



2017 ANNUAL REPORT

By

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2017 Statistics

Narrative Reports

Success Stories

Union County Guardianship Services provides guardians for adults who have been deemed incompetent by the court, and who do not have family or friends to fulfill this role.

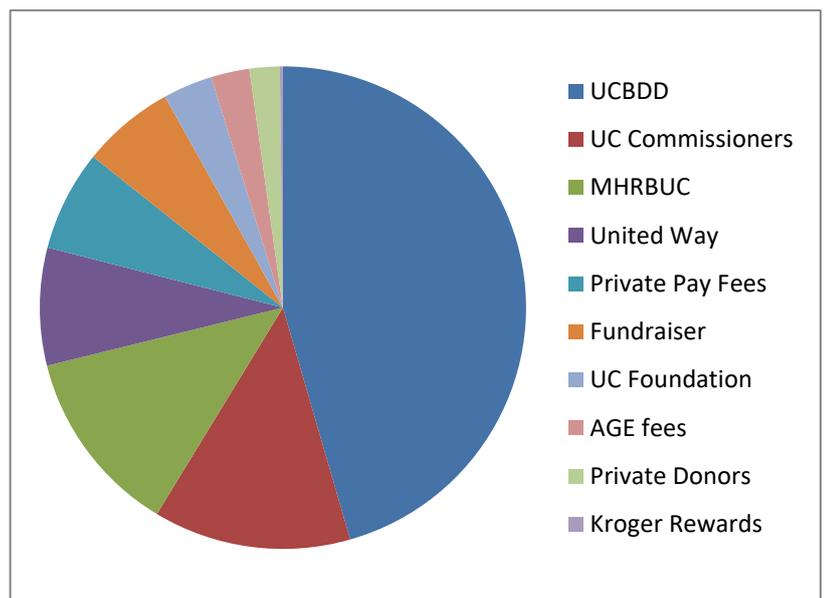
STATISTICAL OVERVIEW

	2017	2016	2015
Total wards	20	18	16
UCBDD	15	11	10
Seniors	3	4	3
Mental Health	3	3	3
Active 12/31	15	15	11
Non-guardian cases	3	1	3
Client-months	194	189	143
UCBDD	129	110	105
Seniors	33	43	28
Mental health	32	36	10
Total hours	1296	1459	1193
UCBDD	665	706	889
Seniors	338	345	216
Mental Health	253	408	88
Cost/Hour	\$45.39	\$48.11	\$57.07
Average hrs/mo/ward			
UCBDD	5.15	6.42	7.75
Seniors	8	8	7.7
Mental Health	10.5	10.5	8.8

Client-Source	Client-Months	2017 Total Hours	Cost (including mileage)	Payment	% Caseload	% Income	Over/Underfunded
UCBDD	129	665	\$32,099.35	\$34,647.00	66.50%	47.00%	-\$2,547.65
Seniors	33	338	\$16,179.82	\$10,362.50	17.00%	13.93%	\$5,817.32
Mental Health	32	253	\$11,983.67	\$11,985.00	16.50%	16.10%	-\$1.33
TOTALS	194	1256					

Notes: Senior payment= \$10,000 from UC Commissioners + 1 private-pay senior at 90% discount per sliding scale
 Mental Health payment= \$5000 grant from MHRBUC + 1 client at 60% discount+ special payment from MHRB

Funding Source		% income
UCBDD	\$34,647.00	47
UC Commissioners	\$10,000.00	13
MHRBUC	\$9,476.00	13
United Way	\$6,000.00	8
Private Pay Fees	\$5,128.00	7
Fundraiser	\$4,710.00	6
UC Foundation	\$2,500.00	3.3
AGE fees	\$1,953.00	2.6
Private Donors	\$1,528.00	2
Kroger Rewards	\$152.00	0.2



NARRATIVE REPORT

FUNDING AND CASELOAD

As seen in the statistical reports on the previous page, since 2015 this agency's caseload has increased approximately 35% while the cost per hour of providing services has decreased approximately 20%. We have taken steps to work more efficiently while not sacrificing effectiveness in caring for our wards.

The 2017 caseload includes 5 new clients and one client returning after a period of living in another county. We dropped one client due to a move to another county, two clients due to family members becoming guardians, and two clients were short-term emergency guardianships which expired when the emergency was resolved. As of 12/31/17 we have 14 active guardianships with one new case scheduled for hearing January 31, and one additional case in the early application stage.

The UCBDD continues to "pay as they go" with our current fee-for-service agreement. In addition to direct guardianships, our agency collaborates with UCBDD in training events such as "Guardianship 101", an overview of guardianship to parents who have children with disabilities who are approaching their 18th birthday to help those parents determine whether guardianship is the appropriate avenue to pursue for their child. UCBDD staff members are invited to attend relevant Adult Guardianship Education classes at no charge. The Executive Director provides consultation and guidance to UCBDD staff in questions of guardianship, including mediation in cases where UCBDD personnel feel a guardian is restricting the rights of their ward inappropriately.

We are grateful that the Mental Health and Recovery Board was able to provide payment for a client whose needs during a recent crisis would have presented a severe challenge to our resources. MHRBUC also increased the amount of the grant they have historically awarded our agency. We also appreciate their provision of rent-free office and meeting space. These in-kind gifts are crucial to our financial stability.

We were dismayed to learn that our 2018 grant application to Senior Services was denied, apparently due to the small number of senior wards currently on our caseload. However, the Executive Director has met with Senior Services representatives to clarify that our role in assisting seniors goes beyond those under direct guardianship as we provide training and support to guardians who are themselves seniors through our Adult Guardianship Education program. Efforts will continue to educate Senior Services on the scope of our programming and explore avenues of mutual support.

At the request of the court, we are providing supervision for visits and/or family mediation in scheduling visits with two individuals residing in local assisted living facilities. These are both billed on a private-pay basis.

23% of our funding comes from agency support such as the United Way, Union County Foundation, and our unique "Uptown Food Crawl" fundraiser. This funding helps cover operational expenses not billable to an individual as well as making up the funding shortfall for seniors and mental health clients who do not have a direct funding source.

STAFFING

Linda Fisher is entering her fourth year as executive director and has a personal caseload of 3 wards. Melinda Stice and Sharon McFarlane continue to enjoy "semi-retirement" with just one client each. Kathy Jamison has six wards, and Shianne Niles continues to grow in her role with four current wards and one pending appointment January 31. One new hire in 2017 resigned within a month of hire because the work was more time-consuming than he anticipated due to the particular challenges of the case. I anticipate hiring one additional staff guardian in the near future to have trained "in reserve" for upcoming cases.

ADULT GUARDIAN EDUCATION

Three sessions of the 6 hour "Fundamentals of Adult Guardianship" were scheduled, with the February session being cancelled due to lack of registrations. A total of 18 new guardians were trained in the remaining two classes. Three sessions of 3 hour continuing education classes were also scheduled, with the November session cancelled due to lack of registrations. Twenty-eight individuals attended "Guardianship and Developmental Disabilities" and 41 attended the locally-produced session on hospitalizations. The hospitalization session provided a wonderful opportunity to network with the local hospital, mental health providers and first responders and resulted in improved communication and understanding of each agency's role and responsibilities when dealing with adults under guardianship.

OUR SUCCESSES

- The mother of a 24 year old man with developmental disabilities had been serving as his guardian. She kept him isolated and was suspected of using medications to keep him sedated. When the man she was living with died of an opiate overdose, with the young man and his younger sister present in the home at the time, both he and the sister were removed from the mother's care. A guardian from our agency was appointed as his emergency guardian for the duration of the investigation of the mother. The guardian was able to obtain medical care for the young man, including reducing his medications so that he was alert and active, and control of his diabetes which had not been appropriately managed. The guardian worked with the UCBDD to identify a family member who was a willing and suitable guardian. Upon the conclusion of the investigation finding the mother to be unfit to serve as guardian, the guardianship was transferred to the family member. The young man is now happily living in the home of the family guardian, along with his sister. He participates in a day program and enjoys outings with his family.
- A 43 year old man with chronic mental health challenges returned to our community after a lengthy mental health hospitalization. He had previously been a client of our agency, and upon learning he was returning to the community, arrangements were made with the court to resume guardianship for him. This provided continuity of care as our agency is familiar with his history. The current guardian worked closely with a team from Maryhaven and the Mental Health and Recovery Board to put supports in place in hopes of making it possible for this individual to live successfully and independently in the community. When the client demonstrated by his behaviors that he was unable to maintain himself safely in the community, the guardian facilitated his admission to a behavioral health facility and continues to monitor his care and progress there.
- The elderly grandparents of a 24 year old woman were not able to continue serving as guardians due to their age and physical decline, and living at a distance. No other family members were available to step in. Guardianship has been accepted by a young member of our staff, providing this young woman with a role model and friend as well as the person looking out for her health and best interests.
- The Union County Board of Developmental Disabilities has made five referrals to us this year to take guardianship of individuals in their system who do not have appropriate family or friends to serve. In another case, our agency was asked to act as mediator in resolving conflict between the guardian and a caregiver.

In every case, our goal is to maximize the quality of life of the individuals we serve. We work in close cooperation and collaboration with the Probate Court and community agencies such as Senior Services, the Board of Developmental Disabilities, and the Mental Health and Recovery Board.