



UNDERSTAND + DOCUMENT

Skills Assessment to Identify Strengths of Individuals Under Guardianship

Tools for Effective Guardianship



JOB AID

guardianshipcenter.org

Home, Safety + Comfort Skills	Observation Notes + Action/Change Needed
Transferring (to legs, to walker, to wheelchair)	
Bathing (shower, bath, teeth, clean hands, clean feet)	
Grooming (hair, nails, shaving, tweezing)	
Tidying of personal areas (bedroom, bathroom, closets)	
Simple meal preparation (cold cereal, juice, yogurt, milk)	
Shopping (get to shops, purchase needed items, pay, return home, put away so items can be found when needed)	
Laundry (get clean clothes, sheets, and towels by performing tasks or delegating tasks to an expert)	
Meals (get meals by preparing, buying, or delegating meal tasks to an expert and then eating healthy food)	
Locking doors, checking for open windows, appliances off	
Sleep comes easily at bed time (no recurring nightmares, breathing issues or interruptions)	

Work Life Skills	Observation Notes + Action/Change Needed
Waking on time for activities, school, or work	
Transportation to work or school (using public or private transportation to get where needed on time)	
Successfully perform at work or school	
Exhibit leadership, creativity, skills at work or school or volunteer activities	
Manage work, school or volunteer scheduling (on time arrival for day's start meetings and events)	
Manage work or school books, tools or materials (organize, find when needed, use appropriately or as directed)	
Caring for others (coordinating or performing child care, parent care, or delegating to an expert)	
Use technology (devices for communication, research, security, information)	

Social and Personal Skills	Observation Notes + Action/Change Needed
Individual activity participation (sports, exercise, reading, religion, music, entertainment)	
Social activity participation with friends/family/neighbors (sports, exercise, games, group events, religious activities)	
Kindness and consideration for others	
Attachment and sustainment of close personal relationships (love, friendship)	
Articulate wants, needs, or feelings (describes preferences, makes decisions about activities, expresses joy or sadness, advocates for own choices)	
Self-awareness of strengths and weaknesses	

Healthcare + Medical Decision-Making Skills	Observation Notes + Action/Change Needed
Managing medications (finding them, taking them as prescribed)	
Management of chronic or advancing illnesses (if any)	
Schedules and attends Doctor appointments, as needed	
Answers medical questions honestly and accurately	
Asks medical and healthcare questions (documents or remembers answers)	
Takes action on medical advice to prevent self-harm	
Describes outcomes or consequences as explained by Doctors	
Provide informed consent (participate)	
Able to discuss end of life wishes (has advance directive, can express preferences or beliefs)	

Financial Management Skills	Observation Notes + Action/Change Needed
Pays bills (on time, within budget, or delegating tasks to an expert)	
Manages budget (aware of spending, curtail as needed, plan for purchases)	
Spends available funds (on self, helps others, donates to charities)	

Preferences, Values, Goals, Dreams + Worries	Observation Notes + Action/Change Needed
Preferences for food, clothing, religion, ways to spend time	
What makes the individual's face light up?	
Immediate short term goals (may be related to current challenges)	
Long term goals	
Stressors	
End of life preferences	
Other issues and challenges	