

GERONTOLOGICAL CURRICULUM FOR ACTIVE PUBLIC CONSERVATORS

A PROJECT REPORT

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ABSTRACT

GERONTOLOGICAL CURRICULUM FOR ACTIVE PUBLIC CONSERVATORS

By

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Demographics in the United States are changing, and there is a larger older adult population than ever before. While some older adults have aged healthily and can maintain their own health and finances, that is not the case for other older adults. Older adults aging with dementia and other incapacitating illnesses, with no family or friends to assist them, may be referred for probate conservatorship. The purpose of this project was to revise an existing curriculum to train new conservators about the aging process, legal process of conservatorship, and estate management. By understanding these components of conservatorship, new conservators will be able to provide better service to conservatees. This project will utilize classroom training in addition to shadow training with conservators and conservatees. The training was reviewed by an expert panel and revised to its final version. It will be provided to the Office of the Public Guardian for implementation.

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TABLE OF CONTENTS

ABSTRACT	ii
ACKNOWLEDGEMENTS.....	iii
LIST OF TABLES	v
1. INTRODUCTION	1
2. REVIEW OF LITERATURE.....	9
3. METHODOLOGY.....	20
4. RESULTS.....	25
5. DISCUSSION AND RECOMMENDATION	33
APPENDICES	37
A. AGEISM QUIZ.....	38
B. CURRICULUM EVALUATION FORM.....	41
C. POWERPOINT PRESENTATION	44
D. NOTES FOR POWERPOINT CURRICULUM.....	82
REFERENCES	85

LIST OF TABLES

1. Results From Expert Reviews.....	29
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CHAPTER 1

INTRODUCTION

As adults age, they sometimes lose capacity and are unable to manage their own affairs. Family and friends may help older adults who are no longer able to care for themselves. The problem for some older adults is when there are no involved family members or friends that are willing or able to help. Adults without support are vulnerable to financial and physical abuse, sometimes done to them by other individuals, and sometimes done onto themselves. According to the National Council on Aging (2017), approximately 1 in 10 Americans 60 years and older have experienced some form of elder abuse. In order to prevent abuse, there are community resources, such as the Public Guardian's office, which will investigate the needs of older adults referred to their office for probate conservatorship. In Los Angeles County, there is one office that provides services to individuals in need of services, The Office of the Public Guardian.

Probate conservatorships are set up for individuals who are unable to provide food, clothing or shelter for themselves, in addition to the inability to care for their health and finances. In the Los Angeles County Office of the Public Guardian, the majority of probate cases involve older adults with dementia and other serious illnesses. The Los Angeles Office of Public Guardian is headed by one Deputy Director, the Public Guardian, who oversees Deputy Public Guardians who will work on her behalf in cases where a Public Guardian was appointed. In California, there are Public Guardians for each county, but the functionality may be different as each county is left their own discretion to how they organize their offices (California State Association of Public Administrators, Public Guardians, and Public Conservators [CAPAPGPC], 2017).

Background of the Problem

Increase of the Older Adult Population

It is not new information that there is a serious shift in population dynamics in the United States. In the near future, there will be a larger older adult population than ever before. According to the U.S. Census Bureau (2010), in 2050 it is projected there will be 88.5 million Americans aged 65 and older, more than double its projected population in 2010. The “Baby Boom” generation, those born between 1946 and 1964, is currently entering their senior years, and society is quickly trying to adapt. While there is an increase in the elderly population, these people are not always in the best of health. For example, the Alzheimer’s Association (2017) reported that an estimated 5.5 million Americans are living with Alzheimer’s dementia as of 2017, 5.3 million of which are aged 65 and older. Dementia has many signs and symptoms that incapacitate people leaving them unable to manage their own lives.

Currently, there is a lack of data regarding adults in conservatorships (guardianships). In an exploratory survey conducted for the National Center on Elder Abuse, Wood (2006) found an absence of hard data concerning the incidence of elder abuse or people assigned a guardian. There is no uniform collection of guardianship statistics. Of the statistics that have been collected, “there were approximately 300,000 to 400,000 adults under guardianship in the country and that 67 % were female, the average age of wards was 79, 33% of wards were moved during the guardianship, and 64% were in a nursing home sometime during the guardianship” (Wood, 2006, p. 11). One finding of the study is the lack of consistent data collection from the courts. Wood does point out that while there is a lack of data, there is also a lack in funding that would be needed to collect the data.

When these incapacitated older adults have nobody else to depend on, they are referred to the Office of the Public Guardian. Currently, the average caseload for a probate caseload Deputy Public Conservator is 60 older adults. At full capacity, there are 14 caseload deputies, and with 60 cases for each deputy, that would add up to about 840 older adults that have been appointed a Deputy Public Guardian. These numbers are only an average and are expected to grow in the upcoming years.

Function of Public Guardian

Public Guardian is a “last resort” in which a person has no alternative representative to act on his/her behalf. Specifically, in Los Angeles County, there are two types of conservatorships within Public Guardian Office: Probate and Lanterman Petris Short (LPS). An LPS conservatorship is established for a person who has a serious mental illness who is unable to care for him or herself. The focus, however, of this project will be probate conservatorships. A probate conservatorship is established for a person who is unable to manage their own care or finances or unable to provide adequate food, clothing and shelter for themselves (Los Angeles County Department of Mental Health [LACDMH], 2017). Any interested party can submit a probate referral for someone they believe would benefit. When available, family, friends, or private conservators will be appointed; however, when a person has no family/friends to care for their person and estate and they do not have the funds for a private conservator, the Office of the Public Guardian is appointed. The Office of the Public Guardian is headed by one Public Guardian, and in Los Angeles County, it is the Deputy Director. All public conservators, working under this Public Guardian in the Office of the Public Guardian, are Deputy Public Guardians, who work on his behalf. There is common confusion with hospitals and facilities between the

appointed Public Guardian (one person) and Deputy Public Guardians (many). Training for the position takes place over about 3 months of 2-hour training sessions dealing with the different aspects of conservatorship such as health, finance, property, and ethics. This position has a high turnover rate resulting in a steady flow of new staff in and out of the office. Although a bachelor's degree is required for the position, there is no requirement of experience with elderly adults. Furthermore, this county entity runs on a restricted budget, which is approved by the Los Angeles County Board of Supervisors.

Lack of Resources

Typically, senior centers provide the public with information about the myriad of organizations that can help older adults, such as Dial-a-Ride, Meals on Wheels, and Bet Tzedek. Although these are well-respected organizations that provide services to the community, they may not be informed about probate conservatorships, how they work, and possible alternatives to conservatorship.

Public Perception

The Office of the Public Guardian does not have a strong positive reputation from the public's perspective. The public considers conservatorship intrusive over a conservatee's rights. There have been incidents in past years where publications pointed out the mistakes of public conservators, providing examples where clients fell through the cracks of the system. Considering public perception in training can help to motivate conservators to provide better services to help improve public perception.

Statement of the Problem

A challenge within the Public Guardian's office is that there is a lack of training and

knowledge regarding the aging process, including the “bio-psycho-social” model. Yasuda (2011) created a gerontology curriculum to help support the ethical performance of conservators by training them in gerontology. Although she created an excellent curriculum that was rated as very effective by selected gerontology professionals, there are additional issues that can be revised or added into this curriculum. This project will address both the personal interactions, as well as the general administration that comes with conservatorship. A conservator has responsibilities, and this project director, who is a conservator herself, aims to provide a general overview of each responsibility. The Public Guardian’s Office has many employees that are passionate about what they do; however, there is a lack of general understanding of the aging process. There is no formal requirement of knowledge about the aging process, although there is a preferred desire for employees to have a degree in a social science. There is also a misunderstanding of the order of the office. In order to better help these employees, a gerontology curriculum, such as that developed by Yasuda, can be implemented with minor adjustments. In addition, there should be more outreach to the community to understand what services are provided.

Purpose

The purpose of this project is to revise an existing gerontology curriculum for public conservators, to provide more in-depth knowledge on aging, the various conditions conservatees encounter, and define the overall concept of conservatorship and all of the duties it entails. This revision will help prepare public conservators for the issues that may arise when one is appointed conservator over a person and/or an estate. This project aims to prepare public conservators to provide better care to the conservatee and ensure that they are acting in the best interest of the client at all times.

Importance of the Project

This project aims to increase the productivity and overall performance of conservators. The project director is very familiar with Public Guardian's office; she currently holds the position of Deputy Public Conservator/Administrator. Through her experience in this position, she will be able to oversee improvements that can be made to provide better overall services to conservatees, as well as provide additional training and information that could better prepare Deputy Public Guardians for the role they are about to assume.

The role of a conservator is challenging and can sometimes take a person into complex situations where difficult decisions must be made. A conservator will have to provide medical consent to medical procedure, both major and minor. They might have to be the person that determines whether a conservatee can continue to live at home, or whether they need to be placed in a care facility where they can receive medical services throughout the day. Also, a conservator can be the person who decides when to sell someone's home. Conservatee and conservator are not always in agreement, which can lead to difficult decision-making; however, a conservator who is well trained is more likely to feel more confident and make better decisions on the conservatee's behalf.

Introduction to the Program Being Developed

The curriculum will entail a PowerPoint presentation that will be used for new probate public conservators based on researched information, as well as personal experience obtained while holding the position of Deputy Public Conservator/Administrator II. The curriculum will consist of two 8-hour trainings; each day of training will be split between 4 hours of classroom training and 4 hours of shadow training. This training is meant to be used as a basic,

introductory, training before more in-depth training required by the office. It will not count towards the required trainings for new deputies.

Operational Definitions

Authority of person and/or estate: Authority of “person” means to have the authority to consent of medical procedures and medical decisions that involve a person’s life/being. Authority of the “estate” is the authority over a person’s property (personal or real) or financial matters.

Conservatee: A person who has a court-appointed conservator.

Conservatorship: In this paper, all conservatorships discussed are probate conservatorships. A probate conservatorship is a court proceeding in which a person who is conservator is appointed the responsible party of an adult who is unable to care for themselves and/or their finances.

Gerontology: The study of aging. It includes the study of physical, mental, and social changes in older people as they age.

Incapacitated adult: A person who is unable to meet their needs for physical health, food, clothing, or shelter.

Assumptions

Assumptions of this project are all in relation with the Los Angeles County, Office of the Public Guardian. This training program is centered on the assumption that this training program would be used with new conservators within their office. Another assumption is that there would be seasoned conservators available to be shadowed by new conservators.

Delimitations

A limitation of this project will be the lack of implementation and evaluation of the

curriculum. Although the curriculum is being developed for the use of new conservators at the Los Angeles County, Office of the Public Guardian, it is not within the scope of this project for the curriculum to be evaluated based on presenting it to new employees. Rather, feedback will be gathered from a panel of experts in this area.

CHAPTER 2

REVIEW OF LITERATURE

The purpose of this project is to revise an existing gerontology curriculum for public conservators, to provide more in-depth knowledge on aging, the various conditions conservatees encounter, and define the overall concept of conservatorship and all of the duties it entails. This revision will help prepare public conservators for the issues that may arise when one is appointed conservator over a person and/or an estate. This project aims to prepare public conservators to provide better care to the conservatee and ensure that they are acting in the best interest of the client at all times.

This chapter will review existing literature regarding conservatorship, such as the types of conservatorship, the role of a conservator, and a comparison between a conservator and a power of attorney. Characteristics of the conservatees will be discussed focusing on their health. It will also review the opportunity for improvement at the Los Angeles Office of the Public Guardian. Lastly, the existing curriculum (Yasuda, 2011) will be introduced and discussed.

Conservatorship

According to the Judicial Counsel of California, a conservatorship is created when a judge appoints a responsible person or organization to care for another adult who cannot care for himself or manage his finances (2017). Friedman and Starr (1995) explain the different circumstances that bring people to conservatorship, the process of how someone is referred, and how one can have their conservatorship terminated. As stated earlier, there are two types of conservatorship - LPS conservatorship and probate conservatorship. This project will focus only on probate conservatorships that are generally for older adults that cannot manage to care for

themselves.

Types of Conservatorship

Conservatorship, as stated earlier, is not something that can just be created and ended by a person; only a court can make a conservatorship and appoint a conservator (Freidman & Starr, 1995). There are different steps to establish a conservatorship. First of all, a relative, a friend, or even a person themselves may petition for conservatorship. This is specific to probate conservatorships. Reasons to petition for conservatorship vary from situation to situation. Probate conservatorship referrals come in due to various incidents: an older adult wandering the streets lost and confused, an older adult found in their home without food, an older adult who suffered a fall or health injury and cannot care for themselves (Freidman & Starr, 1995). There are also other instances where referrals are sent in such as when an older person cannot manage their finances and they continue to forget to pay rent or utilities.

When a person is referred for conservatorship, alternatives are considered before being appointed a public conservator. Although the court maintains sole discretion of who is appointed, there is a list of preferences. First, there would be an investigation to determine whether there is a spouse or domestic partner that would be willing to be named conservator. If there were no such person, preference would then go to an adult child. Next would be a parent of the proposed conservatee. Again, if there were none available, it would be passed down to the sibling of the proposed conservatee (Ross, 2002). It is when there is none of the above, or no other interested party, that a public conservator would be appointed.

Based on the various reasons a person can be referred to the Office of the Public Guardian, there are different types of conservatorship. There can be a conservator of the estate,

as well as a conservator of the person. Typically, there is one conservator over both the estate and the person, but it depends on the case. A conservator of the person is “expressly vested with the power to fix the conservatee’s residence and, under prescribed conditions, to give or withhold medical treatment” (Ross, 2012, p.764). Like it sounds, a conservator of the person is concerned with only the conservatee himself, he is not required to manage the conservatee’s finances. A conservator of the estate “is responsible for the conservatee’s support and maintenance, debts and expenses, and general management and control of the conservatee’s assets and financial affairs” (Ross, 2012, p.766). The limitation of the conservatorship is based on the details of the proposed conservatee. An older adult with a large estate with various assets might want a bank or private agency to be the conservator over the estate, while the Public Guardian is appointed conservator of the person. There are also situations where the older adult can manage his own person and make medical decisions, but just needs assistance with his finances, and so Public Guardian is only appointed conservator of the estate.

Throughout a conservatorship, at least in California, there is a court investigator, which is said to be the eyes and ears of the court. This investigator is an impartial third party, “responsible to the court and nobody else, who would advise wards of their rights and look after their interests” (Freidman & Starr, 1995). These investigators are there to ensure that conservatees are in the least restrictive setting possible and that all needs and concerns are met. This officer of the court will go out 1 year after the conservatorship is created and every 2 years after that. A court investigator is not assigned in the case of all conservatorships/guardianships. Rather, the inclusion of the court investigator was the start of reform to help ensure that the conservatorship did not strip a person of rights, as well as ensure his conservator is, indeed, acting in his best

interest.

Conservatorship Versus Power of Attorney

A fair comparison would be that of a conservator to a power of attorney (POA), which is a person chosen by an individual to represent them when they are unable to. Friedman and Starr (1995) gave the example of when a person goes on vacation in another country and is unable to issue payments or manage his finances. He will name another person, his POA, and that person will manage their affairs on the person's behalf. Unlike a POA, however, a conservatorship may or may not be chosen by the ward. Conservatorship is court-ordered and court-monitored by the judge and court investigators. Power of attorneys are not court monitored, and they may come to an end when the individual is able to manage their affairs again. For many older adults who do not have someone in their life that can/will take on the responsibility of a POA, and they, themselves, cannot manage their own lives, they turn to a conservator.

Roles of a Conservatorship

The role of a conservatorship is very straightforward. Conservatorship was created to “protect” individuals who are “at risk” and “lack adequate support” (Gassoumis, Navarro, & Wilber, 2015, p. 791). As mentioned earlier, there are different types of conservatorship that will have more specific roles, but whether it is a conservatorship of the person or conservatorship of the estate, the main role is to act in the best interest of the conservatee. A conservator of the person focuses on the health and well-being of the conservatee. Conservators make all medical decisions, ranging from flu vaccines to major surgery, and even arrange for end-of-life decisions. A conservator of the estate focuses more on financial aspect, collecting all accounts and income for the conservatee. This also includes managing any real property the conservatee may own. It

should also be mentioned that a conservator of the estate can bring to the court's attention any issues that he or she may find concerning a person, although they may only have a conservatorship to the estate. Some conservatorships are initiated as only conservatorship of the estate, but as a person might progress into their illness, they may lose the capacity they initially had and may now require "General Conservatorship," which is the conservator of person and estate. Conservators are to follow the Probate Code while making decisions on their conservatee's behalf.

Characteristics of a Conservatee

When a conservator is appointed over a conservatee, they are given certain rights or "powers." The powers can allow the conservator to make medical decisions for the conservatee, as well as provide consent for medical treatment. There are critics that believe this is too much power; however, the illnesses these older adults are suffering from often are incapacitating, leaving the older adult without the ability to handle their own care. Although there are limited studies that have researched conservatorship, in the studies that have been conducted, "the average age of conservatees has ranged from 76 to 81" (Reynolds & Wilber, 1997, p. 88). Reynolds and Wilber (1997) also noted that conservatees typically were low income and most lived in nursing homes or hospitals.

Alzheimer's Disease and Other Mild Cognitive Impairment

Many older adults under conservatorship are suffering from Alzheimer's disease or some other type of mild cognitive impairment (Reynolds & Wilber, 1997). According the Alzheimer's Association (2017), an estimated 5.5 million Americans of all ages are living with Alzheimer's dementia in 2017. In California, it is projected that 630,000 people are living with Alzheimer's,

and it is projected that by the year 2025, it will increase to 840,000 people. Alzheimer's disease is a very serious disease in which there is no cure. Alzheimer's disease is characterized by a progressive sequence of clinically observable decreases in memory, in independence, cognitive function, and mobility (Magalini, Scarsini, Schena, & Venturelli, 2012). These adults are sometimes experiencing symptoms when the conservatorship is requested. What some older adults might consider a side effect of old age can sometimes be symptoms of Alzheimer's disease, such as aggressiveness, agitation, delusion, and wandering. As stated earlier, there is no cure for Alzheimer's disease; it is a progressive disease of decline where patients lose their independence with easy activities of daily living. "With the aging of the US population, the number of older adults with dementia is expected to increase over the next several decades, as will the number without family" (Berman, Fleming, Howe, & Weiss, 2012, p. 2144). Alzheimer's disease is a very serious illness considering conservatorship because there is no cure, and it can be very debilitating, leaving adults with the disease to rely on others to help manage their lives.

Diabetes

Diabetes is a very serious condition, whether one is an older adult or not. According to the American Diabetes Association (2017), more than 25% of the U.S. population aged 65 years and older has diabetes. Some adults can manage their diabetes with a Metformin prescription. Others might need daily insulin shots, which require an adult who has the ability to see the syringe to fill it, remember to take it, and steady hands to inject the insulin. In addition to the medication that is needed, diabetes also limits the diet for a person, necessitating careful monitoring of their sugar. Without the capacity to properly manage diabetes, the side effects can be drastic. "Older adults with diabetes have the highest rates of major lower-extremity

amputation, myocardial infarction, visual impairment, and end-stage renal disease of any age-group” (Kirkman et al., 2012, p. 2651). This disease requires a person’s full abilities to manage, and without capacity and a person to assist them, they may become seriously ill.

In addition to the diseases described above, there are multiple other illnesses that older adults experience that can leave them incapacitated. Chronic obstructive pulmonary disease, coronary artery disease, chronic kidney failure, stroke, and cancer are all coexisting medical conditions that occur with the above-mentioned diseases.

Opportunity for Improvement at Los Angeles Office of the Public Guardian

Educational Requirements for Conservators

The requirements in California for public conservators are set by the CAPAPGPC. This association ensures that public conservators/guardians maintain good standing with Code of Ethics of the Association, as well as maintaining 40 hours of ongoing education and training (CAPAPGPC, 2017). The topic of these trainings can vary and includes topics such as Laws and Codes, Investigation, Funeral Arrangements, Administration and Case Management, Identifying and Marshaling Assets, Benefits, Inventory and Appraisals, Taxes, Property Management, and Medical Consents. In order for trainings to count towards recertification with the administration, the topics must be focused on their approved list. Any other public conservator education is at the discretion of the agency. In the Los Angeles area, the additional resources that may be given to family members that wish to be conservators include Bet Tzedek, which is a commonly used agency that provides elder law services to low-income seniors (2017).

In studies that have been conducted regarding conservatorships or guardianships, a lack of consistent training has been pointed out. In her 2006 exploratory survey, Wood (2006) found

that there is a need for uniform, consistent training and standardized definitions. She was unable to find consistent training that is required by conservators throughout the country. There is no uniformity, which is why in some states or counties, the terms conservator and conservatee are interchangeable with guardian and ward. In addition to required training through the CAPAPGPC, local agencies, such as the Office of the Public Guardian, are allowed to present training to their staff that is considered relevant to their job. Trainings at the Los Angeles Office of the Public Guardian are created following the certification requirements, but also, general information that management deems necessary to keep their staff well informed and prepared for their jobs (L. Leyva, personal communication, September 15, 2017).

Perception in the Community

There are many criticisms of conservatorship. Some people refer to it as “civil death” and believe that it gives too much power to one person over another person’s life. However, many negative images come from misunderstanding of how the process works. Los Angeles County created the Public Guardian’s Office in 1945 to help older adults, when there was nobody else to help them (Fields, Larrubia, & Leonard, 2005).

Reynolds (1997) studied perception compared to reality, observing the criteria for placing older adults on a probate conservatorship. She described conservatorships as “intrusive.” She pointed out three reasons for this. First, the appointments were involuntary and reduced the legal status of the adult to that of a minor. Secondly, conservatorships “inappropriately” subjected older adults to negative outcomes. Lastly, she pointed out judicial oversight of conservatorship is insufficient because courts are understaffed and underfunded. Reynolds (1997) stated that “at best” it was compassionate ageism,” and at worst “a negative mechanism of social control” (p.

518). At the end of her study, her hypothesis of ageism was not supported, in that the study revealed that the age of the potential conservatee did not matter, rather their abilities of daily living (ADLs) and behaviors caused more investigation to whether they would need conservatorship. Reynolds's article was helpful in showing that despite the preconceived notion that public conservatorship is "intrusive" and "inappropriate," there is often a need, not based on age, but rather the overall capacity of the adult being referred.

While public conservatorship sets out to help adults who cannot help themselves, it has also encountered its share of problems when it comes to resources, specifically money and manpower. In an article from the *Los Angeles Times* titled "For Most Vulnerable, a Promise Abandoned," Fields et al. (2005) described specific experiences inside the Los Angeles County Public Guardian's Office that are not success stories, but rather, stories of clients who fell through the cracks, and those who were denied services, such as Tamara Arutunian, Charles Donelon, Easter Moon, along with others mentioned in the article. It is easy to say that this is the result of poor management or employees; however, the writers also discussed the morale, or lack thereof in the office. There are serious issues within the Office of the Public Guardian that create obstacles to providing the best service towards its conservatees. There is a lack of funding, which leads to a lack of staffing, and without these two components, Public Guardian will continue to experience these familiar obstacles.

A common argument is that people are inappropriately conserved, that their civil rights are taken away when they can still maintain their lives, themselves or by other family/friends. Reynolds and Wilber (1997) focused on the common concern of the characteristics of conservatees and similarities and differences between Los Angeles Office of the Public Guardian

(LAOPG) clients and adults in the Assets and Health Dynamics Among the Oldest Old Survey (AHEARD), which is said to be representative of adults 70 years and older. This study found that probate conservatees are “far less likely to be married and far more likely to be single, separated or divorced.” When it came to the capacity of these probate conservatees, it was found that conservatees were “far more likely to suffer from ADL impairments” (Reynolds & Wilber, 1997, p. 92). In the article’s final discussion, it was mentioned that the research does suggest that “the older adults in public conservatorship in Los Angeles appear to reflect the appropriate target population: socially isolated and highly impaired adults” (Reynolds & Wilber, 1997, p. 95).

Description of Yasuda’s Curriculum

Yasuda’s Gerontological Model Curriculum (2011) was created with the expectation to support the ethical performance of conservators, using basic bio-psycho-social knowledge of the aging process. Yasuda organized her curriculum into five sections: introduction, biological aging, psychological aging, social aging, and case studies. Her program was set as an 8-hour class. In her project, Yasuda (2011) mentioned, “the aging content was the sole focus, and the legal process and the estate management portion was excluded” (p. 32). Although understanding the aging process is very important for a conservator, the current project aims to expand Yasuda’s aging content, the legal process, and estate management. A large part of her curriculum is based on andragogy, to ensure the program instructors understood how to teach the content most effectively to their participants. Although she used this concept to guide her program, it will not play a large part in the proposed curriculum. The feedback that was provided to Yasuda was positive; the most requested modification was to include information relevant for adults with life-long developmental disabilities. Limitations to her curriculum were that it was unable to be

implemented with acting conservators. Yasuda recommended that future researchers conduct a program evaluation for the effectiveness of the program after it was implemented. Overall, the existing curriculum developed by Yasuda (2011) was very well created and evaluated with recommendations for improvement.

Summary

Public conservatorship is an option that can be beneficial to many older adults that do not have anybody else to manage their affairs. The reviewed literature points to the lack of education that is required of public conservators. Based on strong criticism about the program and the amount of power this conservator has over another person, it would be in everyone's best interest to provide more education and training before and after becoming a conservator. Not only should training address the duties of the job, probate codes and the different processes of conservatorships, but also information about working with older adults and symptoms of their illnesses. In order to provide the best services to the conservatee, a conservator must be able to meet all of their biological, psychological and social needs. Public conservators are often the "last resort" for people who do not have family or the funds for a private conservator, and they should receive these services from a highly trained professional.

CHAPTER 3

METHODOLOGY

The purpose of this project is to revise an existing gerontology curriculum for public conservators, to provide more in-depth knowledge on aging, the various conditions conservatees encounter, and define the overall concept of conservatorship and all of the duties it entails. This revision will help prepare public conservators for the issues that may arise when one is appointed conservator over a person and/or an estate. This project aims to prepare public conservators to provide better care to the conservatee and ensure that they are acting in the best interest of the client at all times.

In this chapter, the procedure of the revisions to an existing curriculum for conservators will be described, including the target population and timeline of the curriculum, and the procedures for revising the curriculum including a timeline and topics for inclusion. Finally, it will detail the process for presenting the curriculum for review by management at the Los Angeles County Office of the Public Guardian.

Target Population

This project will be designed for current and future public conservators. It will be focused on public conservators because these are people who may not have had any prior experience with conservatorship. Public conservators, like those in the Los Angeles County Public Guardian's Office, are usually the "last resort" for older adults in need of a decision-maker to manage their affairs and these conservators should be as prepared as possible for these potential conservatees. This curriculum would succeed for public conservators like those at the Los Angeles Public Guardian's Office because it can be used as a baseline training to prepare all conservators prior

to working with conservatees. It will also be a helpful tool for reference after the training.

Timeline for the Program

While Yasuda's 2011 curriculum was a 1-day, 8-hour training, the current project proposes to have a 2-day training of 8 hours each day. Day one will focus on the overall function of a conservator, the details of conservatorship and all of the duties it entails. The second day will focus on familiarizing conservators with the common characteristics of their clients. These two 8-hour days would be organized into 4 hours of informational training and 4 hours of shadow training for each day.

Program Development Procedure

Program Outline

Review of existing curriculum. Before the revised curriculum can be created, this program director will first examine the curriculum created by Mayuko Yasuda. Yasuda (2011) created a curriculum that would take place over an 8-hour period. Her program method was centered on andragogy to ensure instructors would teach in a way that participants would get the most out of the program. The content of the curriculum was heavily focused on the aging process.

Collection of relevant materials. This curriculum will attempt to be more inclusive of the legal process of conservatorship, estate management, as well as the aging process. Materials from the court will be reviewed for material regarding the initiation and appointment of a conservator. For estate management, the program director will get information from employees at the Office of the Public Guardian. There is limited research that can be found that deals with estate management with a public conservator. Lastly, in addition to Yasuda's exiting information,

the program director will add additional information on the aging process that may have been left out in the existing curriculum.

Components to the revised curriculum. This curriculum would consist of a PowerPoint presentation. While the presentation is being delivered, participants will have the outline of the presentation available to them to make any notes on. This program will be two 8-hour days; each day will have a 4-hour lecture followed by 4 hours of shadowing experienced conservators at the Los Angeles Office of the Public Guardian.

Day One. The first day will be a general overview of what a conservator is and what role a conservator takes on once a conservatorship is established. This will cover the different types of conservatorship and the functions of a conservator. Yasuda's program did not focus on this aspect, but it is a significant part of conservatorship that needs to be explained first and foremost. Many public conservators start the job with very little, if any, knowledge about conservatorship. The first hour would utilize the Ageism Quiz (Palmore, 1999) also used in Yasuda's program (Appendix A). This will test the prejudices people have against older people. Once the answers to the quiz are given, the information will proceed into the overview of what a conservatorship, conservatee, and conservator all are. Hours 3 and 4 will go over the general duties of a conservator: their medical duties to the client, their financial responsibilities to the client, and all other responsibilities a conservator encounters throughout a conservatorship. This is a short time frame for so much information, but from here, conservators-in-training will shadow experienced conservators at their desks to witness their duties in actions. At this point, questions can be asked, and experienced conservators can go more in-depth with their duties, as well as give examples of what he or she may experience on any given day.

Day Two. The second day of training will be structured like the first: 4 hours of informational training followed by 4 hours of shadow training. The informational training will be very similar to the information that Yasuda uses in her program regarding the physical aspects of aging, such as: the aging process and sensory issues, and health management. These 4 hours will be used to familiarize the new conservators with the life situations of their future conservatees. Two hours will discuss the issues some older adults have encountered with their senses, how this may or may not their activities of daily living, and what they, as conservators, can do to monitor and ensure each conservatee's needs are being met. The last 2 hours will discuss the common illnesses conservatees experience. This will discuss each illness with its risk factors, symptoms, and treatments. Again, this is important information that will be delivered in only 4 hours, but following the information, trainees will go out with experienced conservators to shadow them on their visits with conservatees. During these shadowed visits, trainees will be able to see the different clients they will encounter, with different illnesses, in different living situations, and with different capabilities. During these 4 hours, trainees may interact with conservatees and experienced conservators to ask questions or request additional explanation.

Expert review and feedback. Once the curriculum has been revised to include the updated information, it will be submitted to an "expert panel" of current conservators at the Los Angeles Office of the Public Guardian. The program director will request for this panel to review the program and provide and feedback using an expert review form (Appendix A). The evaluation form opens by informing the reviewer of the purpose of the project, as well as the instructions to complete the evaluation form. There are seven questions that inquire about the overall content of the presentation, as well as each topic within it. Reviewers were given a Likert

scale to respond with: 0 = Strongly Disagree, 1 = Disagree, 2 = Agree, 3 = Strongly Agree, N/A = Does not apply. There were seven questions regarding the same topics as described above, requesting written responses of suggestions or additional comments regarding the curriculum. The researcher noted these comments for an improved curriculum.

Project Developer Role and Qualifications

The project developer currently holds the title of Deputy Public Conservator/Administrator II at the Los Angeles County Office of the Public Guardian. Her experience in the office and interactions with staff and clients has helped inform her of the gap that exists between conservator training and conservator performance. She has worked as a public conservator in this office for approximately two years. She currently is conservator to over 60 clients.

Summary

Although Yasuda (2011) created an excellent program, there is additional information that can be added for new conservators in order to provide the best service to their conservatees. The program being created will be in the form of a PowerPoint presentation that consists of two 8-hour trainings including a lecture and shadow training. The curriculum being presented in the presentation will be reviewed by an expert review panel. Once feedback is received, the curriculum will be revised as needed. This training will attempt to include all information thought necessary for new conservators.

CHAPTER 4

RESULTS

The purpose of this project was to revise an existing gerontology curriculum for public conservators to provide more in-depth knowledge about aging, various conditions of conservatees, and to define the overall concept of conservatorship and the duties it entails. This revision will help prepare conservators for the issues that may arise when one is appointed a conservator over a person and/or an estate. This project aims to prepare public conservators to provide better care to the conservatee and ensure that they are acting in the best interest of the client at all times.

This chapter will provide a general overview of the 2-day curriculum (Appendix B), organized by day as well as by section. Day One was designed to be offered in two parts. Part One is a 4-hour informational training session, followed by Part Two, which is 4-hour shadow training session. The topics discussed during Day One of training are a general discussion about conservatorship, the role and duties of the conservator, and the needs and characteristics of the conservatee. Day Two was also designed to be offered in two parts, with Part One as a 4-hour informational training, followed by Part Two, a 4-hour shadow training session. The topic covered during the second day is visits with conservatees. Lastly, feedback about the curriculum from expert reviewers and modifications to the curriculum based on the feedback will be provided.

Content of the Curriculum

This project entailed the development of a curriculum for new conservators at the Los Angeles County Office of the Public Guardian. The content of the curriculum was designed to be

presented in the form of a PowerPoint presentation, as well as in-person shadow training.

Day One

Introduction. The presentation begins with an overview of the program, describing how information will be broken up by day, and how each day will be composed of a 4-hour informational training and 4-hour shadow training. The first day will start off with the Ageism Quiz (Palmore, 1999) that will break the ice and allow the participants to explore and discuss age-related biases towards older adults.

Conservatorship. Conservatorship will be discussed in terms of its roles and responsibilities. The two different types of conservatorship will be introduced, along with the limitations within a conservatorship. Next, it describes how a conservatorship is established, including who is considered, who can submit a referral, and who makes the ultimate decision whether the conservatorship is established. Next, the role of the conservator is described. The specific powers given to the conservator are discussed as well as an introduction to the Letters of Conservatorship. This information will be discussed in slides 7 through 17.

The legal process of conservatorship. The legal process of the conservatorship is expressed briefly by showing and explaining the different legal forms that are submitted throughout a conservatorship. This information will be discussed in slides 18 through 23.

Characteristics of the conservatee. Characteristics of conservatees are described in detail, specifically by the common health issues conservatees encounter. This curriculum focuses on dementia, diabetes and cardiovascular diseases. The two types of dementia described are Alzheimer's disease and vascular dementia. Diabetes and cardiovascular disease are discussed before discussing end-of-life decisions made for conservatees. This information will be discussed

in slides 24 through 31.

Estate management. This section is described, first, by introducing the various types of incomes received by the conservatees. As a conservator, all of the conservatee's income and assets will be received and managed by the conservator through the Office of the Public Guardian. Bank accounts are described as well as what occurs to them once a person is placed under conservatorship. Property, both real and personal, is discussed regarding the collection and disposition. Slide 48 discusses where the funds that are collected are used. An example that is given is burial arrangements. Conservators are often responsible to use funds to purchase a pre-need to have in place when the conservatee passes away. This information will be discussed in slides 42 through 50.

Shadow training (Day One). This part of the training will consist of one-on-one training with an experienced deputy. The person in training will sit at the desk (they will have the opportunity to shadow a home visit during Day Two) and watch the daily duties of the conservator. The informational session was a brief overview, but through direct observation, the trainee will be able to better understand the information that was just provided to them. Trainees will have the opportunity see all confidential documents in the Office of the Public Guardian. Trainees will also have the ability to ask questions from experienced deputies. This is mentioned on slide 51; however, more specific information will be discussed by the person the trainee is shadowing.

Day Two

Periodic visits. This section, although technically about one major topic, is broken down into the different components of a periodic visit. There are quick words of advice given to

trainees. The information regarding periodic visits starts with the different types of placements (skilled nursing facility, board and care, assisted living facility, and private residence) that conservators will enter while visiting their clients. Next, trainees learn about the information they need to check for during a visit, as well as where to find it. Interactions with the conservatee are discussed, focusing on what to check for, how to speak with the conservatee, and what questions to ask. A list of “key players” is provided next, which goes over staff members that they are most likely to interact with on a typical periodic visit. The section ends with discussing what comes after visiting with the client. Trainees are told that they are to take their information back to the office and document it in the Office of the Public Guardian’s online system. This information will be discussed in 53 through 68

Shadow training (Day Two). This part of the training will take place completely in the field. Again, a trainee will be paired with an experienced conservator that will take the trainee with him. The trainee will shadow the conservator all throughout the visits, whether it is with just the conservatee or during meetings with the nurses and supporting staff. The trainee will be able to ask any questions he or she has regarding the visit process. Although there is not as much content in this section of the curriculum, visits vary from conservatee to conservatee, so it is very likely there will be more on-the-spot lessons and questions exchanged between the experienced conservator and the trainee. This is mentioned on slide 96. The seasoned conservator being shadowed will provide additional information.

Feedback from the Expert Review

Feedback from the expert reviewers regarding the clarity and helpfulness of the curriculum were mixed. Four current employees of the Los Angeles County Office of the Public

Guardian were asked to participate as expert reviewers. The job titles of these individuals ranged from Deputy Public Conservator/Administrator I, Deputy Public Conservator/Administrator II, Supervising Deputy Public Conservator/Administrator, and Assistant Division Chief. The experience of the reviewers ranged from less than 2 years to more than 10 years. Each was provided with a printout of the PowerPoint presentation and asked to complete the curriculum evaluation form. Hard copies of the curriculum and evaluation form were given to each reviewer and they were asked to provide comments on the provided hard copy. Evaluators were given 2 to 3 days to review the curriculum and complete the evaluation form.

TABLE 1. Results From Expert Reviews

Questions	Average Rating	Comments provided by reviewers
1. The program objectives are well clarified and specified.	2	
2. The introduction is well developed to raise the learner’s motivation	2.25	
3. The roles and responsibilities of a conservatorship are well discussed throughout the curriculum.	2.75	Include brief history of the Los Angeles County Office of the Public Guardian.
4. The legal process of a conservatorship is well discussed throughout the curriculum.	2	Expand sections and correct informational mistakes.
5. The aging process/ medical background of the conservatees is well discussed throughout the curriculum.	2.5	Break apart slides and discuss further.
6. Estate management is well discussed in the curriculum.	2.5	Break apart slides and discuss further.
7. Conservatee-conservator interactions are well discussed in the curriculum	2.25	Provide more information regarding the placement of conservatees.

(0 =Strongly Disagree, 1 =Disagree, 2 = Agree, 3 = Strongly Agree).

The first question asked whether the program objectives are well clarified and specified. One reviewer strongly agreed, two agreed, and one disagreed. The second question asked whether the introduction is well developed to raise the learner's motivation. Two reviewers strongly agreed, one reviewed agreed, and one disagreed. The third question asked whether the roles and responsibilities of a conservatorship are well discussed throughout the curriculum. Three reviewers strongly agreed and one reviewer disagreed. When later asked for comments or suggestions, one reviewer mentioned that information regarding the history of Public Guardian and conservatorship should be added. All other reviewers left no comments/suggestions for this specific topic. The fourth question asked whether the legal process of a conservatorship is well discussed throughout the curriculum. One reviewer strongly agreed, two reviewers agreed, and one reviewer disagreed. When asked for comments or suggestions, two reviewers suggested that this section be expanded, as well as corrections made for specific information. All other reviewers had no comments or suggestions.

The fifth question asked whether the aging process/medical background of the conservatees is well discussed throughout the curriculum. Two reviewers strongly agreed, two reviewers agreed. When asked for comments or suggestions, one reviewer suggested that slides be broken up and discussed further. All other reviewers had no comments or suggestions. The sixth question asked whether estate management is well discussed in the curriculum. Three reviewers strongly agreed, while one reviewer disagreed. When asked for comments or suggestions, one reviewer suggested that slides be broken up with further explanation. All other reviewers had no comments or suggestions. The seventh question asked if conservatee-conservator interactions are well discussed in the curriculum. Two reviewers strongly agreed,

one agreed, and one disagreed. When asked for comments and suggestions, one reviewer asked for more information regarding how placement is decided for a conservatee. All other reviewers had no comments or suggestions.

The last two questions asked for all other comments or suggestions on the curriculum, as well as an overall evaluation of the curriculum. One reviewer was very pleased with the content of the curriculum. She offered no suggestions, but rather compliments on the well-developed curriculum. One reviewer was pleased with the overall content, but offered suggestions to revise the structure of the curriculum so it is easier for the audience is able to take away key points. A third reviewer commented that the overall information was well stated and clear to understand. The only suggestion this reviewer offered is to further explain the legal process within the curriculum. The last reviewer was not pleased with the curriculum. He did not offer any in-depth comments or suggestions, but instead offered general suggestions that all topics need to be further discussed. In addition, this reviewer stated that he did not feel there was a consistent flow throughout the curriculum and that the transitions between topics needed to be improved.

The feedback from the expert review panel will be considered and used to revise the curriculum. Due to the varying responses received from the evaluations, content will be revised based on consistency. Issues that were mentioned by multiple reviewers will be revised, while issues that we reported by only one reviewer will be considered and added if thought necessary by the project director. All expert reviewers were thanked for their participation in the panel. The final version of the PowerPoint presentation, including all revisions suggested by the expert review panel, can be found in Appendix C.

Summary

This chapter discusses the training curriculum created by the project director for new public conservators. This content was provided to a group of expert reviewers who provided their feedback regarding the information in the curriculum. Suggestions from the expert review panel included lessening the amount of information on slides. Slides were broken up and simplified, leaving more information on the notes page (Appendix D) instead of the slides. Minor changes were also suggested regarding general information in the slides.

CHAPTER 5

DISCUSSION AND RECOMMENDATION

The purpose of this project was to revise an existing gerontology curriculum for public conservators to provide more in-depth knowledge on aging, the various conditions conservatees encounter, and define the overall concept of conservatorship and all of the duties it entails. This revision will help prepare conservators for the issues that may arise when one is appointed a conservator over a person and/or an estate. This project aims to prepare public conservators to provide better care to the conservatee and ensure that they are acting in the best interest of the client at all times.

This chapter will discuss the interpretation of the results of the project, based on the comments and recommendations of the expert reviews. It will discuss the implications this project will have for gerontology practice. Finally, it will discuss the limitations and recommendations for future projects regarding conservatorship.

Discussion

Feedback about this project ranged from very positive to not positive. Unlike Yasuda's curriculum (2011), there did not seem to be a consensus within the feedback received on the evaluation forms. The revisions that had to be made throughout the curriculum were specifically focused on the legal process of conservatorship, as well as the amount of information presented on each slide. A common comment or suggestion was to break down the information on the slides and create a smoother transition. As a result of this feedback, the amount of information on the slide was reduced, and instead, a notes page was added for the presenter only to use as speaking points.

Results from the evaluation form highlighted one of the issues that was identified earlier in this project report. There is a lack of training, as well as a lack of consistency in the existing training. The expert reviewer panel was composed of people holding different positions within the office. Feedback scores about this curriculum varied between these positions. While one reviewer considered parts of the curriculum clear and concise, another reviewer was not able to grasp the overall purpose of the curriculum. This feedback made clear that an effective curriculum would have to address the varied learning styles and needs of the audience. Furthermore, these differences in comments and suggestions were interpreted by the research director as an indication that there will always be a gap in trainings regarding conservatorship. Although it is a position that entails many responsibilities, different people may focus on different aspects of the job. If there is no consensus between current conservators, this could explain the different interpretations and perceptions of a public conservator. Earlier it was mentioned that the Los Angeles County Office of the Public Guardian does not have the best public reputation. This could be due to a variation in services provided amongst different conservators. While one public conservator might focus their job around the person's medical status and health, another conservator might be more focused on the estate. The goal of a curriculum would be to provide a foundational level of education about the aging process, the roles of the conservator and the rules and regulations of the Office, despite differences in focus from conservator to conservator.

Implications

This project may help new conservators be better prepared for their new position. People often enter this position without a background or history of working with older adults, or any

idea of what a conservator is or does. This curriculum will help introduce and inform a new conservator of his role. When considering the overall effect of this curriculum, it can possibly increase the productivity of the Office of the Public Guardian. Conservators will be well-informed and well-prepared right when they start. This would ensure a leveled starting point for all conservators, whether they have past experience or not.

Recommendations

This curriculum remained in the development phase throughout the project. It was outside the scope of this project to implement and evaluate the training for new conservators in the Office of the Public Guardian. Implementation of the curriculum, considering all comments and recommendations of the expert reviewers, is a strong recommendation for future study.

Another recommendation would be to formally evaluate the curriculum at the Los Angeles Public Guardian's Office to test the effectiveness of the current trainings. There is no research currently available to determine whether training is effective, or whether it needs to be revised. Studies could review the current training curriculum used by the Office of the Public Guardian and interview the conservators about preparedness for their job. This would be best in order to truly know what information needs to be added into the office's training curriculum.

Furthermore, a public educational resource for agencies that are most likely to refer older adults to the Office of the Public Guardian is needed. Conservatorship is an important resource for adults who have no family or friends to help manage their care. Unfortunately, there is no public resource available to referring agencies. An informational workshop for the community that informs and educates agencies (hospitals, senior centers, banks, etc.) about conservatorship would be beneficial to older adults who are in need of the services, as well as to the agency itself

for future clients.

Due to limited resources from the Los Angeles Office of the Public Guardian, there are many opportunities for research regarding the effectiveness of the trainings and the services provided by the conservator. Conservatorship is a reality for many older adults who have no family or friends to check up on them. The more research that is conducted helps ensure that the Public Guardian's Office is functioning effectively, and their clients are receiving the best care.

Summary and Conclusion

This project report was created to help inform new conservators of their roles and responsibilities as a probate conservator. A lack of general training was identified by the project director, who was therefore inspired to revise Yasuda's (2011) curriculum to include information that should be learned throughout the training process. This project set out to prepare public conservators to provide better care to the conservatee and ensure that they are acting in the best interest of the client at all times. Although this curriculum remained in the development stage, it was created and edited with the comments and suggestions of expert reviewers in mind. The curriculum created is available for testing by future researchers for effectiveness with new conservators at the Los Angeles County Office of the Public Guardian.

APPENDICES

APPENDIX A
AGEISM QUIZ

The Facts on Aging Quizzes

These three Facts on Aging Quizzes are reprinted from Palmore (1998). That book contains full documentation on the correct answers and instructions for various uses of the quizzes (copyright is held by Springer Publishing Company). There are also multiple-choice versions published in that book.

In addition to testing your knowledge about aging, the quizzes can be used as indirect measures of your attitudes about aging (see the Key at the end of this appendix).

I suggest you try these quizzes on yourself by marking each statement "T" for true, "F" for false, or "?" for don't know. Each quiz can be answered in about 5 minutes. The key to the correct answers may be found at the end of this appendix.

The Facts on Aging Quiz: Part 1 (FAQ1)

1. The majority of old people (age 65+) are senile (have defective memory, are disoriented, or demented).
2. The five senses (sight, hearing, taste, touch, and smell) all tend to weaken in old age.

3. The majority of old people have no interest in, nor capacity for, sexual relations.
4. Lung vital capacity tends to decline in old age.
5. The majority of old people feel miserable most of the time.
6. Physical strength tends to decline in old age.
7. More than one tenth of the aged are living in long-stay institutions (such as nursing homes, mental hospitals, homes for the aged, etc.).
8. Aged drivers have fewer accidents per driver than those under age 65.
9. Older workers usually cannot work as effectively as younger workers.
10. Over three fourths of the aged are healthy enough to carry out their normal activities without help.
11. The majority of old people are unable to adapt to change.
12. Old people usually take longer to learn something new.
13. Depression is more frequent among the elderly than among younger people.
14. Older people tend to react slower than younger people.
15. In general, old people tend to be pretty much alike.
16. The majority of old people say they are seldom bored.
17. The majority of old people are socially isolated.
18. Older workers have fewer accidents than younger workers.
19. Over 20% of the population are now age 65 or over.
20. The majority of medical practitioners tend to give low priority to the aged.
21. The majority of old people have incomes below the poverty line (as defined by the federal government).
22. The majority of old people are working or would like to have some kind of work to do (including housework and volunteer work).
23. Old people tend to become more religious as they age.
24. The majority of old people say they are seldom irritated or angry.
25. The health and economic status of old people will be about the same or worse in the year 2010 (compared with younger people).

APPENDIX B
CURRICULUM EVALUATION FORM

Instruction:

The purpose of this project is to revise an existing gerontology curriculum for public conservators, to provide more in-depth knowledge on aging, the various conditions conservatees encounter, and define the overall concept of conservatorship and all of the duties it entails. This revision will help prepare public conservators for the issues that may arise when one is appointed conservator over a person and/or an estate. This project aims to prepare public conservators to provide better care to the conservatee and ensure that they are acting in the best interest of the client at all times.

Based on your expertise, please give your thoughts and feedback to improve the curriculum.

Please read the following statement and circle the answer that indicates how strongly you agree or disagree with each statement:

0 = Strongly Disagree, 1 = Disagree, 2 = Agree, 3 = Strongly Agree, N/A = Does Not Apply

1. The program objectives are well clarified and specified.	0	1	2	3	N/A
2. The introduction is well developed to raise the learner's motivation	0	1	2	3	N/A
3. The roles and responsibilities of a conservatorship are well discussed throughout the curriculum.	0	1	2	3	N/A
4. The legal process of a conservatorship is well discussed throughout the curriculum.	0	1	2	3	N/A
5. The aging process/ medical background of the conservatees is well discussed throughout the curriculum.	0	1	2	3	N/A
6. Estate management is well discussed in the curriculum.	0	1	2	3	N/A
7. Conservatee-conservator interactions are well discussed in the curriculum	0	1	2	3	N/A

a. Please give your suggestions/additional comments on **the roles and responsibilities of a conservatorship**

- b. Please give your suggestions/additional comments on **the legal process of conservatorship.**
- c. Please give your suggestions/additional comments on **the aging process/ medical background of the conservatees.**
- d. Please give your suggestions/additional comments on **estate management.**
- e. Please give your suggestions/additional comments on **periodic visits**
- f. Any other suggestions/additional comments on curriculum.
- g. Overall evaluation of this curriculum content

APPENDIX C
POWERPOINT PRESENTATION

An Introduction to Probate Conservatorship

Los Angeles County, Office of the
Public Guardian

Desirae Gamboa
California State University, Long Beach
Gerontology Program

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Learning Objectives

- Define the roles and responsibilities of a conservator .
- Explain the legal process of conservatorship.
- Describe the aging process and health status of the conservatees.
- Exemplify estate management of conservatee's finances and benefits.
- Summarize periodic Visits (conservator-conservatee interaction)

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Program Overview

DAY ONE

- **CLASSROOM TRAINING:**

- What is a conservator?
- Roles and responsibilities?
- Who is a conservatee?
- Legal Process
- Estate Management

- **SHADOW TRAINING**

- Sit with experienced deputy to see the daily duties of conservator
- Look through case file
- Look through online system to view daily notes
- Overview of desk work

DAY TWO

- **CLASSROOM TRAINING:**

- Periodic Visits

- **SHADOW TRAINING:**

- Field training with experienced deputy. Discuss placement possibilities. Discuss the health of the conservatees. Discuss the staff you will interact with on regular basis.

• 3

DAY ONE: Conservatorship Conservator Conservatee

• 4

Ageism Quiz

- *Palmore, E.B. (1999). Ageism: Negative and Positive 2nd Edition. New York. Springer Publishing*

AGEISM: (Coined by Robert Butler in the 70s) the attitudes, beliefs,

People often have prejudices about the older adult population. This quiz will help participants recognize their biased towards older adults and educate them with facts

• 5

The Facts on Aging Quizzes

These three Facts on Aging Quizzes are reprinted from Palmore (1999). That book contains full documentation on the correct answers and instructions for various uses of the quizzes (copyright is held by Springer Publishing Company). There are also multiple-choice versions published in that book.

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1. The majority of old people (age 65+) are senile (have defective memory, are disoriented, or demented).
2. The five senses (sight, hearing, taste, touch, and smell) all tend to weaken in old age.

3. The majority of old people have no interest in, nor capacity for, sexual relations.
4. Long vital capacity tends to decline in old age.
5. The majority of old people feel miserable most of the time.
6. Physical strength tends to decline in old age.
7. More than one third of the aged are living in long-term institutions (such as nursing homes, mental hospitals, homes for the aged, etc.).
8. Aged drivers have fewer accidents per driver than those under age 65.
9. Older workers usually cannot work as effectively as younger workers.
10. One-third of the aged are healthy enough to carry out their normal activities without help.
11. The majority of old people are unable to adapt to change.
12. Old people usually take longer to learn something new.
13. Depression is more frequent among the elderly than among younger people.
14. Older people tend to react slower than younger people.
15. In general, old people tend to be pretty much alike.
16. The majority of old people say they are seldom bored.
17. The majority of old people are socially isolated.
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19. Over 20% of the population are now age 65 or over.
20. The majority of medical practitioners tend to give low priority to the aged.
21. The majority of old people have incomes below the poverty line (as defined by the federal government).
22. The majority of old people are working or would like to have some kind of work to do (including housework and volunteer work).
23. Old people tend to become more religious as they age.
24. The majority of old people say they are seldom isolated or angry.
25. The health and economic status of old people will be about the same or worse in the year 2010 (compared with younger people).

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Objective

Define the roles and responsibilities of a conservator

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Introduction: Conservatorship Defined

Conservatorship: a conservatorship is a **court proceeding** where an adult is appointed the responsible party over another adult who is **unable to care for himself or his finances**.

Conservator: The person who is **court-appointed** to manage the person's care/estate for an adult who is unable to care for himself.

Conservatee: The incapacitated adult who **receives** services through the conservatorship

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TYPES OF CONSERVATORSHIP

- Mental Health Conservatorship- also known as Lanterman-Petris Short (LPS) conservatorship: established for persons with serious mental illnesses who require involuntary treatment. Only designated facilities and courts can initiate the process.
- **Probate Conservatorship:** for the protection of frail vulnerable elderly and dependent adults. Any interested party can initiate the process.

NOTE: This training program is only for probate conservatorships.

• 9

Types of Conservators

- A "General Conservatorship" is one where the conservator is appointed over both the person AND the estate.
- A "Limited Conservatorship" is where the conservator is only appointed certain rights to care for an adult who has a developmental disability.

• 10

Types of Conservator (cont.)

- **Conservator of the Person:** The conservator of the person is in charge of the medical health of the conservatee. The conservator is to ensure he or she is receiving the appropriate care and individualized treatment.
- **Conservator of the Estate:** The conservator of the estate is in charge of managing all financial decisions for the conservatee. This also includes property management

• 11

Los Angeles Office of the Public Guardian

Public Guardian vs. Deputy Public Guardian

The **Public Guardian** is the head of the Office of the Public Guardian. In Los Angeles County, it is the Director of Mental Health, Dr. Sherin. A **Deputy Public Guardian** is a Public Guardian (conservator) who was deputized by the Public Guardian to work on behalf of him.

• 12

Public vs. Private

Public Conservator vs. Private Conservator

A **private conservator** is someone who is hired to take on the role of conservator. This happens when there is a large amount of assets involved in a client's estate. A **public conservator** is appointed when there is no viable alternative to the establishment of conservatorship. A public conservator is the LAST RESORT.

• #13

What does conservatorship do?

- Shift of responsibility
 - Person care
 - Financial responsibility
- Imposes limitations on conservatee
 - Cannot enter financial contracts
 - (Typically) cannot drive
 - Decide where to live
 - Consent to medical procedures
- Provides the most protection for the conservatee's interests.
 - Decisions are decided based on the benefits of the conservatee.
 - The benefits will outweigh the risks.

• #14

Major Powers

- Placement
 - The conservator has the authority to move a conservatee out of his or her home if it is deemed no longer safe to live at home, and there are no funds to pay for in-home caregiving.
 - The conservator, with "dementia powers" is able to move a conservatee to a secured facility if he/she is at risk of wandering or leaving the facility.
 - "Least restrictive setting required"
- Manage finances
 - Conservators manage the conservatee's accounts and finances.
- Make medical decisions
 - Conservators provide medical consent to procedures small and large.
 - "Dementia Powers"- Authority to consent for secured placement due to dementia diagnosis. Authority to consent to psychotropic medications ONLY for the treatment of dementia.

Major Powers

CONSERVATORSHIP OF (NAME) CONSERVATEE	CASE NUMBER
LETTERS OF CONSERVATORSHIP <input type="checkbox"/> Person <input type="checkbox"/> Estate <input type="checkbox"/> Limited Conservatorship	
1. <input type="checkbox"/> (Name): _____ is the appointed conservator <input type="checkbox"/> limited conservator of the <input type="checkbox"/> person <input type="checkbox"/> estate of (name) _____ 2. <input type="checkbox"/> (For conservatorship that was on December 31, 1993, a guardianship of an adult or of the person of a married minor) (Name): _____ was appointed the guardian of the <input type="checkbox"/> person <input type="checkbox"/> estate by order dated _____ (specify) _____ of (name) _____ and is now the conservator of the <input type="checkbox"/> person <input type="checkbox"/> estate of (name) _____ 3. <input type="checkbox"/> Other powers have been granted or conditions imposed as follows: a. <input type="checkbox"/> Exclusive authority to give consent for and to require the conservatee to receive medical treatment that the conservator in good faith based on medical advice determines to be necessary even if the conservatee objects, subject to the limitations stated in Probate Code section 2356. (1) <input type="checkbox"/> This treatment shall be performed by an accredited practitioner of the religion whose tenets and practices call for reliance on prayer alone for healing of which the conservatee was an adherent prior to the establishment of the conservatorship. (If court order limits duration) This medical authority terminates on (date) _____ b. <input type="checkbox"/> Authority to place the conservatee in a care or nursing facility described in Probate Code section 2356.5(b). c. <input type="checkbox"/> Authority to authorize the administration of medications appropriate for the care and treatment of dementia described in code section 2356.5(c). (Powers to be exercised independently under Probate Code section 2350 are specified in Attachment 3d (specify powers, restrictions, conditions, and limitations).) d. <input type="checkbox"/> Conditions relating to the care and custody of property under Probate Code section 2402 are specified in Attachment 3e. f. <input type="checkbox"/> Conditions relating to the care, treatment, education, and welfare of the conservatee under Probate Code section 2358 are specified in Attachment 3f.	FOR COURT USE ONLY

Paperwork

- As a conservator, you receive all mail for conservatee (bills, admission packet for facility, statements of financial account, etc.)
- In addition to the mail received, conservators deal with legal documents.
- Conservators must be trained to read all legal documents in order to understand how to process them as needed.

•

• 17

Objective

Explain the legal
process of
conservatorship

•

• 18

How is Probate Conservatorship established?

- A person who has been deemed to lack the capacity to care for himself/herself or his/her finances.
- There needs to be no other suitable alternative
- Probate Investigating deputy will submit a report indicating the conservatorship is necessary.
- County Counsel will submit petition
- Court will appoint a private volunteer panel attorney (PVP) to represent conservatee.
- Client may or may not attend the court hearing
- Judge will decide whether conservatorship should be appointed
- Referral received by anyone in the community.

• 19

Court Documents:

- Letters of Conservatorship
- Referral for Probate Conservatorship
- Capacity Declaration
- Inventory and Appraisal
- Notification of Death

• 20

Capacity Declaration

The image shows a 'Capacity Declaration' form. A red box highlights a section in the top right corner. The form contains several sections with checkboxes and text, including a table with columns for 'Item', 'Quantity', and 'Unit'. The highlighted section appears to be a declaration of capacity or a specific item's status.

Inventory and Appraisal

The image shows an 'Inventory and Appraisal' form. A red box highlights a section in the top right corner. The form contains several sections with checkboxes and text, including a table with columns for 'Item', 'Quantity', and 'Unit'. The highlighted section appears to be a declaration of inventory or a specific item's status.

Notification of Death

NOTIFICATION OF DEATH OF CONSERVATEE OR BENEFITARY

1. I declare to be true:
 the position the status for the position mentioned
if the conservator other _____
is the actual possessor.

2. The conservatorship shall be _____ day.

3. Board of Services of the Department of State will coordinate or there is another agency providing services for the State's Department of State, 111 South Hill Street, Tallahassee, FL 32301, and its all associated parties.

I declare under penalty of perjury under the laws of the State of Florida that the foregoing is true and correct.

Conservator or Beneficiary _____
Signature (Print Name of Conservator or Beneficiary)

Date _____
Notification of Death of Conservatee or Beneficiary
FD-203 (Rev. 10-1-10)

•25

Objective

Describe the aging process and health status of the conservatees

•26

Who are our conservatees?

A typical conservatee is an older adult (65+ years), who has limited resources, in need of financial assistance, or assistance with his/her medical care.

- Various race- there is a wide array of racial and ethnic backgrounds among conservatees of Los Angeles Office of the Public Guardian
- Various income- conservatees do not need to meet an income requirement. Although most conservatees have limited resources, some conservatees have large estates
- Medical- While some conservatees require total care, some conservatees can take care of their own activities of daily living.

•27

The Aging Process

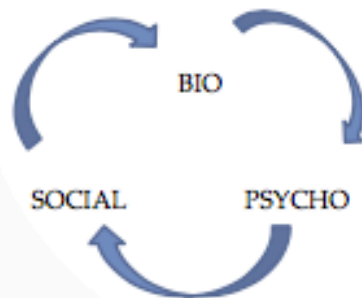
The aging process causes changes in various aspects:

- **Biological**
 - Susceptibility to disease
 - Frail Bones
- **Physiological**
 - Chronic illnesses
 - Limitation of physical ability
- **Environmental**
 - Living arrangement might have changed
- **Psychological**
 - Dementia
 - Forgetfulness
- **Behavioral**
 - Unable to control moods
 - Depression
 - Anxiety
- **Social**
 - Limited socialization
 - Loss of a spouse

•28

Bio-Psycho-Social Model

This model sets out to show that changes in any and all of these aspects (biology, psychology, and social) can lead to further changes indirectly



• 29

Common Health Issues

- Dementia/ Mild Cognitive Impairment
 - Alzheimer's Disease
 - Vascular dementia
- Diabetes
 - Type I
 - Type II
- Heart Disease
 - Hypertension
 - Stroke
 - Chronic Obstructive Pulmonary Disease
- Pneumonia
- Urinary Tract Infection

• 30

Dementia (mild cognitive impairment)

- Dementia is a general term that describes a range of symptoms associated with a decline in memory or other thinking skills severe enough to reduce a person's ability to perform everyday activities.
- Symptoms include:
 - Memory Loss
 - Communication and language impairment
 - Impaired ability to focus and pay attention
 - Impaired reasoning and judgment
 - Impaired visual perception

• #31

Types of Dementia

Alzheimer's Disease

The most common cause of dementia, accounts for 60-80% of cases.

Dementia: Neurons in parts of the brain involved in cognitive function have been damaged or destroyed.

With Alzheimer's Disease: neurons in OTHER parts of the brain are eventually damaged or destroyed as well, such as those that control our basic bodily functions.

Alzheimer's Disease is DEGENERATIVE. It cannot be prevented, slowed, or cured. It will ultimately lead to death as the patient continues to decline. People in the end stage require around-the-clock care and are bed-bound.

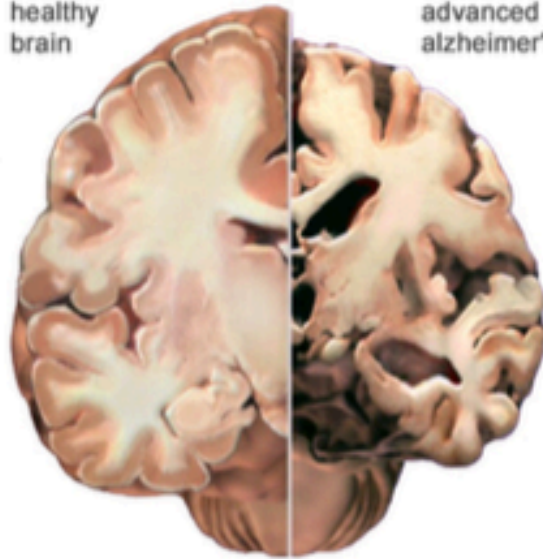
Dementia is the common characteristic of conservatees.

• #32

Alzheimer's Disease

healthy
brain

advanced
alzheimer's



• 33

Types of Dementia

Vascular Dementia

Previously known as "multi-infarct" or "post-stroke" dementia

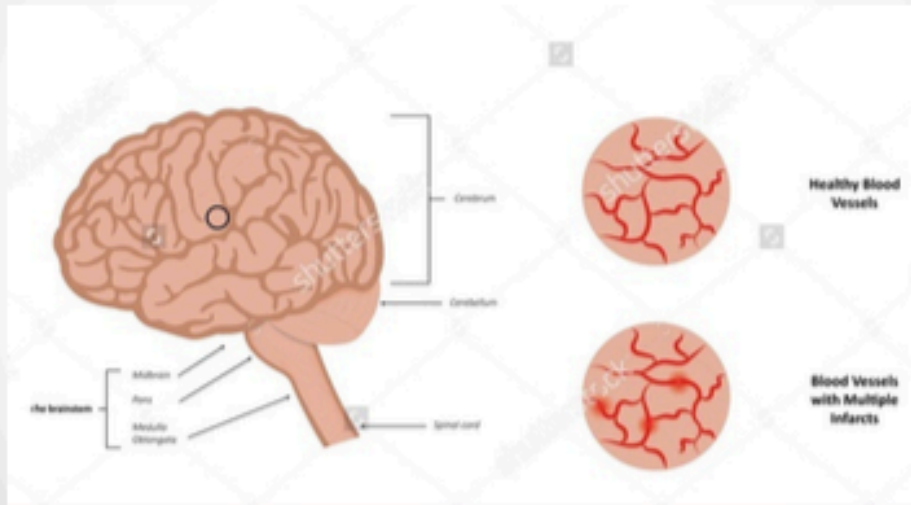
Vascular dementia only accounts for only about 10% of dementia cases.

Prominent symptom: Impaired judgment, inability to make decisions, or organize and make plans for the future. Also, these clients have difficulty with motor function (gait and balance.)

Vascular dementia is caused from conditions that damage the brain's blood vessels, constricting their ability to supply the brain with amounts of nutrition and oxygen it needs to perform though processes effectively.

• 34

Vascular Dementia



• 35

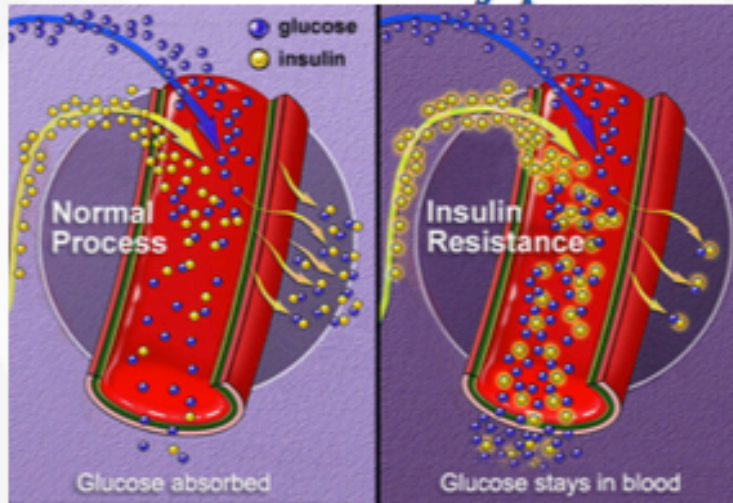
Diabetes

According to American Diabetes Association, in 2015 30.3 million Americans had diabetes. 12 million (diagnosed and undiagnosed) seniors, aged 65+, were suffering from diabetes.

- **TYPE 1**
 - Usually diagnosed in childhood or early adult years
 - The body does not produce insulin → without insulin, cells cannot absorb sugar, which is needed for energy.
 - Treated with insulin.
- **TYPE 2 (Most Common)**
 - This can be diagnosed at any age
 - The body does not use insulin properly. This form is often referred as "insulin resistance." At first, the pancreas makes extra insulin to make up for it, but eventually, it cannot keep up and there isn't enough to keep blood glucose at a normal level.
 - Treated with lifestyle changes, oral medication, and insulin.

• 36

Diabetes- Type 2



• 37

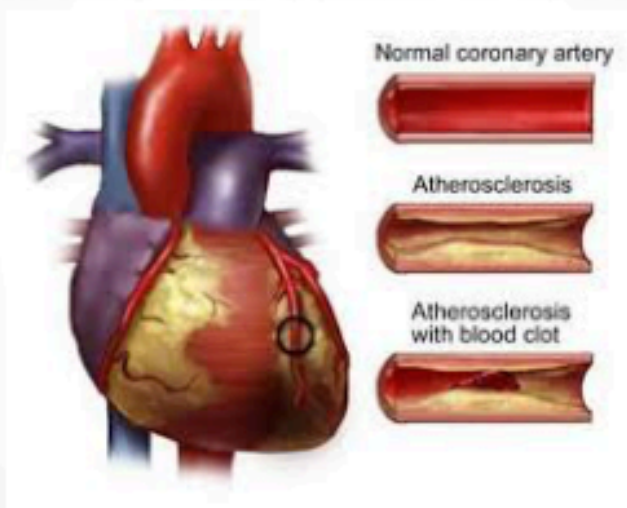
Cardiovascular Disease

(interchangeable with "heart disease")

- Damage to the heart or blood vessels by atherosclerosis, a buildup of fatty plaques in the arteries. Plaque buildup thickens and stiffens artery walls, which can inhibit blood flow through the arteries to organs and tissues
- Associated with conditions such as heart attacks, chest pain, and strokes.
- Treatment:
 - Lifestyle changes: Diet (low-fat and low-sodium), exercise, no smoking
 - Medications
 - Medical procedures or surgery

• 38

Cardiovascular Disease



• 39

Limited Abilities

- Incontinent of Bowel and Bladder
- Ambulatory Ability
- Loss of five senses
- Activities of Daily Living (ADLs) are sometimes limited by the conservatee's mental and physical diagnoses.
 - Dressing
 - Eating
 - Bathing
 - Toileting

• 40

Advanced Healthcare Directives

Definition: a legal document in which a person specifies what actions should be taken for their health if they are no longer able to make decisions for themselves because of illness or incapacitation.

- Most conservatees do not enter a conservatorship with completed advanced directives, specifically indicating their end of life choices.

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•41

End of Life Decisions

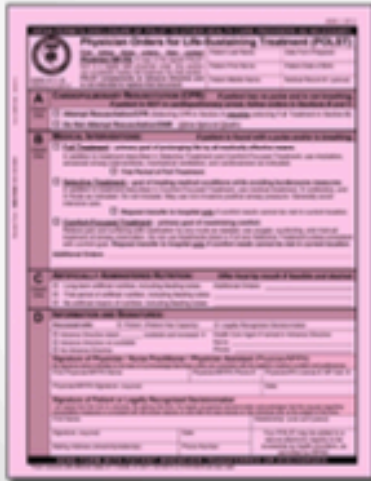
As a person's health continues to decline, a doctor may request to change the plan of care for the conservatee. This can be a change in code status, or the withdrawal or withholding of certain medical treatments. When a person does not have an advanced directive or a completed POLST form, it is left to the conservator to make these end of life decisions. This is a **BIG** responsibility, so there is a specific process in the office to make these changes to a conservatee's care plan

•

•42

POLST

Physician Orders for Life Sustaining Treatment

A sample POLST form with a pink border. The form is titled "Physician Orders for Life Sustaining Treatment (POLST)" and includes sections for patient information, physician orders, and patient preferences. The form is divided into several sections, each with a lettered header (A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z). The form is currently blank, with only the headers and some text visible.

- DNR
 - Do Not Resuscitate (No CPR)
- Comfort Measures
 - Limited intervention in healthcare
 - Provide, Withhold, or Withdrawal
- Hospice
 - Comfort care
 - Pain management

• 43

End of Life Request Forms

- Forms from LAOPG would be shown here***

• 44

Objective

Exemplify estate management of conservatee's finances and benefits

• #45

Estate Management

Managing the conservatee's benefits and ensuring they are receiving all income and benefits they are entitled to:

- Social Security (SSA) benefits
- Supplemental Security Income (SSI) benefits
- Retirement/Pension
- Veterans Administration Pension

All benefits will go into conservatee's estate at the Office of the Public Guardian.

• #46

Bank Accounts

- Some conservatees have saving accounts, life insurances, annuities, etc. It is important that we are aware of all accounts (in all banks) open under the conservatee's name.
- Accounts are marshalled and put in an account with the Office of the Public Guardian.
- Large accounts with high interest rates are often kept in the bank, with the letters of conservatorship on the account. Funds will be collected when needed with management and court approval.

• 47

Property Management

Conservatees, sometimes, enter a conservatorship with real property. There are different situations in which the property is handled.

- **Client lives in house:** There will be a real property manager assigned by Public Administrator's office to assess and manage the property. PG office will ensure bills are paid and client remains appropriate to live in their own home.
- **Client lives in facility and will not return:** The house will be drayed, and belongings will be placed in LA County storage. PG office will request for court authority for house to be sold.

• 48

Property Management (Cont'd.)

- **Client is in facility but will return back home:** A Real Property manager will be assigned to assess and manage the real property. PG will ensure the property is modified, if needed, to meet the clients needs to return home.
- **Other issues encountered:**
 - Reverse mortgage
 - Abandonment of property

• 49

Personal Property

If a conservatee enters conservatorship with personal belongings, all items are inventoried and appraised. Disposition of items is based on the item and the location of the conservatee.

- **Client living in their own home:** Items are inventoried and appraised. Vehicles will be collected. Cursory will be conducted to collect important documents and determine whether any items need to be placed in storage for safekeeping.
- **Client living at facility (who has a home):** Deputy will be sent out to the home for cursory to collect important documents/ valuable items. It will be determined whether items are appropriate to collect and store for later disposition (sale)/ distribution (if conservatee has a will).

• 50

Personal Property (Cont'd)

- **If client lives at facility:** It will be determined whether a cursory is needed. Deputy will request for facility to provide inventory of client's belongings.

Disposition of personal property:

- Clothing will be given to client if there is room at facility.
- Photos will be released to client if there is room at facility. If not, family will be contacted for photos to be released to them.
- Cars, furniture, jewelry, miscellaneous items: If needed, items will be petitioned to be sold to produce funds for the client's estate.

•

•51

Funds spent

In addition to the collection of funds, personal property and/or real property, the conservator is also responsible for issuing payment for the conservatee.

- Rent
- Care payments
- Personal needs money
- Court-approved fees
- Utilities
- Clothing
- Medical expenses
- Insurance (medical and real property)
- Taxes (income and real property)

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•52

End of Life

Most probate conservatorships managed by Los Angeles Office of the Public Guardian will terminate due to the death of the conservatee. It is our job to preplan for the day the conservatee passes away.

Do they have an existing pre-need?

-If yes: Keep a copy of the contract available for when the conservatee passes

-If no: If there are funds available, purchase a pre-need.

-If no funds available, conservatee's remains will be sent for county disposition.

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#53

End of Life 9 (cont'd.)

When the conservatee passes away, the conservator is responsible to...

- Notify all known family members.
- Notify all interested parties.
 - Social Security, Medi-cal, DMV, Veteran's Affairs, Department of Healthcare Services
- Call the mortuary to carry out arrangements.
- Call morgue if no arrangements.

•

#54

Shadow Training

Meet with seasoned Deputy to complete 4 hours of shadow training to complete daily in-office tasks.

•

#55

DAY TWO PERIODIC VISITS

•

#56

Objective

Summarize periodic visits (conservator-conservatee interaction)

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•57

Periodic Visits

- Periodic Visits are **face-to-face** encounters with the conservatee to follow up with the health and well-being of the client and to ensure their needs are being met.
- You go wherever the client is
- Each client must be seen on a quarterly basis
- Documentation is collected after every periodic visit

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•58

Words of Advice

- Do not see the conservatee first.
- Before you see the conservatee, stop at the nurse station to speak with the charge nurse AND review the chart.
- See the conservatee in an open area that allows staff assistance, if needed, especially if there is a history of physical outbursts.
- In addition to being aware of conservatees behaviors, be mindful of other residents.

• 59

Facilities

- Acute Hospital
- Skilled Nursing Facility
- Assisted Living Facility
- Board and Care
- Personal Residence
- Jail
- State Hospitals
- Institution for Mental Disease (IMD)

• 60

Skilled Nursing Facility



• 61

Skilled Nursing Facility

This is the first level of care that is licensed to administer medical treatment with nurses. There are strict regulations, requiring a specific nurse: patient ratio.

SHORT TERM: Patients who are admitted due to an acute condition that requires additional care after the hospital, such as physical therapy after breaking a hip, or IV antibiotics to treat an infection.

LONG TERM: "custodial care" Patients who require the treatment capabilities of SNF, but their condition is not expected to improve. Ex: End stage dementia where patient is total care and receive nutrition through G-tube.

• 62

Board and Care



• 63

Board and Care

- A board and care is very similar to an assisted living facility, except they are "regular" homes in residential areas that are equipped, adapted, and staffed to care for a small group of (senior) residents.
- Along with three meals a day, these facilities are able to provide assistance with: **eating, health condition monitoring, grooming/hygiene, medication management, and toileting.**
- Typically houses no more than 20, and no less than 6.
- LICENSCED FACILITIES

• 64

Assisted Living Facility



*65

Assisted Living Facility

- An assisted living facility is a long-term senior housing option that provides personal care support, meals, and medication management. Typically, that is all that is included in a basic rate, other services will be an additional cost (dressing, bathing, transportation.)
- Much larger than a board and care. In some facilities, there are more events and activities that occur in a facility.
- Dementia units (secured) are for older adults who do not require a SNF level of care, but might wander and can be considered AWOL risk.

*66

Residence



•67

Residence

- In some cases, our clients will have real property and are still able to live at home with assistance from a caregiver, family, or friends.
- These cases are closely monitored so that the conservator is aware of any decline to detect when additional care is needed or a possible change in level of care is needed.

•68

What do you check?

One of the key tools to review on periodic visits is the medical chart available at most facilities containing the patients medical records.

- When did they last see the doctor?
 - Are they seen weekly? Monthly? Make sure they are seen by the doctor in a timely manner that is appropriate to the conservatee.
- Any major issues? Changes in care plan?
 - Any falls? Any changes in condition? Behavioral issues. It is important to ask about any changes before you see the conservatee so you know what you are walking into. Ex. If a person has been exhibiting behavioral issues and striking out at staff, you want to know so you can be alert to behaviors.
- What medications are they currently taking?
 - Always have an updated medication list with all current medications.

• 69

What to be aware of?

- **Physical appearance:** Does the conservatee look well groomed and appropriately dressed? If they are connected to any machines, is the medical equipment clean? Do they have any bruises or injuries?
- **Mental appearance:** Does the conservatee look like they are being over-medicated? Does he appear agitated?
- **Belongings:** Check their closet to ensure their clothing is in their closet. Ensure that items that you order are being given to the conservatee and not other residents.

• 70

Speaking with the Conservatee

- Always greet them. If you have never met, introduce yourself. If you already met, remind them who you are, it's possible they don't remember you.
 - What if they are nonverbal? Even if the conservatee is nonverbal, you ALWAYS greet the conservatee and let them know who you are and why you are there.
- Ask how they are feeling: physically and mentally.
 - Ask whether the staff is aware of the way they are feeling. If they have an issue (rash, pain, etc.) relay the information to the staff so they can be treated. If they are feeling depressed or suicidal, let the staff know.
- Ask whether they need anything.
 - Clothing, personal items, spending money.
- Ask whether they have any comments/questions/concerns.
 - Questions regarding the conservatorship? Concerns regarding the staff and how they are treated.

• 71

Who do you interact with?

During these Periodic Visits, you will meet many staff members in facilities. There are key players that you need to build a rapport with:

- Business office manager
 - You will interact with him/her to ensure that care/rent is current and there are no outstanding balances. Also ensure that there are appropriate funds for the conservatee's needs.
- Social worker/ Activities director
 - You will interact with him or her to inquire whether the conservatee needs any clothes. He or she would also know whether the conservatee interacts with any facility activities.
- Charge nurse/ Med-tech
 - He/she will be able to inform you of any changes in care or behavioral issues.
- Administrator
 - You might not interact frequently with the him/her, but it is important to introduce yourself if the opportunity arises.

• 72

What next?

- After gathering all of this information from the conservatee, the chart, and the staff members, take the information you collected and document it into the online system at The Office of the Public Guardian.
- This information is kept throughout the conservatorship. Periodic visits help document the clients health and well-being.

• 73

Shadow Training

Meet with seasoned Deputy to complete 4 hours of shadow training out in the field.

• 74

APPENDIX D

NOTES FOR POWERPOINT CURRICULUM

Slide 1: The Los Angeles County, Office of the Public Guardian was established in 1945. First in the state of California. Started out for people committed to psych facilities, after Lanterman-Petris Short Act of 1969 and changes to Probate Code, Public Guardian became substitute decision maker for vulnerable population.

Slide 6: Key to Correct Answers: All the odd-numbered items are false, and all the even numbers are true.

Slide 8: Emphasize that this program is only concerning probate conservatorships.

Slide 9: In a limited conservatorship, powers might be limited to things like signing a contract or managing finances. Usually conservatorship would be through the regional center, which would manage the person, and Public Guardian would manage the estate.

Slide 11: One person vs. multiple people

Slide 13: County Counsel is the attorney representing Los Angeles County.

Slide 14: Other limitations of the conservatee are the ability to own a firearm. Sometimes, they are not allowed to vote (this can be changed).

Slide 15: **Manage finances-** Most bank accounts will be collected and put into an account open in the office, under their estate number. Some investments accounts are left in financial institutions when there is a high interest rate. The letters of conservatorship are placed on the account and Public Guardian will decide when funds are to be collected, with the court's approval.

Make medical decisions- Example: flu vaccine, Gastronomy tube (G-tube) placement, Peripherally Inserted Central Catheter (PICC) line placement, amputations, and, sometimes, end of life decisions. Common Dementia Medications: Aricept, Namenda, Exelon are all common medications taken by conservatees with Dementia.

Slide 17: Examples of legal documents signed: deeds/title reports, wills, trusts, medical records, Physician Orders for Life Sustaining Treatment (POLST) forms, Liens, etc.

Slide 24: One thing that deserves to be mentioned is that there is a WIDE array of conservatees. Dementia does not discriminate. There are conservatees who lived well, were successful, had family, and are now left incapacitated, with no family to help, and are on conservatorship. Conservatorship is not just for people who have no money and no family.

Slide 26: Example: Older woman breaks hip (BIOLOGICAL LIMITATION). Woman is sent to skilled nursing facility to receive therapy. Woman cannot go out to see family or friends (SOCIAL LIMITATION). Woman becomes depressed do to feelings of loneliness and hopelessness towards recovery (PSYCHOLOGICAL CHANGE).

Slide 44: All real properties are insured, property taxes are paid, and a property manager maintains the home.

Slide 46: Documents and valuable items: Cash, credit cards, ATM card, check books, wills, death certificates, trust documents, birth certificates, DD214, jewelry, photos, address books, glasses, dentures, etc.

Slide 57: **Secured SNF**: a skilled nursing facility that is for patients who wander and are at risk of AWOL. These tend to be patients with more mental health diagnoses and are a little more physically capable to get up and leave the facility. This requires a code or combination to get out of the unit, you cannot just walk out.

Open SNF: Typical SNF where you can come in and out. Patients are not forced to stay inside, but there is less risk that these patients will AWOL, due to their physical health, or their mental capacity. They do not care to leave the facility.

Slide 65: Be observant: Notice of their teeth may need attention. Anxiety, losing/gaining weight. Do they smell, are they malodorous? Do they need new shoes or clothing? Are they in need of a wheelchair, cane, dentures, hearing aide, etc.?

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