



# Missouri Public Guardianship Report

*In 2019, the Missouri Association of Public Administrators commissioned a study of its public guardianship system. Consultants conducted interviews of public guardian and key stakeholder, creating a comprehensive report on the current status of Missouri's public guardianship system, including opportunities for improvements. We will show YOU what was learned and how to use these lessons in your own program.*

# Missouri Public Guardianship Report

## Objectives:

Participants will have an understanding of public guardianships in Missouri.

Participants will be able to see the key takeaways of the report.

Participants will have an understanding of the most significant opportunities for change in public guardianships.



# History of Missouri Public Guardianship

In recent decades there has been a significant burden placed on Missouri's public guardianship system, with little in the form of systematic or funding supports developed to meet the growing dependence.

A system that was designed to manage decedent estates and eventually evolving to support widows and orphans, now serves over 11,000 wards.

As with the rest of the nation, Missouri's system is serving individuals who are younger and with more complex needs than twenty-five years ago.

Overall, Public Administrators (Pas) are significantly under resourced while navigating complex systems to provide care for their wards – while facing increased pressure from the state and stakeholders to ensure all wards are placed in their least restrictive alternatives.

Recognizing that the state has reached a critical point in its capacity to serve individuals within Missouri’s public guardianship system, the Missouri Association of Public Administrators (MAPA) employed this report to help encourage a statewide response.

In 2019 MAPA members took a unanimous vote to convene PAs, researchers, and allied guardian professional to evaluate and report on the status of Public Guardianship and then to provide recommended actions for MAPA to improve it.



# Approach

MAPA engaged a third-party research firm to conduct a comprehensive, multi-mode analysis using:

- Qualitative in-depth interviews of public guardians and key stakeholders
- Quantitative survey of Public Administrators
- Secondary Research



# Qualitative in-depth interviews of public guardians and key stakeholders

60 minute in-depth telephone interviews were conducted with 5 public guardians – both elected and appointed,; part-time and full-time; representing a first, second and third class counties; and varying significantly in their backgrounds, caseload sizes and length of time in office.

And ten stakeholder interviews included respondents who interface and/or collaborate with the public guardian system.



# Stakeholders -

Those interviewed included leaders and representatives in mental and behavioral health services, leaders in developmental disability support, county commissioners, attorneys in elder law and private guardianship, judicial personnel, health placement specialist, academic leaders in guardianship, and advocacy organizations that work within the guardianship system.



# Quantitative survey of Public Administrators

- An online quantitative survey, developed with assistance from Missouri guardianship experts, was administered to all 115 Public Administrators across Missouri. (107 responded – 93% response rate) and 92 completed the entire survey (86% completion rate)





# Secondary Research

Researchers reviewed available publications on guardianship trends on the state and national level. This included review of literature related to history of Missouri's guardianship system, other state guardianship studies, and peer-reviewed journal from experts in public guardianship.



# Key Takeaways: Public Administrators

- Public Administrators are highly dedicated and committed to their positions.
- Individuals who serve as Public Administrators are generally service-driven by nature
- Public Administrators vary significantly in their experience and expertise



# Key Takeaways: Public Administrators (Partisanship, elections/appointments)

- Most Public Administrators believe that the position should be non partisan.
- There are mixed perceptions on the Office of Public Administrator being an elected position.



# Key Takeaways: Public Administrators (roles & responsibilities)

- Empathy, legal/financial literacy, and knowledge of mental and behavioral health are perceived as the top qualities to be successful as a Public Administrator.
- Other important skills for a successful Public Administrator include advocacy and communication.
- There exists a lack of awareness about the role of a Public Administrator.
- Public perception is influenced by the media, and first interactions with Public Administrators which can be disproportionately negative.



# Key Takeaways: Public Administrators (roles & responsibilities)

- The logistical solutions utilized by Public Administrators to accomplish their charge – sometimes rooted in proximity and efficiency – may not always align with a broader stakeholder or community desire.
- Top three barriers and challenges identified by Public Administrators include placement coordination, crisis management, and travel.



# Key Takeaways: Missouri Guardianship System (infrastructure and resources)

- Missouri's public guardianship infrastructure is fragmented and under resourced.
- Missouri's county-by-county approach to public guardianship results in inadequate distribution of resources.
- Public Administrator offices are generally understaffed when compared to national recommended standards.



# Key Takeaways: Missouri Guardianship System (infrastructure and resources)

- Lack of appropriate placements is the leading frustration among ALL those who interact with Missouri's public guardianship system, not just PAs.
- Specific placement challenges arise for wards with a propensity to violence.
- Wards with behavioral health issues are cited by interview respondents as utilizing a disproportionate amount of human and financial resources.



# Key Takeaways: Missouri Guardianship System (infrastructure and resources)

- The public guardianship system is heavily relied upon by the state, who is facing increased pressure to release individuals into the community.
- Public Administrators and stakeholders believe that the State should be providing funding for the office.





# Key Takeaways: Application of Guardianship Law

- Most Public Administrators feel their judges are a supportive resource
- Guardianship law is not always interpreted or implemented consistently across jurisdictions
- Alternatives to full guardianship, including limited guardianships and substitute decision-making, may be underutilized
- Some agree that there are missed opportunities for restoration of rights



# Key Takeaways: Caseloads & Individuals Being Served

- There has been an increased number of cases in Missouri's public guardianship system, and it is expected to grow in the coming years.
- Missouri's public guardianship system is serving younger individuals with more complex needs than ever before



# Key Takeaways: Caseloads & Individuals Being Served

- There is no consistent method for counting and weighing caseloads: Currently, Missouri lacks a consistent method of counting wards or cases (guardian vs. conservator), as well as a method of weighing cases by the count of time and resources they require.



# Recommendations:

- Systematic Collaboration
- Training/CE/PD
- Simplifying & streamlining
- Funding



# Recommendations: Systematic Collaboration

- Increase advocacy efforts with key stakeholders.
- Serve as a convener and coordinator of statewide partnerships.
- Improve data collection and management



# Recommendations: Systematic Collaboration

- Oversight and community-based support and monitoring for wards with a history of violent behavior.
- Increased collaboration and communication between Public Administrators and providers.
- Explore possibilities for State oversight and coordination.



# Action Steps: Systematic Collaboration\*

- Dispatched Public Administrators to Participate with Existing Groups
  - Department of Mental Health
    - Liaison
    - Quality Assurance Council
    - State Advisory Council
  - Mo-Wings
  - Crisis Intervention Team Councils
  - NAMI



# Action Steps: Systematic Collaboration\*

- Continued lobbying efforts and expand presence at Capitol
  - Continue to Propose Legislation that aids public guardianship
    - 2018 SB 806 (significant revisions to entire guardianship code);
    - 2019 SB 230 (revised guardianship venue statute); and,
    - 2021 SB 53 (revised duties of guardian to emphasize the decision-making function)
    - 2022 HB 1606 (revised the letters awarded to separate guardianship and conservatorship letters to count as TWO separate duties)
  - Allows forum to educate law makers
- Present Study to Community Groups





# Action Steps: Systematic Collaboration\*

- Form Statewide Coalition to Discuss Guardianship Study and Advise and Advocate for its Implementation
  - Invitations out to
    - Behavioral Health Agencies
    - DMH
    - Hospitals
    - CIT, etc.



# Recommendations: Training/CE/PD

- New Public Administrator training and onboarding process should be more comprehensive and guaranteed for all Public Administrators.
- Public Administrator workshops/training modules.
- Continuing education on ward placement, community support, and eligibility requirements.
- Access to legal, financial, social/community support services, and medical consultation



# Action Steps: Training\*

- Revised new Public Administrator training
  - Increased focus on accountability
  - Wellness and self-care
- Mentorship Program
- Monthly Virtual Lunch and Learn Programs
- Standards of Practice – Adopted April 2018, Ethical Principles 2019
- Practice Manual (procedures and forms) Adopted 2021



# Recommendations: Simplifying & streamlining

- Greater and more timely access to information on wards – SSN, DOB, Medicaid number, past arrest records, medical/psych records, etc.
- Creation of standardized forms and reporting instruments
- Guidance on implementation of state statute related to guardianship



# Action Steps: Simplifying and Streamlining \*

- Standard of Practice – Practice Forms
- Automated some forms with vendor
- Acuity Assessment – being developed in committee
- Decision Tree – being developed in committee
- Gather data on case loads
- Assessing definition of “staff” to advocate staff:client ratios



# Recommendations: Funding

- Track cost savings to the state
- Advocate for state funding



# Recommendations: Funding

- Explore opportunities for Federal funding: Medicaid, social service block grants, etc.
- Pursue private funding opportunities



# Recommendations: Funding

- Create a uniform process for gauging, quantifying and communicating acuity of wards – tie funding and staffing to caseload composition
  - Develop a recommended staffing ratio and codify it in state statute.
  - Develop a system for quantifying the acuity of wards and method for communication these findings to decision-makers.
  - Remove "letters" in statute as it relates to salaries for Public Administrators.





# Recommendations: Funding

- Alleviate the burden on the public guardianship system by promoting alternatives and restoring the rights of individuals – Education on alternatives, education/resources for families, supported-decision making, use of emergency guardianships



# Guardianship Report: Next Steps

- Attempt to secure endorsements from key stakeholders
- Begin using this as a tool for advocacy: Commissioners, judges, legislature, etc.
- Begin exploring and responding to recommendations



# Questions?



# Acknowledgements

- The Researcher – Simply Strategy –Insights Articulated.
- The Funder – Missouri Association of Public Administrators (MAPA)  
Founded in 1981 is an organization devoted to the education of county public administrators and the improvement of care standards for their wards. MAPA serves as an advocacy group for the mental ill, intellectually disabled, those with brain injuries and elderly individuals with dementia.



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