



CALIFORNIA 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 – 16.6%

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

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|---|--------------------------|
| 1.1 Ethics/Standards/Professional Conduct | 1.5 Conflict of Interest |
| 1.2 Alternatives to Court Fiduciaries | 1.6 Business Management |
| 1.3 Working with Co-Fiduciaries | 1.7 Fees |
| 1.4 Confidentiality | |

2. KNOWLEDGE OF CONSERVATEE - 12.6%

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

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|---------------------------------|--|
| 2.1 Cultural Diversity | 2.4 Difficult Clients |
| 2.2 Mental Illness/disabilities | 2.5 Family Dynamics |
| 2.3 LPS conservatorship | 2.6 Social History, Values and Beliefs |

3. APPLICATION OF SURROGATE DECISION-MAKING – 10.6%

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

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|------------------------------------|-----------------------------------|
| 3.1 Functional Assessment | 3.4 Capacity |
| 3.2 Informed Consent | 3.5 Limits to Fiduciary Authority |
| 3.3 Least Restrictive Alternatives | 3.6 Fiduciary Responsibility |



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- 4. KNOWLEDGE OF LAWS, COURTS AND LEGAL PROCESSES – 14%**
Knowledge of laws, courts and legal processes governing conservatorship and the conservator’s responsibility to modify, terminate or limit a guardianship (includes but not limited to):
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|---|---|
| 4.1 Due Process | 4.5 Modification of Conservatorships and Trusts |
| 4.2 Conservatee Rights | 4.6 Compliance/monitoring |
| 4.3 Relationships with Other Court Officers | 4.7 Financial Powers of Attorney |
| 4.4 Supervision/sanctions | 4.8 Mediation |
- 5. PERSONAL MANAGEMENT – 9%**
Knowledge and application of the responsibilities of the conservator of the person including planning for and overseeing supports and services (includes but not limited to):
- | | |
|---------------------------|--------------------------------|
| 5.1 Needs Assessment | 5.5 Abuse/neglect/exploitation |
| 5.2 Care Plans/reports | 5.6 Death of the Conservatee |
| 5.3 Residential Placement | 5.7 Resources |
| 5.4 Well-being Monitoring | |
- 6. FINANCIAL MANAGEMENT – 30%**
Knowledge and application of the responsibilities for financial management of a conservatee’s or beneficiary’s estate and assets (includes but not limited to):
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|---|--|
| 6.1 Inventory/Marshal Resources | 6.7 Medicare |
| 6.2 Personal Property Management | 6.9 Financial Planning/Medi-Cal Planning |
| 6.3 Real Property Management | 6.11 Trusts Management |
| 6.4 Real Estate Sales/Escrow | 6.12 Prudent Investor Rule |
| 6.5 Asset Safekeeping and Protection | 6.13 Consulting with Other Professionals |
| 6.6 Public Benefits (SSA, VA, Railroad, Medicare, etc.) | |
- 7. MEDICAL DECISION-MAKING – 7%**
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 fiduciary and the conservatee (includes but not limited to):
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|--|---------------------------------------|
| 7.1 End-of-Life Care | 7.4 DNR/Withhold/Withdraw |
| 7.2 Special Medical Decisions/Conditions | 7.5 Power of Attorney for Health Care |
| 7.3 Medical Advocacy | |