

How Engaged in Legal Planning for Incapacity and Death Are Canadians? A Mixed-Methods Survey

Dans quelle mesure les Canadiens s'intéressent-ils à la planification juridique en cas d'incapacité ou de décès? Une enquête à méthodes mixtes

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Appendix 1

LEGAL ENGAGEMENT PLANNING SURVEY

Life can sometimes throw us unexpected curve balls. For some, this may be an illness or injury rendering us incapacitated and unable to look after ourselves. For others, this may be premature death. In this survey, “incapacity” or “incapacitated” means not having the ability to understand information that is relevant to the making of a decision and the inability to appreciate the reasonably foreseeable consequences of the decision. To be optimally prepared for a state of incapacity or death, individuals need to have a medical plan in place (advance care planning), have a designated someone to speak and make decisions for them if they are unable to do so and leave instructions for this person.

In this survey, we are trying to understand how to best help people prepare for the future, particularly as it relates to legal planning documents and procedures. We will ask you about your experiences and opinions. We may ask about things that you have already done or have not thought about at all. Please give us your honest opinions; there are no right or wrong answers.

KNOWLEDGE

These first questions ask about your understanding of the legal procedures and documents necessary to protect your loved ones and your assets in the event of your incapacity or death.

(Circle the best answer.)

Do you understand...	Not at all	A little	Somewhat	Fairly	Extremely	Not sure
1. how your affairs will be handled if you become incapacitated?	1	2	3	4	5	8
2. the consequences of not having designated someone to speak and act for you if you become incapacitated?	1	2	3	4	5	8
3. how your loved ones and assets will be handled upon your death?	1	2	3	4	5	8
4. the consequences of not having a will?	1	2	3	4	5	8
5. what questions to ask a lawyer about planning for incapacity or death?	1	2	3	4	5	8

CONTEMPLATION

These questions ask about how much you have thought about something.

(Circle the best answer.)

How much have you thought about ...	Never	Once or twice	A few times	Several times	A lot	Not sure
6. the importance of planning for the possibility of incapacity?	1	2	3	4	5	8
7. the importance of estate planning, including having a will?	1	2	3	4	5	8
8. seeking information about planning for incapacity or death?	1	2	3	4	5	8
9. asking a lawyer about planning for incapacity or death?	1	2	3	4	5	8
10. hiring a lawyer to assist with drafting and finalizing legal forms (will, power of attorney, etc.)?	1	2	3	4	5	8

CONFIDENCE

These questions ask about how confident you are to move forward in these planning activities.

(Circle the best answer.)

How confident are you that today you could ...	Not at all	A little	Somewhat	Fairly	Extremely	Not sure	Prefer not to answer
11. seek out information on legal matters related to planning for incapacity or death?	1	2	3	4	5	8	9
12. ask questions of a lawyer about planning for incapacity or death?	1	2	3	4	5	8	9
13. hire a lawyer to assist with drafting and finalizing legal forms (will, power of attorney, etc.)?	1	2	3	4	5	8	9
14. If you lack confidence in doing one or more of the activities above, please explain the reason(s):							

READINESS

These questions ask about how ready you are to move forward in planning for incapacity or death? (Tick the box that represents your best answer.)

How ready are you...	
<p>15. to seek out information on legal matters related to planning for incapacity or death?</p> <p>1 <input type="checkbox"/> I have never thought about it.</p> <p>2 <input type="checkbox"/> I have thought about it, but I am not ready to do it.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Why not?</p> <p>_____</p> <p>_____</p> <p>_____</p> </div> <p>3 <input type="checkbox"/> I am thinking about doing it in the next six months.</p> <p>4 <input type="checkbox"/> I am definitely planning to do it in the next 30 days.</p> <p>5 <input type="checkbox"/> I have already done it.</p>	<p>8 <input type="checkbox"/> Not sure</p> <p>9 <input type="checkbox"/> Prefer not to answer</p>
<p>16. to ask questions of a lawyer about planning for incapacity or death?</p> <p>1 <input type="checkbox"/> I have never thought about it.</p> <p>2 <input type="checkbox"/> I have thought about it, but I am not ready to do it.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Why not?</p> <p>_____</p> <p>_____</p> <p>_____</p> </div> <p>3 <input type="checkbox"/> I am thinking about doing it during the next six months.</p> <p>4 <input type="checkbox"/> I am definitely planning to do it during the next 30 days.</p> <p>5 <input type="checkbox"/> I have already done it.</p>	<p>8 <input type="checkbox"/> Not sure</p> <p>9 <input type="checkbox"/> Prefer not to answer</p>
<p>17. to formally engage a lawyer to assist with drafting and finalizing legal forms (will, power of attorney, etc.)?</p> <p>1 <input type="checkbox"/> I have never thought about it.</p> <p>2 <input type="checkbox"/> I have thought about it, but I am not ready to do it.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Why not?</p> <p>_____</p> <p>_____</p> <p>_____</p> </div> <p>3 <input type="checkbox"/> I am thinking about doing it during the next six months.</p> <p>4 <input type="checkbox"/> I am definitely planning to do it during the next 30 days.</p> <p>5 <input type="checkbox"/> I have already done it.</p>	<p>8 <input type="checkbox"/> Not sure</p> <p>9 <input type="checkbox"/> Prefer not to answer</p>
<p>18. If you have not hired a lawyer to assist with drafting and finalizing legal forms, what are your main reasons for not doing so?</p> <p>_____</p> <p>_____</p> <p>_____</p>	
<p>19. If you have completed all your legal planning documents, what were your main reasons (or motivations) for doing so?</p> <p>_____</p> <p>_____</p> <p>_____</p>	

20. Age: ____
21. Your gender? <input type="checkbox"/> Female <input type="checkbox"/> Male <input type="checkbox"/> Other <input type="checkbox"/> Prefer not to say
22. Which of the following best describes the highest level of education that you have completed? <input type="checkbox"/> Did not complete secondary school or high school <input type="checkbox"/> Completed secondary or high school <input type="checkbox"/> Had some university education or completed a community college, technical college or post-secondary program (e.g., trade, technical or vocational school, CEGEP) <input type="checkbox"/> University degree (e.g., BA, BSc, BSN) <input type="checkbox"/> Graduate degree (e.g., MD, DDS, DMD, DVM, OD, Master's or PhD)
23. Where do you live? _____ City, province/state, country

END OF QUESTIONNAIRE. THANK YOU FOR YOUR PARTICIPATION.