

AGENCY SITE VISIT

PROCUREMENT AND MONITORING COMMITTEE

Agency: Addus HeathCare

Date of visit: 12/17/2010

Surveyors: Angela Phinney, SDS, Cathy Steadman Cox, volunteer

Agency Representative: Heather Hall, Agency Director

1. **Agency Personal Care Aides:** insure that Agency has qualified and trained employees sufficient in number to meet the needs of the Clients receiving services – **Satisfactory**
 - a. Note: OPI Client to Caregiver ratio of 61.9% (ratio should be at least 50%)
 - i. OPI Clients=57, Addus Care Aides=92
2. **Agency Personal Care Aides:** insure that all Aides be in compliance with DHS & SDS Criminal History Clearance Administration Rules 410-007-0220 through 411-007-0380, and have sufficient communication and language skills to enable them to perform their duties as required – **Satisfactory**
 - a. Note: Agency recruits Chinese and Spanish speaking Care Aides for Clients needing this service
 - b. Agency resubmits Care Aide's criminal history every two years.
3. **Agency Personal Care Aides:** insure all Agency Personal Care Aides will have completed orientation as required by the SDS agreement - **Satisfactory**
4. **Agency Personal Care Aides:** supervisory visits of Aides – **Needs Improvement**
 - a. Four Client records viewed (Clients identified as A.S., M.L., P.R. % W.P.) – three Client's records show supervisory visits conducted every 90 days as per State of Oregon requirements
 - i. Client A.S. continued to receive personal care services while aide supervisory visit needed for 07/2010 was omitted and supervisory visit needed for 01/2010 was 14 days late
 - ii. Supervisory visit of 02/25/08 for Client P.R. was completed but documented on client progress report, not on the supervisory visit form.
 - iii. Charts of clients M.L. & W.P. show supervisory visits conducted and documented correctly.
5. **Client Services:** provide authorized services for all Clients referred by SDS RVCOG – **Satisfactory**
 - a. Four Clients charts reviewed – all found to be satisfactory.
6. **Client services:** promptly assign and begin services as indicated per SDS agreement – **Satisfactory**
 - a. Four Clients charts reviewed – all found to be satisfactory

7. **Client Services:** reassess the Client at least quarterly or within one week following emergency treatment. And revise the Client's service plan as changes occur - **Needs Improvement**
 - a. Clients A.S. - not satisfactory – see above 2. I
 - b. Clients M.L. & W.P. - satisfactory
8. **Client Services:** conduct an initial screening in the Client's home as stated in SDS agreement – **Satisfactory**
 - a. Four Clients charts reviewed – all found to be satisfactory.
9. **Client Services:** maintain Client case files as required by SDS agreement – **Satisfactory**
 - a. Four Clients charts reviewed – all found to be satisfactory.
10. **Client Services:** establish Client care disaster plan - **Satisfactory**

Site visit for the Money management Program

Present for the program review:

Carol Cookson, director of the Oregon Money Management Program

Gloria, volunteer

Sharon, volunteer

Martin, volunteer

Clay, program coordinator

Sue and Angela representing SSD

Carol does her annual review concurrently with the ssd contract review.

Carol discussed the process and shared a new brochure. There are currently 47 volunteers and 45 clients participating in the program. Of the 45 clients, 30 are in the bill payer program and 15 are in the representative payee program.

AARP developed the program and provides a data base which includes case notes on each client, their situation, brief personal data such as animals, smoking. Changes or problems will be in the case notes. Data base includes info on volunteers such as their preferences, geographic area limits. Changes of volunteer will be the latest note on the top. This data base has been in place for 8 years. Fields are being added to make the data collection simpler.

There are spread sheets with weekly updates of who is matched, with whom and their addresses and phone numbers. Carol is available to consult with Clay when there are issues and Clay is available 24/7 to his volunteers.

There is a letter of agreement between AARP of Oregon and SSD. AARP provides liability protection for volunteers, clients and SSD. Easter Seals provides state-wide coordination and supervision for the program. (Carol) There is also a small program that Carol manages without any AARP involvement. It is called money coach and is for short term service only.

The Money Management Program has an advisory council. Clay reports that they meet 2 to 3 times per year and that they can assist the volunteers. Clay reports that he has difficulty with the case managers at times. They do not know the difference between the bill payer program and the representative payee program. He feels that they need to do a more in depth assessment prior to making the referral to the program. The bill payee agreement should accompany the referral. The difference between the two

programs is the capacity of the client to understand their financial situation. Lack of capacity combined with a doctor statement is needed for the rep. payee program. Clay and the money management program are supported very well by the Umpqua Bank. They provide space and office equipment and supplies. The space is very nice and large. Clay requests a letter of thanks to Umpqua Bank.

Clay provided a written report describing the components of the program which is very complete. It is attached to this report. It follows the outline of the review process which was provided by Carol. This was a very thorough review which included case reviews, documentation of activities. I was impressed with the review process. Overall, the program seems extremely well run. A potential problem is the loss of an important volunteer. This volunteer, Martin, is leaving the area in April. At this time his job is monitor the bank statements of the participants and to follow up on red flag. Clay will need to find a replacement who has the dedication and capabilities of this man; not an easy job.

I was shocked to learn that Clay, who keeps this all afloat, is basically unpaid except for a small stipend to meet expenses of doing business. This is such a sensitive position since it deals with money and the coordinator has such a lot of responsibility, it seems that they should be compensated. There is no doubt in my mind that this is a very important program and it is being well run at this time. This reviewer did not stay for the case reviews.

Monitoring visit for the Caregiver Support and Training Contract

On 10/4/10, Angela and Sue visited the Kauffman Center site to observe a caregiver training. The speaker of the day was Brenda Lauhhunn, the Hospice Manager for Cascade Health Solutions. She was a dynamic speaker and provided information that the participants indicated was helpful. There was a low turnout for this event. There were only 4 participants in addition to Angela and Sue. The facilitator described hospice services, encouraged the caregivers to take care of themselves and generated a lively discussion.

On 10/5/10, Angela and Sue visited the Kauffman Center again to participate in a support group of 8 participants who made it clear that they depended on the support group for information, to buoy them up when they are sad and to prod them gently to take care of themselves. We were told that there are three separate support groups each with its own "personality" and one of the participants we observed commented that she had tried a couple of groups and felt most comfortable in the group we attended. Some of the participants were caring for their person at home, others had placed their person and still others were still attending for support after the death of their person. It was clear that the support groups offered an important service.

After the support group, Angela and Sue met privately with Diana Jacoby, the new administrator of the Caregiver Support and Training Contract. She has taken over this role at a time when Cascade Health Solutions is making major changes. CHS will no longer be offering respite services for caregivers and the Kauffman Center will no longer be the site for the contract services. Ms. Jacoby is currently searching for a new site, possibly a church, where costs can be kept minimal. She is also updating records to be in compliance with the contract. The support group participants and training participants primarily come from referrals from the Alzheimers Association and word-of-mouth from the participants themselves. The participants meet the eligibility criteria for the contract. The contract administrator arranges for special speakers, approximately 9 per year, to meet the expressed needs of the support group participants. Also, not related to the contract but useful to the participants, Cascade Solutions co-sponsors with Elder Help and Living and the Alzheimers Association a ten-week series on memory loss.

It is concerning that respite will no longer be available to support group members. It is hoped that this will not hinder participation in the support groups or the trainings. Per Ms. Jacoby, this was an underutilized service. In the support group we attended, only one person had their person in respite while she attended.

It is interesting to note that the contract serves the outlying areas of Junction City, Veneta, Pleasant Hill, Oakridge and Cottage Grove through specialized trainings.

Angela reviewed the records and discussed the units of service that are reported for the contract and discussed setting up a process for documenting and following up on caregiver complaints.

Overall, it appears that the contract is being followed as best as it can be through this period of transition with its sponsor, Cascade Health Solutions.

Site Monitoring Visit

Senior Law

Date: December 21, 2010

Time: 11:00-12:00

Location: Lane County Legal Aide

Monitoring Visit By: Angela Phinney

Attendees: Jean Beachdel & Steve Skipton

Jean Beachdel oversees the program and sets the priority for cases. Steve Skipton is the lead attorney. Volunteers are used extensively in the program. Volunteers include interns and local attorneys. We discussed the need for criminal record checks, and agreed as members of the bar, attorneys were excluded from doing background checks. I did advise them that S&DS could do their background checks for other volunteers as needed.

Senior Law has a large pool of expert advice to pool from in the community. They are working on getting more volunteer attorneys in the rural areas, but expressed some difficulty. They provide a variety of legal services, including, but not limited to: public law, housing rights, long term health care rights, guardianship defense, and elder abuse. They keep thorough documentation on their cases and the types of cases they assist with. Cases are assigned based on greatest need. Jean is in charge of prioritizing cases. They do not turn clients away based on their ability to pay, ethnic or social background. Donations are always accepted.

Senior Law also offers legal education opportunities to the community. They have an upcoming training seminar on Tenant Rights. They post the event flyers in senior centers to get the word out. I recommended that they notify S&DS of upcoming educational events to further their outreach.

They showed knowledge about their program and their responsibilities within the community as both a partner with S&DS and to further their mission within the community. Their documentation was organized and provided comprehensive information.

Site Monitoring Visit

LTC Ombudsman Support Meeting

Date: January 13, 2011

Time: 1:30-3:30

Location: The Tate Condominium Building

Monitoring Visit By: Angela Phinney

Attendees: Diane Bishop, Gretchen Jordan, ~24 volunteers

This was a volunteer appreciation event to honor the Ombudsman volunteers. The meeting was led by Diane Bishop and was attended by 24 volunteers. About half of those in attendance were new recruits. The turnout was wonderful and the volunteers were enthusiastic about the LTC Ombudsman Program.

The meeting started with refreshments and gave volunteers a chance to network with other Ombudsmen. I spoke with a few of the volunteers and they were all very satisfied with the program. One volunteer came to the program after being a child advocate for the Child's Advocacy center. She wanted to be an Ombudsman because she saw a real need in the community. Everyone wants to help children, but she feels more people need to pay attention to the needs of seniors.

Introductions followed and everyone was asked to state how long they have been in the program, why they volunteer, and in what way their perspectives have changed since they first entered the program. While there were many positive things said, a few stood out in my mind:

“(LTC Ombudsman) Purest sense of advocacy I have ever witnessed.”

“I have done a lot of good things in my life, but volunteering here makes my life feel complete”

Most volunteers agreed they loved working directly with the seniors, but wished there was not so much paperwork involved. It was also stated how important it was to get along with the administrator.

“The facility I volunteer at is on its 8th director. New directors have looked to me to get a sense of what is going on in the facility.”

I was left with the sense that the LTC Ombudsman program not only helped seniors, but worked in partnership with the LTC facilities.

There was a motivational speaker, Leigh Anne Jasheway (The Accidental Comic) that talked through the use of humor, on overcoming stress. She was a very effective speaker, and seemed to capture the attention of her audience.

Gretchen Jordan, state volunteer coordinator, passed out awards to the volunteers. Every volunteer was recognized in some way.

I attended the "Elder Help" holiday potluck event at Willamalane Senior Center as a way of monitoring and evaluating the services provided and success of the program.

Last year I was involved in a meeting with Carol Ford who was new to the role of volunteer training, support and services. I also met a couple of volunteers and seniors involved with the program at that time. Everyone I spoke with was very positive about the services. It not only seemed like a great program but that it was a program that could grow in the numbers served and volunteers involved once Carol had been on board a while. Carol was very enthusiastic and involved at that time.

When I arrived at the center this year I was able to observe seniors with their volunteers arriving in the parking lot. This in its self spoke a lot about the relationships of the individuals involved. The amount of compassion and caring was amazing as I watched groups arrive and prepare to enter the building. Walkers and canes were everywhere and elders helped from cars with great animation and patience. It was obvious that those I observed had established a solid, caring relationship with each other.

Upon enter the "party area" I was greeted by Senior Connection staff that was enthusiastic and involved. There were great holiday decorations, music, table settings and food for approximately 50 participants. I was able to talk one on one with Carol briefly and she informed me that the number of volunteers and seniors involved is down at this time to around 30 pairs and that it seems to fluctuate greatly at times. [It had been in the high 40's last year and growing.] I asked about a waiting list for seniors and she told me there really isn't one at this time, although last year I seem to remember there had been a substantial wait for seniors to get paired with volunteers. She has just finished a volunteer training last week with 3 participants.

I sat with 2 pairs of seniors and their volunteers although I visited with many more and heard only positive remarks such as "I don't know what I'd do with out her visits", "She is the best thing that has ever happened to me", "I enjoy her so much" "I couldn't stay in my house with out her" from the seniors. From the volunteers things were equally positive. They felt that they had a real relationship with their elder and that they had gained more meaning to their life from their contact with them. They loved the stories and time spent and felt they had learned a lot. The 5 volunteers that I talked to had been involved from 6 months to more then 5 yrs and all basically felt the same.

The matches of volunteers to seniors seemed really well done. When I talked with a Senior Connection staff person from a rural area he told me that it was his job to provide detailed information [through an intake form] on seniors in his area that he felt were good candidates for the program so that appropriate matches could be made with volunteers. He discussed how he came across seniors in his community who were in need of services by just being involved and well known in the town. People would find him to tell him about a senior neighbor or friend that was having

problems and could use a companion. He told me that he had at least 2 persons waiting for volunteers at this time.

One volunteer did talk about the training program and how very helpful it was especially the section on boundary setting. She had been involved years ago with the program and then had been gone for a year. When she returned to the program training was offered, [she hadn't had training the first time]. The section on "boundary setting was new information for her. She told me about her previous senior she had and that boundaries had really been an issue at the end of the relationship so she was really happy to have a better understanding right up front so this would not become an issue again with her new senior. She described Carol as being a great trainer with a lot of good information.

In conclusion I feel that the Elder Help program is providing a really valuable and cost effective service to seniors trying to remain in their homes. Many hours of service are provided freely by committed and compassionate volunteers that not only give freely of themselves but also gain so much from their relationship with their senior clients including knowledge that may help them prepare for their future "senior years".