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,’”

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.

“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.

“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

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

“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. 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.

“We are searching 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.”

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.

“Administrative Staff
Anthony J. Turo, MPA
Executive Director
John Daub, BA, Cert in Acctg.
Business Office Manager
Elaine Resetar
Executive Assistant

Division Directors
Diana Hardy, MSCP, NCC, LPC
Good Grief Center
Judy McClelland, MHA
Guardianship Services
Michelle Smart, MS, NPM
Protective & Supportive Services
Karen Miller Tobin, MEd
Volunteer Programs

Helping older adults age with dignity.

Mission Statement—

Beal Bank cont. from Page 1

“Going Green!”

If you would like future copies of this newsletter to be delivered to your inbox, please email US at info@ursulineseniors.org. Please indicate that you would like to receive All About US electronically from now on.
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!

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
degree’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.

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.
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.

“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.
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.
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.

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.
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.