

Ursuline's Guardianship Program: Quality, Caring Service Since 1984

For more than 25 years, Ursuline Senior Services has provided a guardianship program primarily for persons more than 60 years old, typically low income, and who are referred for guardianship through the Area Agency on Aging (AAA) of the Allegheny County Department of Human Services. Today such referrals most often are the result of Protective Services investigations.

The program began in 1984 through a contract with the Allegheny County Department of Aging; today, Ursuline is the sole agency in Allegheny County under contract to provide such services for this segment of the population. In addition, Ursuline Senior Services entered into an agreement with Allegheny County to serve as the guardian for residents referred who reside in the four Kane Regional Centers.

"This is what we refer to as the 'Public (Contract) Program,'"

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Beal Bank Invests Time, Talent in Ursuline Senior Services

When Beal Bank moved into the Pittsburgh market in December, 2010, it brought not only a commitment to its new customers, but one to the community as well.

That community commitment—to go beyond being just a business and become an active, giving member—has been demonstrated already through its partnership with Ursuline Senior Services.

According to Pittsburgh office manager Beverly Watt, Beal Bank's interest in providing service to others originates at the corporate level.

Headquartered in Dallas, Texas, Beal Bank, one of the nation's largest privately owned financial services companies, was founded in 1988. Rather than sprouting a branch office on every corner, Beal Bank prefers to open one office per city; its network currently includes 38 offices in major metropolitan areas across the U.S. Beal Bank's parent company, Beal

Financial Corporation, is one of the nation's largest privately owned financial services company. Its Pittsburgh area office is in Bethel Park.

"Per the Community Reinvestment Act, our corporate folks require 16 hours of community outreach per month but also encourage us to over-achieve," said Watt. "We

routinely do more than 16; one month we did 80."

This effort began at Ursuline in June, 2012 after Beal Bank contacted the agency in the

fall of 2011 seeking ways the bank's staff could participate in a volunteer opportunity.

"We started by visiting seniors in their homes and assisting them with paying their bills," said Watt. "We are thrilled with that opportunity. Our staff consists of four people; most of us have two seniors that we work with, and one has more than two.

"This truly is our pleasure. A bond develops between each of us and the senior we are assisting... We become friends with these seniors and that is very nice."

—Beverly Watt, Beal Bank

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Volunteer opportunities abound at USS and GGC.



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Ursuline is helping seniors to sign-up with federal GO Direct program.

“This truly is our pleasure. A bond develops between each of us and the senior we are assisting. It really is quite poignant and sweet. We become very comfortable with each other and we look forward to doing this work every month. We become friends with these seniors and that is very nice. We take cupcakes and flowers to them often to brighten their days.”

After a pause, Watt added, “There is one difficult part. We become very close to the seniors we help and when one passes away, that truly is the difficult part. It’s heartbreaking. We feel grief and a real sense of loss.”

So genuine was the connection between the Beal Bank staff and Ursuline that it wasn’t long before more opportunities for involvement were found.

“From day one, this group of volunteers has exceeded expectations of our agency,” Said Karen Tobin, Ursuline Volunteers Programs Division director who conducted an initial workshop with the bank staff. “Earlier this year, we were informed that their corporate office was very satisfied with the volunteer relationship and was encouraging the staff at Beal Bank to engage with our organization in an unlimited capacity. So we began having

conversations about what other opportunities were available.”

It was during this time that Watt was asked to further expand her activities with Ursuline when she was invited to serve on the agency’s AARP Money Management Advisory Council. Soon a conversation began around whatever opportunities are available. A natural fit showed itself in Ursuline’s Guardianship Services Division, said Director Judy McClelland.

“Allegheny County Orphan’s Court requires us as the legal guardian of estate to complete a final accounting once one of our wards has died or we close the case,” said McClelland. “The final accounting basically accounts for every penny that the ward received over our time as their guardian and every penny that we spent on their behalf.

“It could be over one or two years or, as in some cases, we have had wards for 10 to 15 years. You can imagine those final accountings can be a bit time consuming.”

Added Tobin, “As a result of diminished budget and constraints on staff time, concerns for reconciling the final accounting in the Guardianship division became an issue. Beal Bank saw this as an opportunity to continue to

help Ursuline Senior Services and began supporting the Guardianship program in February. Soon this dynamic team of volunteers became our ‘go to’ group when an immediate match or special needs client was on top of the list.”

To date, Beal Bank has worked on approximately 10 final accountings and plans to continue to expand this assistance.

“We had a bit of a backlog and they are really helping us to stay on track,” said McClelland. “We get them the ward’s information on a flash drive and they can do the rest of the work at their convenience.”

So far it would be hard to determine who might be getting the better of the relationship between Beal Bank and Ursuline Senior Services.

“We searched a lot for the right opportunity to volunteer,” said Watt. “It had to be something that allowed us to use our basic banking skills. Ursuline was the perfect organization for us. They have been good to work for, they have been nothing if not open to understanding our needs, and extremely accommodating. We continue to look forward to serving in other capacities.” 



Mission Statement—
Helping older adults age with dignity.

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All About US
“Going Green!”

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Seeding the Future...

by Tony Turo
Executive Director

Seven years ago, in the summer of 2006, I shared in this column one of my personal senior “heroes,” Josephine Fundoots. Josephine’s story was as endearing as the lady herself. During World War II, Josephine worked as a “Rosie the Riveter” at Sharon Steel. Long after that, I first met Josephine when she was the Lawrence County Area Agency on Aging (AAA) Title V Senior Employment Program Specialist. She explained to me once that she only came to the AAA—at the age of 70—after retiring from her former career of many years, because she overspent on her credit cards at Christmastime. Her husband was strongly against using credit cards, and she hoped to have them paid off with what she would make in her “temporary job” with the AAA before he ever found out. Almost 23 years later, at nearly 93 years of age, I guess she finally paid the cards off! That year, Josephine Fundoots once again navigated into the waters of retirement.

This past spring, just short of her 100th birthday, Josephine stepped into her final retirement when she passed away on March 24, 2013.

During her many years at the Lawrence County AAA,

Josephine served as the Lawrence County representative on the Southwest Regional Council of the Pennsylvania Council on Aging (PCOA) and, for a time, as a member-at-large on the PCOA at the state-level. In 2004, she received the Gold and Silver Award and the Governor's Achievement Award both through the PA Department of Aging. That same year, Josephine also received the Experience Works Pennsylvania Senior Employee of the Year Award. Through her very presence, as much as through her strength of conviction, Josephine helped to carry the needs of community elders to the policy-makers in Harrisburg at every opportunity.



Josephine Fundoots and Tony Turo share a smile at Jo’s 2006 “retirement” party!

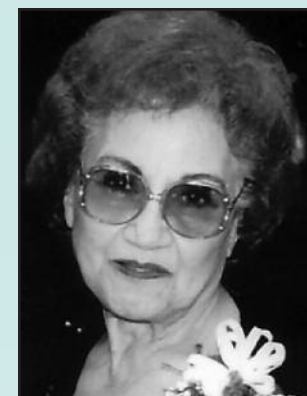
Josephine was a hero of positive aging who lived what she believed—never stop moving to take advantage of all that life has to offer. Josephine was known for always being dressed to the nines in designer clothes, makeup and high heels. She

believed all women needed to be strong and independent. Josephine was an avid walker, enjoyed working crossword puzzles and cherished the times she spent with her family and friends. Even at the age of 93, not content to adopt a life of leisure, Josephine, who moved to Kent, Ohio to be close to family who lives there, enrolled in her first college-level psychology class that fall!

Not all of us will age with the energy and fortitude of my friend Josephine. That’s one of the key reasons Ursuline Senior Services exists, to help older adults age with dignity, despite the struggles they may bear in their own aging journey. Through the services we provide, our staff and volunteers are privileged to meet and support so many amazing individuals who, despite the challenges they face, show us every day what it means to age positively and gracefully! Like Josephine, you encourage and inspire US!

God bless,

-Tony Turo



*Josephine Fundoots
Sept. 17, 1913 – Mar. 24, 2013*

said Ursuline Executive Director Anthony Turo. “At any given time, there are 100 to 150 persons who have guardians in this program.”

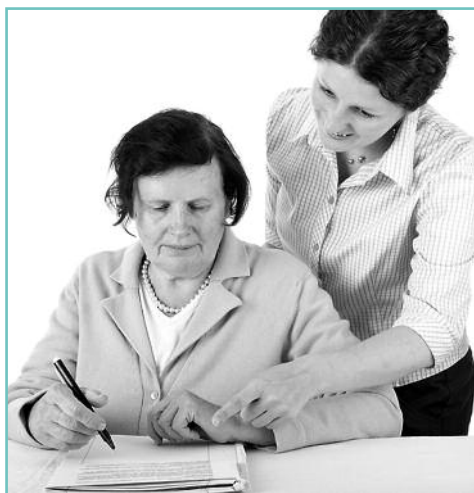
Also according to Turo, Ursuline offers what is called the Court Support program that is also part of the public initiative funded through the Allegheny County contract. Court Support program referrals come through the Orphans’ Court division of the Allegheny County Court of Common Pleas from family members, attorneys, nursing homes, the Veterans’ Administration, hospitals or other institutions. This was added to the AAA contract once the need for Guardianship service for this additional indigent population was identified.

Ursuline Senior Services is a member agency of the National Guardianship Association (NGA) and Ursuline guardians follow NGA standards and guidelines. Currently, one half of the Guardianship staff are National Certified Guardians.

In addition to its work with the county, Ursuline provides a broad array of guardianship to clients who do not meet the contract criteria for services inside and out of Allegheny County. These services are provided through the agency’s Private (Fee-for-Service) Guardianship component or as a result of the availability of its Special Needs Trust. Ursuline provides these services to individuals residing throughout the western Pennsylvania area, including the county nursing home in Cambria County.

What is Guardianship?

According to the National Guardianship Association: The Fundamentals of Guardianship: What Every Guardian Needs to Know, “Guardianships are established only through a legal process and are subject to the supervision of the court. . . . All guardianships should be based on the decision-making capacity of the individual without regard to the mental or medical diagnosis.



Overall, guardians act “in the best interest” of their wards to make decisions for their health, safety, and physical and financial welfare.

Every guardianship should be designed and limited to meet individual needs. All individuals should be presumed competent until a court proceeding determines otherwise.”

USS provides Guardians of Person and/or Guardians of Estate as the court appoints for people who are legally declared incapacitated in Orphans’ Courts in a number of counties in Western Pennsylvania. Once Ursuline Senior Services is appointed as guardian by an Orphans’ Court judge, its duty is to follow what each individual court order states. Overall, guardians act “in the best interest” of their wards to make decisions for their health, safety, and physical and financial welfare. Ursuline Guardians are available 24/7 every day of the year through an “After Hours On-Call” system.

Durable Powers of Attorney (DPOA)

Powers of Attorney or Durable Powers of Attorney are documents usually completed through an attorney which allow another person to act as “agent in fact” for the person. DPOA is a less restrictive alternative to guardianship which, when used in the best interest of the person, can be very helpful. However, because there is no supervision by a court, new documents can be signed appointing different persons, thus problems can arise. Occasionally, the Guardianship Director or out-of-county Program Coordinator will agree to serve as Durable Power of Attorney (DPOA) for clients who have capacity, need those services and have no family members or friends to act on their behalf.

Volunteer Opportunities Abound at Ursuline

It is no exaggeration to say that without the support of dedicated volunteers, Ursuline Senior Services and the Good Grief Center for Bereavement Support (GGC) could not maintain the high level of quality services they provide to the community.

Whether volunteering as individuals or as part of a business or organization, these caring men and women provide a level of compassion and service unsurpassed by other organizations. As Karen Tobin, Ursuline Volunteer Programs Division director put it, “We simply are able to do what we do because our volunteers make such a difference on the lives of those we serve.”

What makes volunteering at Ursuline or its Good Grief Center so attractive to many is the wide variety of opportunities available. While these vary in time commitment and responsibilities, each provides a chance for caring individuals to make a real difference in the lives of others.

Opportunities include serving in the AARP Money Management Program, assisting low-income elderly persons who have difficulty with their financial affairs and problems maintaining their finances; Cart to Heart, which matches volunteers with local seniors who need help with grocery shopping; and Senior Reassurance, which connects

a volunteer caller with a senior via a brief daily wellness call.

The Good Grief Center, too, is always eager to welcome new volunteers, according to GGC Division Director Diana Hardy.

VOLUNTEER OPPORTUNITIES

- AARP Money Management Program
- Cart to Heart
- Senior Reassurance
- Good Grief Center

For more information:

412-224-2700 x13

www.ursulineseniorservices.org

www.goodgriefcenter.com



“GGC volunteers provide support, education and awareness and—in the process—instill hope in people who are grieving,” Hardy said. “Volunteers work alongside staff at our location in Squirrel Hill and they can choose from a variety of opportunities.”

Both Ursuline and GGC request a commitment of at least one year, which allows for

training, stability and the chance for volunteers to get to know both staff and those who are being served. For GGC, it is hoped that volunteers will dedicate about four hours per week. Some professionals opt to facilitate support groups; they usually agree to two groups per month, with each group running approximately 90 minutes.

“Support group facilitating is an area where we could use more volunteers right now,” Hardy said.

General Office Support is another area open to volunteers, Tobin said. “We always have need of help for mailings, computer data entry, filing, emails, receptionist duties and phone calls. Even if you don’t possess computer skills, we can still use your help. If you have a passion for helping others, a good sense of humor and want to increase our ability to serve others, we need you to volunteer now.”

Added Hardy, “A focus for all volunteers serving our organization remains at the center of discussion with GGC and the division director of volunteer programs. Our effort is to strengthen the core of volunteers and have a seamless process benefiting the entire agency.”

To obtain more information about volunteer opportunities, call 412-224-2700 x13 or visit www.ursulineseniorservices.org or www.goodgriefcenter.com.



Who Needs a Guardian?

The basic reason that a person needs a legal guardian is because he or she lacks “capacity.” Defined briefly, capacity means the ability to make and/or communicate **effective decisions** for his or her own health, safety, welfare and finances. If someone has signed a Durable Power of Attorney (DPOA) when she or he still had capacity, usually Guardianship is not needed. When a person has no one willing to act on his or her behalf in the medical and financial arenas, or family members are in conflict about which one should assume responsibility, and a psychologist or psychiatrist has determined that the person cannot act for him or herself, then Guardianship proceedings can be initiated by an attorney.

Guardians of Person

Overall Guardians of Person (GOPs) make medical, placement and end-of-life decisions. Ursuline Senior Services employs four full-time Guardians of Person. In addition, the Director and Program Coordinator sometimes serve as GOPs. The Guardians of Person are responsible for ensuring that the day-to-day needs of their wards are met, including safety and appropriate medical care. Approximately one third of the wards assigned to Ursuline have no living family members, so their GOPs are the only “family” they have. When there are family members who desire to be involved, GOPs keep in touch with families about the progress of their loved ones.

Ursuline Assists Seniors in Federal “GO Direct” Sign Ups

Increasingly it is becoming a paperless world. The latest example of this trend occurred March 1, when the U.S. Treasury initiated a process called GO Direct to eliminate paper checks for most federal benefits and non-tax payments. With few exceptions, the mandate includes Social Security, SSI, Veterans Affairs, Railroad Retirement Board, Office of Personnel Management benefits and other non-tax payments.

According to the Social Security Administration, the switch to Go Direct was made because electronic payment has benefits over an old-fashioned paper check. These include safety, ease and reliability. Additionally, it is good for the environment and it saves taxpayers money by eliminating postage, paper and printing.

Despite such benefits, such a change could be disconcerting to some individuals used to doing something a certain way. Knowing that this new program could cause concern and confusion for many of the people it serves, Ursuline Senior Services moved quickly to assist in the transition.

In February, Karen Tobin, director of the Volunteer Programs Division, with the assistance of Supportive Living Enhancement Program (SLEP) service coordinators, launched an information program developed particularly for staff and residents of the Housing Authority of the City of Pittsburgh (HACP.)



Through community flyers and information sessions, Ursuline reached out to more than 1,000 city high rise residents, providing information and guidance.

“Information shared included the importance of having checking accounts, how to protect federal benefits and to see if any residents needed volunteers to assist them with bill-paying support,” Tobin said.

The Housing Authority supported the effort by reaching out through their network of Tenant Councils to promote the sessions. The GO Direct presentations eventually reached 11 HACP high rises and one private senior high rise. Residents learned that they could receive their payments through direct deposit to a bank or credit union account or a Direct Express® debit card account.

“We know change often can be difficult,” Tobin said. “So we are happy to have been there to help ease whatever concerns individuals might have had and to make this transition at least a little bit easier.”

For more information about GO Direct, visit www.go-direct.org or call the helpline at 1-800-333-1795.



Guardians of Estate

Guardians of Estate (GOEs) marshal all the assets and utilize all their income and assets for the care of each ward. Ursuline Senior Services employs three full-time Guardians of Estate, in addition to a Real Estate Specialist who is responsible for taking care of or selling wards' homes to utilize the funds for their care. GOEs also marshal bank accounts, stocks, bonds, life insurance policies, real estate, personal possessions and automobiles as well as income from social security, pensions and trusts to use for the care of their wards. They are responsible for creating budgets for each of their wards and setting up Irrevocable Burial Reserve accounts at banks if no funeral and burial arrangements had been made and paid for prior to Guardianship.

The basic reason that a person needs a legal guardian is because he or she lacks "capacity."

GOPs and GOEs work together with the wards and their family members to make final arrangements that the wards can afford and that are satisfactory to them and their families. Each GOE has a "fiduciary duty" to protect the rights and property of their wards.

For more information on Guardianship Services contact us at 412-345-0144 ext. 258 or guardianship@ursuline seniors.org



Ursuline Senior Services to Assist Commonwealth with Act 70 Enforcement

In October, 2010, then Pennsylvania Governor Ed Rendell signed into law Senate Bill 699 establishing the Adult Protective Services Act. Under the new law, Act 70, the Pennsylvania Department of Public Welfare (DPW) is charged with administering an adult protective services program to protect abused, neglected or abandoned adults between ages 18 and 59 who have a physical or mental impairment that substantially limits major life activities. Specifically, these individuals must have a cognitive or physical disabilities, lack the capacity to protect themselves and who are at imminent risk of abuse, neglect, exploitation or abandonment.

The Act requires employees and administrators of facilities where adults covered under the act receive services to report suspected abuse. This new program fills a gap between Pennsylvania's existing protective service systems for children and the one for older adults over age 60.

“Through this collaboration Ursuline will ensure consistent and timely investigations of any allegations of abuse, neglect, abandonment or exploitation of adults with disabilities.”

— Michelle Smart, Protection and Support Services Division Director, Ursuline Senior Services

The Pennsylvania Department of Public Welfare and the Pennsylvania Department of Aging has implemented an interim period for agencies to provide Adult Protective Services in specific contracted areas. According to Michelle Smart, Ursuline Senior Services Protection and Support Services Division director, Ursuline has been asked to cover Adult Protective Services across Allegheny County for the current interim period through June 30, 2014.

“Through this collaboration Ursuline will ensure consistent and timely investigations of any allegations of abuse, neglect, abandonment or exploitation of adults with disabilities,” Smart said.

The Pennsylvania Department of Public Welfare is preparing to publish a Request for Proposal to procure agencies to provide Adult Protective Services beginning July 1, 2014. To report suspected abuse for ages 18-59 please call toll free 1-800-490-8505.



Ursuline

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World Elder Abuse Awareness Day

The World is Watching, the World is Listening

This past month, in honor of WEAAD, all across the world, advocates, victims, services providers and others brought attention to elder abuse in myriad ways. APS programs across the US organized and/or participate in many of these activities.

Here in Pennsylvania, PA Department of Aging Secretary Brian Duke chose Pittsburgh as the venue to recognize WEAAD with an event held at Cumberland Woods Village, a UPMC independent living community


attached to the UPMC Passavant Hospital campus in the North Hills. Along with Secretary Duke, PA Supreme Court Justice Debra Todd, Allegheny County Area Agency on Aging Administrator Mildred Morrison and Deborah Brodine, President of UPMC Senior Communities, were on hand to speak to residents and providers in attendance about the important work in our county and across the state protecting our vulnerable senior neighbors from the ravages of self-neglect, caregiver neglect,



financial exploitation, physical abuse and sexual abuse. Secretary Duke also shared a

proclamation from Governor Corbett declaring the day, and the month of June, for Elder Abuse Awareness across Pennsylvania.

There is No Excuse for Elder Abuse

Anyone who believes that an older adult is being abused, neglected, exploited or abandoned should call the Pennsylvania Department of Aging's confidential elder abuse hotline at 1-800-490-8505. 



www.ursulineseniorservices.org
www.goodgriefcenter.com

United Way Donor Designation Code: 281



Ursuline Senior Services was awarded this Seal of Excellence by the Pennsylvania Association of Nonprofit Organizations (PANO), under the Standards for Excellence.