

Engagement exercise 07 – 23 June 2017; Combined Inventory & Management Plan Form - Guardianship

We targeted

- ✓ 120 recently appointed lay financial guardians due to send us their inventory of estate and management plan form between 12/01/17 to 16/02/17
- ✓ Financial guardians sent a new combined form which was piloted
- ✓ 25% returned the questionnaire in 2 week timescale
- ✓ Returns: 18 paper and 12 electronic = 30 replies

We asked you about the form. You said...

- 20 said they were aware that their powers would be limited until the form was approved
- 27 said we made it clear when to return the form to us
- 27 said we made it clear that supporting evidence was to be returned to us with the form
- 20 found the form easy to complete
- 26 said it was clear what information to detail
- 25 said there was enough space to provide all the detail
- 12 said they had difficulty completing the form
- 19 said they liked the form
- 13 said the form could be improved

How can the form be improved? You said...

- ✓ A simpler form would be appreciated in relation to individuals in receipt of benefits only
- ✓ I was unhappy I had to enclose details of personal accounts, as the adult's money went into my account for a few weeks. I feel this could have been calculated more easily as the balance in accounts balanced.
- ✓ Bank statements and receipts should be sufficient. Information requested shows great distrust of guardianship – especially to families dealing with strong emotional parent issues
- ✓ We found the space very limited in section 3. A bit more space in sections 4 & 9 would be good. Maybe official extension sheets could be supplied.
- ✓ Would be helpful to know if bank statements could be printed from my online banking rather than be ordered through the post as they were significantly delayed by the bank.
- ✓ Too difficult to give correct information as I'm not an accountant.
- ✓ Section 10 – care funding, more than one statement was applicable and I was unsure how the most appropriate was defined.
- ✓ I liked parts of the form but I found the part where you make the two totals add up.
- ✓ Much too like accounts. Many people don't have these skills
- ✓ It is always good to see a completed form to give an idea of what is required. This would've been helpful.

Advice and assistance

- 13 said they contacted us for help to complete the form
- 26 said the guidance notes were helpful
- 22 said the examples provided were relevant
- 8 said they could be improved

We asked you about our guidance notes: You said...

- ✓ As the first time completing the forms I found them easy and straightforward which was a big relief as I was actually dreading it.
- ✓ The form and the guidance notes were pretty straightforward but I still needed clarification on a few things. I contacted you and found the staff to be extremely helpful and very encouraging. This helped me with the completion of the form because I knew I could call back if there was a problem. If I could make one observation on the process it would be this – I was late in completing and submitting my forms. I had already contacted the office and they gave me an extension. A few days later I received a very formal letter to say that if I delayed any further my case would be referred to the Sheriff. Whilst I know that there is a legal obligation to complete the form I was terrified by the letter. It might be a softer approach for someone to telephone the guardian to ask if everything is ok? Staff are so friendly that the severe letter doesn't add up to the service being offered.
- ✓ The Guidance notes didn't really help me.
- ✓ The guidance notes were pretty straightforward and helpful.

- ✓ Too difficult. I had to get a solicitor to help as I was afraid of getting the figures wrong as wording on the form and paperwork felt very threatening.
- ✓ There was some uncertainty about whether to include my son's SDS payments in some of the finance sections. However, it was clarified when I phoned. Staff were very helpful and pleasant when I enquired over the phone.

We have reviewed the findings

We will...

The findings of the survey are useful, particularly those provided by lay guardians. There are aspects that we can take on board to improve our guidance, form and our letters.

The survey response from the professional guardians was low. We are keen to hear more from this group because of their experience of working with the current forms and the piloted version. Therefore we will run another consultation and information gathering exercise in the next 3 months.

We trust that this will provide more information to help us get the form right. The results will be published on our news page and the actions we take will be published on our 'You said... We did....' list