

ANNUAL REPORT

2012–2013



From the EXECUTIVE DIRECTOR

Even my friends who really like winter and eagerly look forward to it each year (admittedly so few in number that they could meet in the proverbial phone booth—if they could find one) tell me they enjoy the transition from that season to spring. Regardless of age, most people find spring to be the most invigorating of seasons, paralleling as it does with the return in this part of the country of warm weather, leaves on the trees and robins hopping across fresh grass.

Yet as I think about how welcome this transition is I also cannot help but compare it to the transition Ursuline Senior Services went through in the winter of 2012, when Allegheny County chose not to renew our Care Management Program, forcing us to adjust to a decreased budget, which prompted the elimination of many staff positions. There is no other way to describe it: those were difficult months indeed.

But it is during such tough times—like facing a long, grueling winter—that we discover an inner resolve that perhaps we didn't think we, or those working with us, possessed. I will remember that period in our history for the frustration I felt at a lost contract (and the concurrent loss of being able to serve so many in need across our community); but I will remember it even more so for the response I saw from our staff, our board, our volunteers and our supporters who absorbed the blow and determined, together, to reposition our organization so that it would be stronger than ever and recommitted to providing the highest level of care to those we continued to serve.

There's more we can learn as we live through the annual transitions from each season to the next. I find a certain comfort in knowing that, unfailingly, spring will conquer winter, summer will flow from spring, autumn will envelope summer, and then the cycle begins again with winter. I believe that same sort of dependability exists here at Ursuline, whether a person comes to us seeking senior services or grief support. Over the years, staff and volunteers may have changed and even some of our techniques and practices have been refined to reflect current best practices. But what hasn't changed is the essence of Ursuline: our unwavering commitment to those seeking our help.

Of course, I couldn't say this if I wasn't sure of the unwavering support we receive from those who continue to support Ursuline, whether through financial gifts or volunteer hours. While we rely on you for this support, I assure you that we never take it for granted and we never cease to feel true gratitude that you are out there, helping us to help others who find themselves in the challenging transitions of their lives.

Let me close by saying that, just as each season brings with it new opportunity, Ursuline will remain vigilant in seeking new and better ways to help others. We know the road will not always be smooth and we expect additional disappointments and challenges along the way but, together, I know we will remain a strong and vibrant organization for as long as we are needed. Thank you, and THINK SPRING!

— Tony Turo

PROGRAM REPORTS

Protective Services

Protective Services program received 617 Reports of Need during the 2012-2013 fiscal years. These reports include allegations of self-neglect, caregiver neglect, abandonment, physical, sexual or emotional abuse and financial exploitation. Investigators continue to collaborate with agencies such as: Area on Agency on Aging, Care Management Provider Agencies, Mental Health, Health and Welfare, Personal Care and Nursing Homes, Life Programs, Hospitals, Home Care, Law Enforcement, Attorneys, The Allegheny County Court System and other professionals. Collaborations with these agencies often assist Protective Service staff with investigating and reducing the risk for our seniors in need.

Protective Service Investigators are on call 24 hours a day, 365 days a year. During the past year the After Hours On Call Protective Services Investigator assisted with:

- ✓ 7 consumers with emergency placement options
- ✓ 11 emergency space heaters calls
- ✓ 13 emergency food calls,
- ✓ 10 emergency transportation
- ✓ 2 emergency court orders,
- ✓ 5 consumers with emergency clothing
- ✓ and 7 consumers with emergency medication.

Protective Services: Keeping Pete Safe

A Protective Services Report of Need was taken by the Allegheny County Area Agency on Aging and forwarded to Ursuline Senior Services Protective Services staff. A self-neglect report was initiated for an 81 year old widower named Pete. Pete lived alone in an apartment in the Pittsburgh area. The Reporter stated that Pete's memory is poor, is paranoid, becomes angry and is depressed. Reporter stated that the Pete's son told Reporter that his father is refusing to bathe and does not wear appropriate clothes. Reporter states the son told the Reporter that the apartment is filthy. It was reported that Pete does not allow anyone to help with cleaning the apartment. Pete received a non-renewal of the lease notice from the landlord due to housekeeping and nonpayment issues. Pete also did not paying his utility or health insurance premiums. The son reported that Pete is behind in all of his bills. Son tried to help Pete but he refuses to allow anyone to help him and becomes very argumentative with son. The son attempted to call numerous agencies for help with his dad but had no success.



Protective Services assisted the son with making the necessary move to keep Pete safe and improve his quality of life.

The Protective Services Investigator and Area on Agency Registered Nurse assessed Pete's ability to remain independent in his apartment. Pete's son also was at the evaluation and stated Pete had fallen the previous day while taking a walk in the neighborhood. Paramedics were called but Pete refused to go to the hospital. Pete did not remember the fall. Pete presented confused, agitated and medication was not being taken. His person and clothing were both dirty and odorous. The apartment was full of trash and in need of a thorough cleaning. Registered Nurse determined that Pete could not live alone and needed 24 hour supervision. Protective Services Investigator spoke in length Pete and his son about the options to reduce Pete's risk. Son who was Pete's Power of Attorney agreed emergency placement would be helpful until son could find a long term facility to assist his father. Protective Services Investigator convinced Pete to go temporarily to the emergency placement facility. Son described Pete as a very social person at one time. Upon arriving at the facility Pete appeared to be comfortable and fit right in with other residents. Within a few days the son found a permanent long term care facility for Pete. Pete is thriving mentally and physically at the facility. Protective Services assisted the son with making the necessary move to keep Pete safe and improve his quality of life.

Service Coordination

The Supportive Living Enhancement Program (SLEP) Service Coordinators complete many projects throughout the year. The Service Coordinators perform assessments for Wellness/I'm OK checks which are typically carried out every three to four months. SLEP Service Coordinators ask a series of questions such as; Are you OK? Are you familiar with the Service Coordinator who works in your building? Would you like them to come see you? In an emergency could you exit the building using the stairs if you had to or would you need assistance? Service Coordinators also attempt to confirm resident's phone numbers and disability? Other questions can include; number of emergency room visits, ability to pay for medications, if they are active with one or more activity outlets, and if they maintain regular medical visits. This is a program designed to unify the buildings as a community, whereas a tag was placed on the outside of a resident's

The Service Coordinator assisted the couple with an application for supplemental co-pay assistance. Finally the husband received his motorized wheelchair which enabled the couple to spend time together outside of the building.



door knob before retiring for the night, then removed in the morning. In theory, a floor monitor would check to see if any door tags remain on the outside knob. If so, the monitor would knock on that door to assure the resident was OK. This activity has allowed staff or floor monitors to find residents who are ill, have fallen and have other issues that may have gone unnoticed had someone not checked in. It also enables staff to update the "disabled list" that is kept in the NOX box that the fire department uses to see what residents may need assistance with evacuating their apartment in the case of an emergency. The second annual project is the fire drills which are a collaboration between Housing Authority City of Pittsburgh (for HACP buildings only), Pittsburgh Fire Bureau, Building Managers and Ursuline's Service Coordinators. There are 12 buildings scheduled in the month of October that affects over 1,000 residents. The information provided to residents are maps, safety locations and procedures in case of a fire. The last project is the Pennsylvania Property Tax or Rent Rebate Program. Service Coordinators arranged "Go Direct" presentations with Ursuline's Division Director of Volunteer Programs. These presentations were held during the month of February and March. During the presentations Service Coordinators completed rent/tax rebate forms. Approximately 800 tax/rent rebates were completed last fiscal year. The Service Coordination program was able to hire third staff person to work part time.

Service Coordination: Mobility and Savings

An 82 year old female lives with her 87 year old spouse. The husband has limited mobility. The wife approached the Service Coordinator to share her frustrations about her husband. The wife stated she felt confined to the building because of her husband's unwillingness to leave their apartment. The husband feels safe in the apartment. The Service Coordinator inquired if the couple ever considered a motorized wheelchair? The Service Coordinator suggested that the couple talk to the husband's doctor to see if the husband is medically eligible and if he is Medicare may pay part of the cost of the wheelchair. The doctor prescribed the motorized wheelchair. The Service Coordinator assisted the couple with an application for supplemental co-pay assistance. During a visit with the couple the Service Coordinator noticed cable and phone bills with large monthly payments. The Service Coordinator asked them about their usage and with their permission contacted the companies to negotiate better rates for them. Arrangements were made for services that they actually use and saved the couple \$43 dollars a month. Finally the husband received his motorized wheelchair which enabled the couple to spend time together outside of the building.

PROGRAM REPORTS

Guardianship

During the early months of the 2011-12 fiscal year, Ursuline's Guardianship Program was informed that, as a result of funding cuts at the state level, its funding through the Allegheny County Area Agency on Aging to provide public guardianship services (for Protective Services and Court Support referrals) was expected to decrease for the 2012-13 FY by more than 25%. After some negotiation with both the AAA and the Allegheny County Orphan's Court Division, the actual cut absorbed was closer to 20%. Even with the five percent reprieve, Ursuline Senior Services still had to reorganize its Guardianship Division and eliminate five guardian positions.

As a result, in order to come back into compliance with National Guardianship Association and with the support of our funder and the county court, we placed a moratorium on the acceptance of any but emergency (Protective Services) referrals until caseloads that quickly grew to more than 50 wards/guardian due to the staff cutbacks settled back into the 30-40 wards/guardian range, better keeping with the national standards. We also worked with each of the residential facilities housing our wards in regard to meeting another national standard related to physically visiting every ward at least monthly. Because Ursuline Senior Services takes its responsibilities of guardianship very seriously, we trusted that our remaining guardians and facility social workers and nursing staff would keep in close touch by phone so that Guardians would be informed of all important changes affecting their wards. As it turned out, within only a few months, the caseloads decreased back into a manageable size.

At the same time as the funding decrease and the resulting reduction in staff, Ursuline also welcomed a new Guardianship Division Director. Effective Monday, July 2, 2012, former Guardianship Program Director Ann Mason was succeeded by Guardianship Services Division Director Judy McClelland (formerly Community-Based OPTIONS/ Care Management Assistant Program Director for Ursuline). Transitioning through this very difficult program reduction in such a successful manner could not have occurred without the leadership of "both" Division Directors, the dedicated cooperation of the staff (past and present) and the network of professionals who either support or rely on Ursuline's Guardianship Services Division in any way. We thank everyone who helped us through this challenging transition very much for your patience and cooperation as we adjusted to our smaller, but very competent and certified guardianship staff complement.

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Volunteer Program

This year Ursuline Senior Services' Volunteer Division participated in cross-training with our newly merged organization The Good Grief Center. This unique opportunity for our organization has customized the ability for Ursuline to continue addressing the ways our service communities are impacted with a more comprehensive approach. The Volunteer Division responded to the concerns of The Pittsburgh City of Housing management that many of their residents were unaware of the upcoming change in government benefits through the GO DIRECT mandate.

This significant government change would be effecting a targeted residential city audience that would be greatly impacted and needed to be afforded the opportunity to make well-informed decisions. The Volunteer Division, with a grant from the PNC Foundation, was able to launch an awareness campaign, providing literature and materials to at least 1400 persons. Though the bulk of this outreach was to seniors, the audience included professionals and other community participants.

Through volunteer mobilization efforts, our standard volunteer programs have thrived throughout the year. Through the kindness and diligence of a team of volunteers, Ursuline's Cart to Heart Shopping Program continued to provide seniors in Allegheny County with a means to obtain groceries. The consistence of Ursuline volunteers allows seniors the security of knowing that their shopping needs are met on a regular and timely basis, enabling them to remain independent in the home of their choosing. Our volunteers, however, provide more than just groceries—they are a friendly face, a kind word, and a warm smile. After one shopping trip this past year, an older gentleman even called our administrative office directly just to sing the praises of his volunteer shopper. Through volunteer mobilization efforts, the program continues to grow, and we look forward to what the future holds.

The Senior Reassurance Call Program has also continued to be a consistent service of Ursuline's Volunteer Division. Through a daily wellness call, our volunteers help ensure the safety and well-being of seniors who live alone. The program has proven to be a positive one for both the clients and volunteers alike, offering seniors a respite from the isolation of living alone. There are clients in the program that have been receiving reassurance calls for over 10 years, and they continue to reap the benefits of the service.

The number of client in the Division's third volunteer service, the Money Management Program, has consistently



grown throughout the year, and continues to do so. This service allows seniors the financial independence to remain in the home of their choosing, and has done so since its inception in 2009. This year, a total of 78 seniors either participated in or were informed of the service provided by the Money Management Program.

Good Grief Center

On October 23, 2012, the Good Grief Center for Bereavement Support offered a one-day conference entitled, Business of Bereavement: Insights on Grief, at the Twentieth Century Club, in Pittsburgh's Oakland section.

This conference helped professionals and others build skills and gain a better understanding of grief and loss to have more meaningful conversations, provide greater support and a compassionate response to the needs of the dying and grieving among their patients, clients, employees, families and communities. The conference helped to promote the special awareness, needs and communications of the grieving and bereaved.

The Good Grief Center attracted a stellar roster of speakers and facilitators who assisted attendees in exploring numerous facets of grief. The conference was emceed by WTAE-TV news anchor and honorary GGC council member Sally Wiggin, and opened by the Honorable Corey O'Connor, City of Pittsburgh Councilman. Lulu Orr, founder of the Good Grief Center was honored for 10 years of service and recognized for a "Decade of Caring."

The major supporting partner for the conference was UPMC Health Plan. Additional partners included TIAA CREF, Dollar Bank, AseraCare Hospice and Smith Barney Morgan Stanley.

Annual FINANCIAL Report*

July 1, 2012 – June 30, 2013

INCOME

Public Guardianship**	\$500,000
Private Guardianship	
Fee for Service	223,033
Medical Assistance Fees	83,000
Protective Services	366,592
Service Coordination	
SLEP**	117,500
Marian Plaza	24,323
Volunteer Programs	
AARP Money Management**	36,000
Cart to Heart Shopping Program	13,407
Flu Shot	30,966
Good Grief Center	67,359
Administration***	82,695
TOTAL	\$1,544,875

EXPENSES

Public Guardianship**	\$528,690
Private Guardianship	
Fee for Service	204,899
Protective Services	382,550
Service Coordination	
SLEP**	117,437
Marian Plaza	25,093
Volunteer Programs	
AARP Money Management**	36,000
Cart to Heart Shopping Program	10,384
Flu Shot	30,966
Good Grief Center	254,744
Administration***	259,069
TOTAL	\$1,849,832

* audited figures

** Allegheny County Area Agency on Aging programs

*** \$102,000 of Administration income and expenses are included in the contract amounts of the Allegheny County Area Agency on Aging programs

Annual PROGRAM Report

July 1, 2012 – June 30, 2013

CORE PROGRAMS

Guardianship272 Wards

 Allegheny Public Guardianship (Includes Kane & Court Support) – 116 Wards

 Fee-for-Service Guardianship (Includes Trust Services) – 62 Wards

 Out of County (Includes Cambria Care Center) – 94 Wards

Protective Services.....617 Reports of Need

Service Coordination.....766 Residents Served

Volunteer Programs91 Consumers

 AARP—Money Management Program – 78 Clients

 Senior Reassurance Program – 7 Clients

 Volunteer Shopping Service – 6 Consumers

In-Home Flu Shot Program.....212 Consumers

Good Grief Center.....6,010 Consumers

 Training Activities

 On-Site Numbers — 49 Participants

 Off-Site Numbers — 757 Participants

 Call Report — 5,204 Consumers

Total Unduplicated Persons Served.....7,968 Consumers

OTHER SERVICES

Volunteers75 Volunteers

 Good Grief Center—23

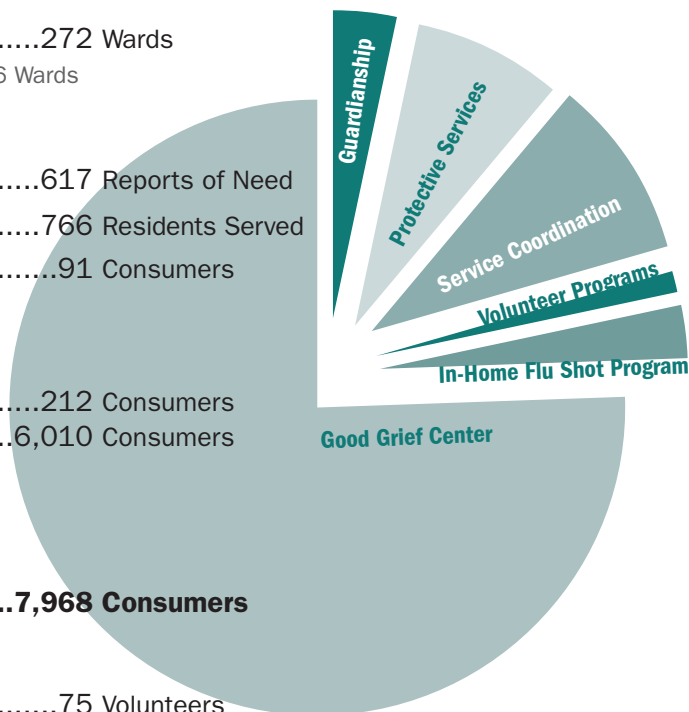
 Senior Reassurance—3

 Board of Directors—18

 Money Management Program—15

 Volunteer Shopping Service—6

 USS Staff—10



Board of **DIRECTORS** 2012 – 2013

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Strategy & Operations, Financial Management
Deloitte Consulting LLP

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Alison Wolfson

Project Coordinator
Allegheny County Court of Common Pleas

DIRECTORS EMERITI

Guy Tumolo

Retired
Controller's Office, Allegheny County

Ursuline

Senior Services

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www.ursulineseniorservices.org
www.goodgriefcenter.com

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Ursuline Senior Services was awarded this Seal of Excellence by the Pennsylvania

Association of Nonprofit Organizations (PANO), under the Standards for Excellence.

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Day of Giving 2014

This year, Ursuline Senior Services has once again been invited by the Pittsburgh Foundation to participate in the "Day of Giving," which gives donors a chance to increase their gifts by participating in a match pool.

This year Day of Giving will be held on May 6, in conjunction with the **Give Local America Initiative**, a nationwide celebration of philanthropy. This event will run from 6 am to 12 am (midnight.) On that day, anyone wishing to support Ursuline and its programs, including the Good Grief Center, should visit www.pittsburghgives.org, where there will be a form available on the site where you can input information and select our organization from a drop-down list.

Organizations will receive a prorated portion of the match fund. Due to the high volume of participation in prior years, the cap introduced last year will remain in place limiting eligibility for matching funds to the first \$1,000 contributed by any donor to an individual organization. Of course, you can make as large a gift as your means allow and we will appreciate any amount you pledge to us. Donations are MasterCard/Visa credit card gifts only.

Please note that we are given to understand that, due to anticipated changes in the Pittsburgh Gives Day of Giving program, this may be the last time Ursuline Senior Services/Good Grief Center will be able to participate in this unique community fundraiser! At the peak of our participation in this event, Ursuline and its Good Grief Center realized nearly \$7000 in combined gifts and matching funds. Since this may be our last opportunity to receive such funds through this fundraising event, **we are challenging all of our long-time friends and new supporters to help us surpass this number one more time to help us continue to support and provide vital services to our neighbors in need!** If only 100 donors gave at least \$75 each through the May 6 Day of Giving, we could meet and exceed our best year to date.

Won't you help us achieve this important goal this year? Please consider supporting Ursuline Senior Services and all the people we serve on the Day of Giving, May 6, and help stretch your contribution. Your generosity, as always, will be most appreciated.