

Innovative Supports & Alternatives



Presented by: Virginia Hammerle &
Courtney Carey

Objectives

- Define the Need
- Identifying Alternatives
- Describe the Barriers
- Explore Services and Supports Offered
- Program Overview

Courtney Carey

Courtney Carey is a Texas Certified Guardian, with over 20 years' experience in guardianship services, case management, crisis services, and continuity of care. She has worked in both the public and private sector providing services and supports to those in need throughout North Texas. She now works at Hammerle Finley Law Firm where she developed the North Texas Guardianship Services, LLC, and provides guardianship services as well as social services at the firm.

She has a bachelor's degree in Social Work from Tarleton State University, and a Master of Science with a degree in Long Term Care, Senior Housing, and Aging Services from the University of North Texas. Courtney has been a member of the TGA since 2015 and is currently serving as Secretary on the Board of Directors.



Timothy Wilson



Tim is a veteran of the U.S. Air Force where he served as a telecommunications technician. After Air Force service Tim gained 25 years' experience working for national and regional telecommunications companies in engineering, operations, business development, and executive leadership roles. Tim's broad business experience has afforded the opportunity to solve a myriad of complex financial, business, and technical problems which Tim incorporates into his practice of law to better serve the diverse needs of his clients.

Tim attended law school at UNT Dallas College of Law where he served on several boards including treasurer of the Asian Pacific Law Student's Association and of the Veterans Law Student Association. His practice centers on estate planning, probate, guardianship, and business law.

The Need

- The Texas Legislature mandated that alternatives to guardianship and supports and services be considered prior to creating a guardianship.
- Everyone has different needs. Any variation or combination of services that are employed to curb the need for a guardianship is an alternative.
- There is a lack of, or inconsistent, supports and services across the State of Texas.

The Potential Client Base

31 Million Texans

- 5 million are Baby Boomers
- 3 ½ million have at least on disability.
 - Those numbers do not include individuals in an institution such as State Supported Living Centers (SSLC) or other Intermittent Care Facilities (ICF).

Identifying the Need

Our Attorneys identified the following needs/questions among our existing client base:

- Implementing Ancillary Documents
 - Durable (Financial) Power of Attorney
 - Medical Power of Attorney
 - HIPAA Release
 - Directive to Physicians
- Identifying appropriate housing
- Dealing with the onset of dementia

Identifying the Need

Our Attorneys identified the following needs/questions among our existing client base:

- Facilitating the next step with an elder
 - Driving
 - Moving to a facility
 - Family conflict
- Protecting an elder from exploitation
- Self – Neglect
- APS Reporting
- Finding an agent to serve for a client without family/friend support

Alternatives to Guardianship

Sometimes just one person in an individual life can make a difference.

- Case Manager
- Power of Attorney
- Representative Payee
- Supported Decision Making Agreement
- Durable Power of Attorney
- Person-Centered Decision Making Agreement

All of these require that the individual in need has someone to act and support them.

Identifying Alternatives

House Bill 39 implemented alternatives to guardianship to include:

- Advance Directives
- Power of Attorney
- Financial Planning and Management
- Community Administrator
- Supported Decision Making
- Surrogate Decision Making (setting appropriate)



Barriers

to Services/Supports

Not everyone has someone!

Age
Abandonment.
Addiction.
Location, Location, Location

Sometimes, no one is better than someone!

Family may be the problem.
Friends/neighbors don't always have good intentions.



Practice Areas:

Estate Planning

Probate

Guardianship

Real Estate

Business Law

Elder Law

Litigation

Primary Counties Served

Denton

Collin

Tarrant

Dallas

Wise

Supports/Services in a Law Firm

- What are supports and service?
- How do we find them?
- Who identifies what they are?
- How do they get set up?
- Who ensures there is follow through?

Social Services/Evaluation

- Home Visit-structure, hazards, needs, areas of improvement
- Listen-What do they say they need, what are they not saying
- Understand-Listen to understand the situation, needs, barriers.
- Research-Based on Home visit research services and supports that could help them. Call if needed. Our firms serves many counties.

Social Services/Evaluation

- Compose-Put the information in one easy to read report that has numbers and information to help them get the assistance they need.
- Present-Go over the report with the individual and their family. Answer any questions they may have.
- Assist- Follow up in a way that is directed by the original client. Meaning call to set up services should the need arise.

Services Provided

- Guardianship-3rd party private professional guardian
- Case Management –short or long term
- Referral – to assist family or client
- Home Visit – evaluate environment and make recommendations for aging in place options.
- Less Restrictive Alternative – filling in the gap to prevent full guardianship and support the individual
- Expert Witness – evaluate situation when there is family conflicts and establish plan.

One full time employee – Texas Certified Guardian, BSW, MS in Geriatrics, background in guardianship, case management, mental health, IDD, & Medicaid Waiver programs

One PRN staff – Texas Certified Guardian, BA in Psychology, background in Guardianship, Mental Health and Case Management



*North Texas
Guardianship Services, LLC*

Future

- Updating payment schedule
- Increasing Networking and partnerships
- Expand Services to Neighboring Counties
- Consistent Evaluation of Program and adjust as appropriate





*North Texas
Guardianship Services, LLC*



 **HF** **HAMMERLE**

FINLEY LAW FIRM
SINCE 1984