



2020 ANNUAL REPORT

By

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NARRATIVE REPORT

FUNDING AND CASELOAD

UNPRECEDENTED is the word that has been used so much in 2020 that it has nearly lost its impact, but unprecedented is truly the best description of the challenges we have faced—and prevailed against—in 2020.

At the beginning of the year we had some attrition from wards moving away, a death, and a ward being restored to competency. It looked like our caseload would reach an all-time low. Then referrals began to flood in, and by the end of the year we had screened 15 referrals with nine becoming wards and two still on the pending list. We finished the year with 20 active cases and two referrals pending. In the course of the year we cared for 30 individuals, an all-time record number.

Serving our wards in the era of COVID has required our staff to be flexible and creative. Limited visitation and personal contact have resulted in fewer hours of service, but we have been diligent in ensuring that all of our wards are in safe environments and have their needs met despite the limitations imposed by the pandemic conditions. The office computer was upgraded to enhance audio/visual capacity for virtual meetings, and all staff have become proficient in various virtual platforms for meetings and court hearings. We also upgraded to Google's G-Suite for Non-Profits and as the year ended were making the transition to new email accounts with the more professional "@ucvcp.org" domain. G-Suite will enable better on-line secure document sharing which will be important as we move forward.

The charts on the following page provide a statistical snap-shot. Roughly 77% of our expenses are covered by payments by individuals or agencies on behalf of individuals, up from about 66% last year. The remaining funds come from community organizations, individual donors and our private fund-raising efforts.

Although we were not able to hold our annual Uptown Food Crawl fundraiser, several of our former sponsors, as well as a couple of new ones, made donations. We are exploring new approaches in hopes of holding some version of the Food Crawl in 2021. We are grateful to have finished the year in a strong financial position, but we anticipate shortfalls in what our traditional funders are able to provide in 2021 and are planning our budget accordingly.

STAFFING

Executive Director Linda Fisher has two current permanent wards in addition to her administrative responsibilities. She has also held two emergency guardianships this year to take care of immediate needs while waiting for hearings to appoint permanent guardians from our staff.

Kathy Jamison and Tracey Monroe have both done a wonderful job of taking on new clients under the difficult pandemic limitations, including some very challenging cases. They each now have eight wards.

Sharon McFarlane continues on a semi-retired basis with two cases.

BOARD MEMBERSHIP

Since the founding of this agency in 2011 it has enjoyed a fairly stable Board of Trustees. Over the past two years, some natural attrition has led to the recruitment and election of six new Board members. Each one brings a unique set of skills and experiences that make them excellent additions to our team. We are excited to have fresh eyes and energy come alongside our faithful veteran members as we build for the future.

ADULT GUARDIAN EDUCATION

Our Adult Guardian Education program was yet another victim of the pandemic. In-person classes had to be cancelled. We notified participants, refunded registration fees, and helped those who needed assistance to access the on-line education provided through the Judicial College of the Supreme Court of Ohio. We are hopeful that by the end of 2021 we will be able to hold an in-person, locally produced class on "Communicating with the Court" with the collaboration of our newly elected Probate Court Judge Rick Rodger.

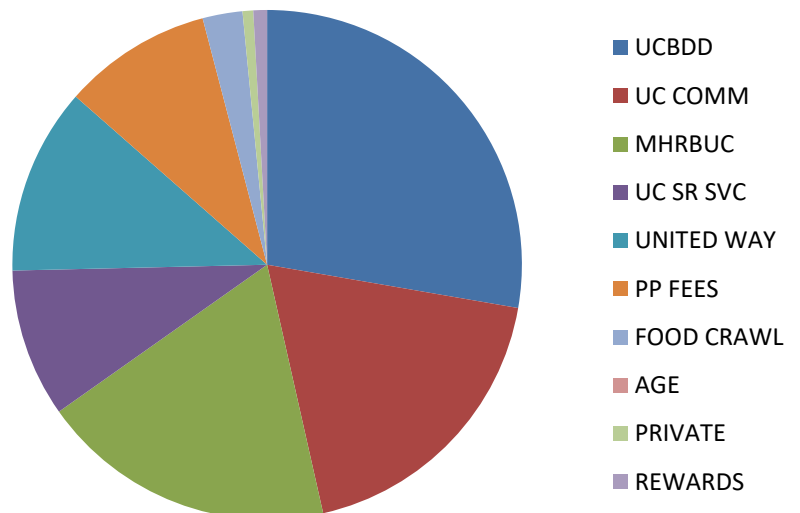
Union County Guardianship Services provides guardians for adults who have been deemed incompetent by the court, and who do not have family or friends to fulfill this role.

STATISTICAL OVERVIEW

| | 2020 | 2019 | 2018 | 2017 | 2016 | 2015 |
|------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Total wards | 30 | 22 | 19 | 20 | 18 | 16 |
| UCBDD | 16 | 12 | 12 | 15 | 11 | 10 |
| Seniors | 9 | 4 | 3 | 3 | 4 | 3 |
| Mental Health | 5 | 6 | 4 | 3 | 3 | 3 |
| Active 12/31 | 20 | 19 | 17 | 15 | 15 | 11 |
| Non-guardian cases | 0 | 1 | 2 | 3 | 1 | 3 |
| Client-months | 238 | 231 | 215 | 194 | 189 | 143 |
| UCBDD | 133 | 129 | 124 | 129 | 110 | 105 |
| Seniors | 43 | 39 | 30 | 33 | 43 | 28 |
| Mental health | 52 | 55 | 48 | 32 | 36 | 10 |
| Non-guardian | 0 | 8 | 13 | | | |
| Total hours | 795.5 | 1100 | 1230 | 1296 | 1459 | 1193 |
| UCBDD | 318.25 | 499 | 534 | 665 | 706 | 889 |
| Seniors | 342 | 414 | 398 | 338 | 345 | 216 |
| Mental Health | 135.25 | 141 | 230 | 253 | 408 | 88 |
| Non-guardian | 0 | 46 | 68 | | | |
| Cost/Hour | \$56.47 | \$52.88 | \$50.61 | \$45.39 | \$48.11 | \$57.07 |
| Ave.hrs/mo/ward | | | | | | |
| UCBDD | 2.4 | 3.8 | 4.3 | 5.15 | 6.42 | 7.75 |
| Seniors | 6.5 | 10.6 | 13.2 | 8 | 8 | 7.7 |
| Mental Health | 2.6 | 2.6 | 4.8 | 10.5 | 10.5 | 8.8 |
| Non-guardian | 0 | 5.75 | 5.2 | - | - | - |

| Client-Source | Client-Months | 2020 Total Hours | Cost | Payment | % Caseload (hours) | % Income |
|--------------------|---------------|------------------|-----------------|-----------------|--------------------|----------|
| UCBDD (16) | 133 | 318.25 | \$17,972 | \$14,782 | 58% | 40% |
| Seniors* (9) | 43 | 342 | \$19,313 | \$9,920 | 21% | 22% |
| Mental Health**(5) | 52 | 135.25 | \$7,638 | \$10,160 | 22% | 22% |
| TOTALS | 228 | 795.5 | \$44,922 | \$34,862 | | |

| | |
|------------|--------------|
| UCBDD | \$ 14,782.00 |
| UC COMM | \$ 10,000.00 |
| MHRBUC | \$ 10,000.00 |
| UC SR SVC | \$ 5,021.25 |
| UNITED WAY | \$ 6,312.62 |
| PP FEES | \$ 5,040.32 |
| FOOD CRAWL | \$ 1,350.00 |
| AGE | \$ - |
| PRIVATE | \$ 360.41 |
| REWARDS | \$ 463.34 |



OUR SUCCESSES

In every case, our goal is to optimize 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. We appreciate the generosity and compassion of these agencies and our community at large as we seek to protect the rights and best interests of these who cannot protect themselves.

- A 76 year old veteran with Parkinson's disease was admitted to a nursing home. His step-granddaughter from sent her boyfriend to get the man with intention of taking him to their home in another state. Due to suspicions that their intent was to exploit this individual for his money and medications, the nursing home was not willing to release the resident to the boyfriend. The boyfriend and an accomplice broke a glass door at the nursing home and forcibly removed the man. When they were detained by police, our agency was notified and an emergency guardianship established for the man's protection. A permanent guardianship with our agency was subsequently determined to be appropriate and criminal charges are pending against the couple.
- One of our clients with severe mental illness had been living with a family member in a hoarding situation. The family member married and moved out, leaving the very limited individual alone. Due to our good relationship with local law enforcement, when the police discovered the woman alone we were notified and arrangements were made for admission to a long term care facility where the woman's needs are now being met in a much more appropriate way.
- A 77 year old man had been living with his dog in his car, and the car was repossessed leaving him with no shelter in cold weather. The local police notified Adult Protective Services when it became apparent the individual was unable to make arrangements for suitable shelter due to his diminished mental capacity. Adult Protective Services in turn notified our agency, and an emergency guardianship was established. Our agency worked with Senior Services and the Mental Health and Recovery Board to provide temporary housing in a motel and food while working to arrange permanent housing, engaging a variety of social service agencies. A permanent guardianship with our agency is pending.
- A 71 year old man had been living independently and handling his own finances without difficulty when he had a sudden onset of mental and physical issues leading to repeated hospitalizations. When it became evident that he would not be able to successfully return to independent living at his apartment and that he had no family willing to help make arrangements for him, the hospital social worker contacted our agency. He was admitted to a local nursing home with a guardian from our agency where he is quite content.
- A 19 year old young woman with intellectual disabilities and mental health issues was under the custody of children's protective services but no longer wanted to attend school. She requested emancipation from children's services and that agency contacted us to take the "hand off" as she most definitely cannot arrange for her own care and safety. Our staff guardian is working with the Board of Developmental Disabilities, her provider and various social service agencies to put benefits and supports in place.
- A 32 year old woman with intellectual disabilities and mental health issues was under guardianship with her mother serving as guardian when the mother passed away. Her father became her guardian but had requested help from our agency due to conflicts with the daughter. The woman requested one of our staff guardians by name since she knew that guardian from her time working for the UCBDD. During the intake process, her father unexpectedly and suddenly passed away. The guardian is working closely with the service consultant to put supports in place for this individual as she grieves the loss of both parents.
- A 21 year old man with developmental disabilities had been active during his high school years, holding a job and participating in extra-curricular activities. Since graduating from high school, he was isolated at home largely due to the fact that his mother has no transportation and little motivation to arrange for him to go places and do things. The service consultant at UCBDD became concerned about this young man's quality of life and appealed to the Probate Court. The Court asked our agency to become involved in "coaching" the mother regarding facilitating opportunities for her son. When it became apparent that the mother was not willing or able to made the needed adjustments, our agency stepped in to take over the guardianship. The young man is now receiving job coaching, is excited about returning to work, and looking forward to participating in Special Olympics.

Each of these stories may well have had a very different ending without the involvement of Union County Guardianship Services.