveness
- Where to Start?
- Relationship Building:
 - ✓ Referral sources
 - ✓ Funding sources - grants
 - ✓ Judge and Court Staff
 - ✓ Clerks
 - ✓ Peers
- Compile and collect data to inform the process

BUSINESS DEVELOPMENT

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BUSINESS
DEVELOPMENT
CHALLENGES

Tenured, fulfilled and trained employees deliver the most consistent and excellent services to your clients.

What pain point(s) is your program facing?

What are you doing to combat burnout and to increase retention within your program?

Q&A:
PILLARS OF EXCELLENCE

CHALLENGING CASES & RESOURCE SHARING

*Do you have a specific case or
issue your Program needs
assistance in brainstorming
resources?*

*Do you have successful
resources to share with other
Programs?*

*What ideas work for your Team
that we have not covered today?*

THANK YOU FOR YOUR TIME!
WE WELCOME YOUR QUESTIONS, COMMENTS, AND FEEDBACK

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