

# MASSACHUSETTS GUARDIANSHIP POLICY INSTITUTE -

## WHO WE ARE AND WHAT WE DO

- ▶ 1. Brief History of Organizing and Advocacy
- ▶ 2. The Institute -<https://guardianship.institute/>
- ▶ 3. Center for Guardianship Excellence -  
<https://guardianshipcenter.org/>
- ▶ 4. Public Guardian Services -  
<https://www.publicguardianservices.org/>
- ▶ 5. Newsletter, Beyond Guardianship, Feb.2026  
<https://guardianship.institute/newsletter-February-2026/>



# MASSACHUSETTS DOES NOT HAVE A STATEWIDE PUBLIC GUARDIAN PROGRAM



MASSACHUSETTS  
Guardianship Policy Institute

## 2014 Task Force Massachusetts Policy Institute

### 1. Identified stakeholders & allies for steering committee

- ✓ Other advocacy groups
- ✓ Legislators
- ✓ State Courts
- ✓ Elder Law Attorneys

### 2. Identified unmet needs and cost savings

- ✓ Collaboration with Harvard Medical School found 3000-4000 at risk adults in need of guardianship with no decision-makers
- ✓ Study revealed patient health crisis
- ✓ Study revealed cost overruns for hospitals

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## 2014-2025: Massachusetts Policy Institute

### 3. Advocacy through education

- ✓ Organized conferences to share public guardian program models from other states, alternatives to guardianship, diverse populations, rights of adults facing guardianship, obligations of guardians
- ✓ Filed bills to establish and fund statewide public guardianship
  - Held legislative briefings, recruited sponsors for Medicaid funding bill
  - Filed Guardian as Provider Bill
  - Law enacted requiring DPH to study and report on need for public guardians

# CENTER FOR GUARDIANSHIP EXCELLENCE

- ▶ Our vision is a world in which all guardians are trained and supported to be the best possible advocates for people with a guardian. We strive to make research accessible to those serving as guardians through fact sheets, infographics, and decision-making tools. We believe the Center's work will lead to high-quality support for people subject to guardianship.
- ▶ Research -
- ▶ Education - numerous free and low cost resources for family, and professional guardians, including best practices for decision-making; obligations of guardians; rights of persons facing guardianship; support groups and networking; trainings for guardianship certification; ethical issues.
- ▶ <https://guardianshipcenter.org/>



# PILOT PROGRAM BEGINS

## 2019 Pilot Public Guardian Services

- ✓ Non-profit with private funding
- ✓ Board included stakeholders
- ✓ Operating in 3 counties
- Model for the state
- Need for stable, adequate funding
- Person-centered guardianship



# PUBLIC GUARDIAN SERVICES' MISSION

- ▶ Public Guardian Services provides guardianship and conservatorship services to indigent Massachusetts adults in Suffolk, Norfolk and Plymouth Counties who are decisionally impaired and who have no other suitable person to help.
- ▶ Public Guardian Services provides stability by making informed decisions about needed personal, medical, social and housing services while respecting our client's wishes, preferences, and capacity, maximizing independence, and choosing the least restrictive alternatives.
- ▶ Our approach as guardian is to support our clients so they can live as independently as possible.

# Staffing & Standards for Pilot Program



- ✓ Established standard for capacity, 20 cases per case manager
- ✓ Four experienced social workers with diverse backgrounds
- ✓ Each guardian brought work experience with 1+ populations we serve
- ✓ Person-centered social work methodology for understanding clients, client needs, client preferences and best practices for surrogate decision-making
- ✓ Executive Director/Legal Director
- ✓ Clinical Director
- ✓ Office Manager

# \$6,000,000 SPENT ON PILOT SO FAR



ANNUAL BUDGET \$1,000,000 to \$1,200,000 so far

✓ \$10,000 - 12,000 per client per year x 80 cases plus admin/overhead

## ✓ CASES

**Age 60+ = 58 clients,  
Age 18- 59= 18 clients**

✓ Guardian 78 (Guardian of the Person)

✓ Conservator 28 (Guardian of the Estate)

## ✓ LIVING ARRANGEMENTS

✓ SNF

✓ Assisted Living

✓ Community

✓ Hospital



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## MEET RICH, 56

### 2021 Referral

- ← Unhoused and living with Schizophrenia diagnosis
- ← Initial meeting during 1 of many hospitalizations
- ← Guardian spent time building trust while Rich was in the hospital. Learned about his life. Learned his concerns about meds. Not interested in housing.

### 2023 New Diagnosis

- Cancer diagnosis with nursing home recommendation. Rich refused. Finally agreed to group home with support for taking meds
- Guardian took him to medical appointments, encouraged treatment

### 2025 Remission & Stability

- Safe and comfortable home and proper medications



# CHALLENGES & Ethical Issues



## Client-Related Challenges

- ✓ People with complex social & medical cases
- ✓ People who are difficult to find homes for
- ✓ Geographic issues using time
- ✓ Family dynamics that involve anger, etc.
- ✓ Unexpected necessary expenses
  - Example: \$20,000 costs for litigation with family members

## Ethical Challenges

- ✓ Decision-Making standards
- ✓ End of Life decisions including DNR/DNI

# LESSONS LEARNED

## 10-Year Review & Recommendations



- ✓ Social work, person centered guardianship
- ✓ Secure dedicated and sufficient funding to ensure sustainability
- ✓ Recognize the strong potential of cost savings in other areas
- ✓ Learn from successful models in other states
- ✓ Need for strong organization and leadership
- ✓ Foster collaboration and leadership among stakeholders to promote a unified and effective approach to policy reforms
- ✓ Ten Year Review and Recommendations - <https://guardianship.institute/ten-year-report-on-public-guardianship-massachusetts/>