

# **The Association for Conflict Resolution**

## **GUIDELINES FOR ELDERCARE COORDINATION**



**Association for  
Conflict Resolution**

VOICES, CHOICES, SOLUTIONS

**Developed by the ACR Task Force on Eldercare Coordination**

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**Association for Conflict Resolution Task Force  
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**GUIDELINES FOR ELDERCARING COORDINATORS**

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**Association For Conflict Resolution  
Task Force On Eldercaring Coordination**

**GUIDELINES FOR ELDERCARING COORDINATION**

**FOREWORD**

The Association for Conflict Resolution Task Force (“ACR Task Force”) envisions the use of “eldercaring coordination,” as an application of the “coordination” process to guardianship/probate cases in which high conflict family dynamics interfere with the wellbeing and safety of the elder, limit adherence to court orders, impede court processes, and detract from the efficacy of guardianship and other appointments by the court. Since parenting coordination has been established as a viable dispute resolution option for high conflict cases, the Association for Conflict Resolution (ACR) Task Force on Eldercaring Coordination (“ACR Task Force”) used the process of “parenting coordination” as a model to develop a “coordination” process specific to the unique needs of elders. These guidelines will address the current discrepancy between dispute resolution options available for high conflict parents dealing with young children and high conflict cases regarding an elder’s needs, care and safety. Although courts recognize both children and elders as vulnerable populations, there is currently no option for dispute resolution for parties involved in high conflict cases regarding elders.

The Association of Family and Conciliation Courts (“AFCC”) was instrumental in the development of parenting coordination, a dispute resolution process to assist high conflict parents and children involved in family court actions, currently utilized throughout the United States, Canada and other countries. Learning from the processes that led to the development of parenting coordination, in 2012 Linda Fieldstone, former President of AFCC and AFCC Task Force on Parenting Coordination secretary, approached Sue Bronson, Co-Chair of the ACR Elder Section to explore the utilization of this process in cases involving elders. ACR leadership was aware that the potential benefits for parties and the court would become even more relevant since the number of baby boomers reaching 65 years of age will double from 2008 to 2030. They believed that this project forwarded their mission to “give voice to the choices for quality conflict resolution.” Thus, the ACR Task Force on Eldercaring Coordination was created in January 2013 with the following mission:

To develop a dispute resolution option specifically for high conflict cases involving issues related to the care and safety of elders in order to complement and enhance, not replace, other services such as provision of legal information or legal representation, individual/family therapy, medical, psychological or psychiatric evaluation or mediation.

Eldercaring coordination focuses on improving relationship dynamics so that the elder, family, and others in supportive roles can better collaborate with the professionals able to help them make the onslaught tough decisions ahead and support each other during times of transition.

The Task Force was composed of representatives from the following entities:

Alternative Dispute Resolution Institute of Canada  
American Association for Marriage and Family Therapy  
American Bar Association Commission on Law and Aging  
American Bar Association Dispute Resolution Section  
American Psychological Association  
Association of American Retired Persons  
Association of Conflict Resolution  
Association of Family and Conciliation Courts  
Elder Justice Coalition  
Florida Chapter of the Association of Family and Conciliation Courts  
National Academy of Elder Law Attorneys  
National Association of Professional Geriatric Care Managers  
National Adult Protective Services Association  
National Association of Area Agencies on Aging  
National Association of Social Workers  
National Center for State Courts  
National College of Probate Judges  
National Committee on the Prevention of Elder Abuse  
National Council of Juvenile and Family Court Judges  
National Guardianship Association  
National Guardianship Network

The representatives composing the ACR Task Force (2014-2015) were: Co-Chairs Sue Bronson, and Linda Fieldstone, Joan Braun, Georgia Anetzberger, Annice Davis-White, Andrew Capehart, Chrisite Coates, Resa Eisen, Amy Gourlay, Julie Gray, Trudy Gregorie, Kim Grier, Chris Herman, Michelle Hollister, Sally Hurme, Michael, Kirkland, Sandy Markwood, Hon. Sandy Karlan, Karen Largent, Linda Oxford, Meredith Ponder, Mary Joy Quinn, Jessica Singer, Matt Sullivan, Brenda Uekert, Erica Wood, Hon. Mike Wood, Martin Zehr and Zena Zumeta.

An Advisory Committee, composed of national experts in relevant fields, was created to answer targeted questions, review work product, join Task Force Committees and provide additional assistance upon request. Support was also received by the *Collaborate* joint American Bar Association and Elder Section of the ACR and AFCC Parenting Coordination Listserve as well.

Additionally, concurrent with the establishment of the ACR Task Force, the Florida Chapter of AFCC created its own Task Force on Eldercaring Coordination, composed of statewide entities (endnote), with the same mission and similar work product goals and stages. The two Task Forces worked collaboratively during Stage One of this project, with the ACR Task Force focused more generally to provide over-arching advice and an umbrella version of practice guidelines and the FLAFCC Task Force demonstrating how a state may apply those recommendations to their specific needs and characteristics. Accordingly, the work of each Task Force was elevated and educated through the efforts of the other.

The objectives of this project include:

1. developing a discussion amongst stakeholders (organizations and associations, professional, court, collaterals) regarding the application of a “coordination” process (i.e. eldercaring coordination) to high conflict family dynamics when elders are an issue;

2. using existing and facilitating new research to study the implications of eldercaring coordination as a vehicle for high conflict management and the resolution of disputes regarding eldercare issues;
3. exploring the ethical challenges and considerations in applying concepts used in the coordination of parents with minor children to the elder population and existing legal frameworks for elders;
4. creating the process of eldercaring coordination to best address high conflict family dynamics when eldercare is an issue;
5. developing guidelines, including training and qualifications, for professionals practicing this dispute resolution process for elders (i.e. eldercaring coordination);
6. creating a possible court program to refer parties for eldercaring coordination in high conflict cases, including eldercaring coordination project assessment tool;
7. encouraging interdivisional collaboration between court divisions to conserve resources by utilizing them for families of all ages and life stages;
8. enhancing the definition of “family” in the court to include the range of family dynamics and needs throughout the years;
9. expanding the use of “coordination” as a dispute resolution method to address high conflict cases involving various situations and issues.

Both the ACR Task Force and FLAFCC Task Force projects were divided into three stages:

- Stage One: to complete a work product which includes a definition for eldercaring coordination, qualifications, ethical guidelines and training protocol, grievance process, a template for Court ElderCaring Coordination Project Proposal, and project evaluation component;
- Stage Two: to disseminate the work product to the court, professionals and the public; to develop and facilitate a model training program for ElderCaring Coordinators; to develop and facilitate a train the ElderCaring Coordinator training program; to assist with the integration of the Court Pilot Project in circuits and jurisdictions, seek sources of funding, including grant opportunities, and implement an assessment component for those cases entering into the process;
- Stage Three: to reassess the work product for improvements, revise work product and disseminate the results.

In order to develop this new coordination field responsibly and ensure the well-being and safety of the elder, the ACR Task Force developed the following, included herein:

1. Ethical Guidelines for ElderCaring Coordination
2. Recommended Complaints Procedure
3. ElderCaring Coordination Training Guidelines and Protocols
4. Court Rule Proposal Template, including standardized forms
5. ElderCaring Coordination Project Assessment Tool/Pre- and Post Surveys for Elders, other participants and the ElderCaring Coordinator

The success of this project will be assessed by:

- Reduction in hearings before the court in cases referred to eldercaring coordination;
- Review of ElderCaring Coordination Survey given to the participants in eldercaring coordination;
- Instances of reports of elder abuse, neglect and exploitation;

- Increased use of community resources (e.g. physicians, attorneys, guardians, elder mediators, health care, psychosocial and financial experts, etc.) to assist the elder/incapacitated and family;
- Development of a project design that can be replicated statewide and nationally by other circuits interested in pursuing these project goals and objectives.

## **GUIDELINES FOR ELDERCARING COORDINATION**

### **OVERVIEW AND DEFINITION OF ELDERCARING COORDINATION**

Eldercaring coordination will focus on reducing conflict and court involvement so the elder and family members and other participants are able to focus productively on the issues related to the needs and safety of the elder and to work collaboratively with others in the support network that provide legal advice, guidance and care.

The process of eldercaring coordination has been developed to:

- Help manage high-conflict family dynamics so that the elder, family, and stakeholders can address their non-legal issues independently from the court;
- Ready the elder and family to work with others in their support network to address the care and needs of the elder, avoiding delays and resulting in better decisions;
- Promote the self-determination of the elder to the extent of his or her ability as fully as possible;
- Promote safety by monitoring situations at high risk for abuse or neglect;
- Provide a support system for the elder and family during times of transition; and
- Free precious judicial time by addressing matters for which other dispute resolution processes have been unavailable or have been ineffective.

#### **Definition of Eldercaring Coordination:**

Eldercaring coordination is a dispute resolution process during which an Eldercaring Coordinator assists elders, legally authorized decision makers, and others who participate by court order or invitation, to resolve disputes with high conflict levels that impact the elder's autonomy and safety by:

- Enabling more effective communication, negotiation and problem-solving skills;
- Offering education about elder care resources;
- Facilitating the creation and implementation of an elder care plan;
- Making recommendations for resolutions; and
- Making decisions within the scope of a court order or with the parties' prior approval.

Eldercaring Coordinators have varied professional backgrounds including jurisprudence, social work, psychology, marriage and family therapy, mediation, parenting coordination, and geriatric care management, but share an expertise in helping elders and families resolve high-conflict disputes involving issues related to the care and needs of elders. Since the role of the Eldercaring Coordinator may include decision-making authority for how the resolution to a conflict is addressed, it is crucial that the court appoint only those professionals who are qualified. These

professionals would have training to ensure best practices are maintained, including the use of ongoing screening regarding the elder's understanding of the process, the elder's safety, and the possibility of abuse, neglect, coercion, fraud and exploitation.

### **Qualifications of Eldercaring Coordinators:**

1. An Eldercaring Coordinator shall be licensed or certified by a regulatory body of a jurisdiction, state or province, with at least a master's degree and the following:
  - a. Completion of family mediation training certified or approved by the circuit, state or province or commensurate with the objectives established by the Association for Conflict Resolution;
  - b. Completion of elder mediation training certified or approved by the circuit, state or province or commensurate with the objectives established by the Association for Conflict Resolution;
  - c. Completion of eldercaring coordination training certified or approved by the circuit, state or province or commensurate with the objectives established by the Association for Conflict Resolution;
  - d. Extensive practical experience in a profession relating to high conflict within families.
2. An Eldercaring Coordinator shall be psychologically and cognitively able to perform the requirements of the Eldercaring Coordinator role; and have no situation, condition, impairment, or disorder that prevents the ethical, responsible and effective exercise of the Eldercaring Coordinator role.
3. An Eldercaring Coordinator must decline a case, discontinue service and immediately report to the court and the parties if any disqualifying circumstances as noted above occur, or if he or she no longer meets the minimum qualifications.

### **Responsible Practice of Eldercaring Coordinator**

The Eldercaring Coordinator's primary responsibility is to the elder. At the same time, the Eldercaring Coordinator must develop and maintain good working relationships with family members and other professionals involved in the elder's care. In addition, the Eldercaring Coordinator supports the well-being and safety of elders within complex systems of public and private social services, legal services, and health care providers. To perform these varied functions, the Eldercaring Coordinator must be trustworthy and accountable to everyone involved in the eldercaring coordination process, and at all times follow the legal and ethical requirements that govern his or her professional practice. The Eldercaring Coordinator should also continue to expand his or her professional knowledge and skills, cultural competence, and strive to understand how the larger societal issues affect elders and families.

The ACR Task Force recognizes that each Eldercaring Coordinator (EC) is guided by the ethical code, practice standards, and scope of practice for her or his respective profession. Therefore, the Task Force has applied the core ethical principles common to most human service professions to the eldercaring coordination role and addressed the following two broad aspects of the ethical practice of eldercaring coordination:

1. Unique considerations in working with the elder population.

## 2. Tasks and functions specific to the role of Eldercaring Coordinator.

These guidelines are aspirational in nature and serve as guidance to courts and programs interested in implementing eldercaring coordination as a viable dispute resolution process for high conflict cases involving elders. Ethical behavior requires more than just avoiding wrong-doing or resolving complaints. These guidelines were developed to help the Eldercaring Coordinator understand and follow relevant ethical principles. Professionals considering becoming or serving as Eldercaring Coordinators can find best practices and ensure their proper training to facilitate the process most effectively. Additionally, the guidelines and training protocols provide quality control and protection for the consumer as they include minimal expectations for conduct and best practices for the Eldercaring Coordinator.

### **FOUNDATIONAL ETHICAL PRINCIPLES OF ELDERCARING COORDINATION**

1. Autonomy – defined as self-determination; respect for elders’ rights and dignity; the right of elders to be self-governing within their family and social system and cultural framework

Every adult has the right to make his or her own life decisions, unless adjudicated by a court to not have the ability to make certain decisions. Even after court adjudication, the adult has the right to be included in the decision making process to the extent of his or her ability. The Eldercaring Coordinator shall promote the self-determination of the elder as fully as possible within the context of the eldercaring coordination process. The Eldercaring Coordinator has a responsibility to assist the elder in articulating his or her goals, needs, and preferences so that these can be incorporated into the plan of care to the greatest extent possible. The Eldercaring Coordinator is aware of potential conflicts that may arise when balancing the benefits and risks of interventions being considered, and shall strive to ensure that the elder’s choices are respected and accommodated as fully as possible.

The Eldercaring Coordinator shall respect the rights and dignity of the elder, and shall strive to balance the elder’s autonomy with the need for protection and safety. Unless an elder’s decision will cause harm to herself or himself or others, the preferences expressed by the elder should be followed even when others, including the Eldercaring Coordinator, do not agree with those decisions.

Regardless of the elder’s decisional capacity, the Eldercaring Coordinator shall involve the elder, to the greatest extent possible, in decisions that impact the elder’s life. The elder should be the primary decision maker in all eldercaring coordination issues, unless a court has appointed a surrogate decision maker. In situations where a surrogate decision maker (such as a guardian or conservator) has been appointed, the Eldercaring Coordinator shall facilitate the ability of elders to make their goals, needs, and preferences known and to have them seriously considered.

If questions regarding the elder’s decisional capacity exist, she or he should be evaluated by a professional who is competent to make that determination, other than the Eldercaring Coordinator. If the elder does not comprehend the factors involved in the decision-making process and, therefore, cannot make an competent decision, the Eldercaring Coordinator shall ensure that all decisions concerning the elder are made by the person(s) with the legal authority to do so, striving to ensure that the elder’s goals, needs, and preferences are represented and that the elder is in the center of the decision making.



The Eldercaring Coordinator shall strive to facilitate clear communication with elders and families, including the use of professional interpreters when needed, to ensure that the elder's goals, needs and preferences are understood and accommodated to the fullest extent possible. Family members or any individual significantly involved in an elder's living situation should not be relied upon to interpret language.

The Eldercaring Coordinator shall promote person-centered service delivery by communicating with the elder to the greatest extent possible. When such communication is limited, the Eldercaring Coordinator shall strive to keep the elder's goals, needs and preferences at the center of the process. The Eldercaring Coordinator shall maintain open, respectful communication with legally authorized decision makers and others participating in the eldercaring coordination process. The Eldercaring Coordinator shall ensure that the specific information needed by the elder and/or designated decision maker to make informed decisions (such as the potential risks and benefits of all options) is presented and understood, that the elder and/or designee consents to services, and that the elder's or designee's right to discontinue services at any time is respected.

2. Beneficence – defined as doing good to others; promoting the well-being of eldercaring coordination participants

The Eldercaring Coordinator has a professional obligation not only to avoid harm to any party in the course of the eldercaring coordination process, but also to conduct the process with close attention to the interests of all parties. The Eldercaring Coordinator shall promote the elder's goals, needs and preferences in such a manner as to maximize the benefit to the elder while avoiding harm to the elder or others.

In situations in which harm could come to others as a result of a contemplated action or decision by the elder, the Eldercaring Coordinator shall take reasonable steps to explain to the elder the risk of harm and shall attempt to mitigate that risk. If this effort is unsuccessful, the Eldercaring Coordinator shall not assist the elder in carrying out a decision or action that poses a threat of substantial harm to the elder or to others.

While the Eldercaring Coordinator shall maintain impartiality in the process of eldercaring coordination, the Eldercaring Coordinator is not neutral regarding the outcome of particular decisions and shall strive for outcomes that promote the well-being and safety of the elder. Impartiality means the freedom from favoritism or bias in word, action, or appearance, and includes a commitment to assist all parties.

3. Collaboration – defined as working together cooperatively in the interest of achieving shared goals

Eldercaring coordination entails collaboration on three levels: between the Eldercaring Coordinator and participants in the eldercaring coordination process, among eldercaring coordination participants, and between the Eldercaring Coordinator and other service providers. The Eldercaring Coordinator shall strive to promote such collaborations on behalf of the elder served. The Eldercaring Coordinator recognizes that misunderstandings, differences of opinion, and lack of communication often underlie conflicts regarding elders' care. Impasses may be reached when an elder's preferences conflict with those of legally authorized decision makers and other eldercaring coordination participants; when decision makers and other participants disagree about the best approach to eldercare; or both. The Eldercaring Coordinator endeavors

to facilitate communication and, if needed, care planning among all participants (including the elder) in the eldercaring coordination process.

The process of eldercaring coordination often involves interdisciplinary and inter-organizational collaboration on behalf of the elder. Thus, the Eldercaring Coordinator may facilitate communication among existing service providers or help participants in the eldercaring coordination process develop relationships with new service providers. In such instances, the Eldercaring Coordinator shares information judiciously and only as authorized, safeguarding confidentiality, privacy, and privileged communications as appropriate.

The Eldercaring Coordinator shall strive to develop and maintain professional and cooperative relationships with all other professionals involved in the eldercaring coordination process. Eldercaring coordination is interdisciplinary in nature and typically involves collateral contacts with other professionals who have knowledge of, or provide services to, the elder or family members. The Eldercaring Coordinator shall strive to develop and maintain collaborative relationships with other professionals who provide services to the elder, including those in the legal, medical, mental health, and social service communities, in the interest of promoting the continuity and effectiveness of the eldercaring coordination process.

4. Professional Competence – defined as possessing the requisite skills, knowledge and ability to provide efficacious services

The practice of eldercaring coordination requires the acquisition and application of specialized knowledge, skill and expertise in dispute resolution/ conflict resolution, dynamics of family systems, aging, and familiarity with legal requirements relevant to eldercaring coordination. The Eldercaring Coordinator also needs to recognize the presence of mental health, cognitive, or other issues affecting the elder's capacity to provide informed consent to participation in the eldercaring coordination process and ability to represent his or her own goals, needs and preferences in that process to ensure his or her care and safety. The Eldercaring Coordinator shall strive to continue to acquire additional specialized knowledge through activities such as continuing education and case-specific consultation. The Eldercaring Coordinator shall also strive to understand legal authorities, terminology, and procedures that affect eldercaring coordination practice.

The Eldercaring Coordinator shall be qualified by education, training, and skills to undertake the eldercaring coordination role and shall continue to develop professionally in the role. Because eldercaring coordination is a complex process involving multidisciplinary areas, the Eldercaring Coordinator must stay abreast not only of developments within her or his profession, but also of a wide range of knowledge relevant to the execution of the Eldercaring Coordinator's role.

If the Eldercaring Coordinator has limited experience or knowledge in the matters which impact a specific case, the Eldercaring Coordinator must be prepared to develop further expertise in order to effectively handle the specific case. Such enhanced expertise may result from consulting other professionals, continuing education, and reviewing treatises and other reference materials. The Eldercaring Coordinator shall request appropriate assistance in the case, decline an appointment, or withdraw from a case, when the facts and circumstances of the case are beyond the Eldercaring Coordinator's skills or expertise and the Eldercaring Coordinator cannot, in a timely manner, develop the specific competency and expertise that is required.

The Eldercaring Coordinator shall be psychologically and cognitively able to perform the requirements of the EC role as noted in minimum requirements above.

5. Fidelity – defined as honoring commitments, keeping promises and respecting the trust placed by eldercaring coordination participants in the service provider

Meeting the duty of fidelity requires far more than simply performing the professional services to which the Eldercaring Coordinator is contractually obligated or for which the Eldercaring Coordinator makes verbal promises. It means recognizing and meeting the responsibilities of the primary profession of the Eldercaring Coordinator, and demonstrating loyalty to the elder involved in the eldercaring coordination process.

The Eldercaring Coordinator shall be trustworthy and dependable in all aspects of both professional and business relationships. The Eldercaring Coordinator shall maintain confidentiality, avoid conflicts of interest, and always pursue the best interests of elders.

The Eldercaring Coordinator shall facilitate the participants' understanding of the eldercaring coordination process so that they can give informed consent to the process.

The Eldercaring Coordinator shall avoid conflicts of interest that interfere with the ability to promote participants' interests and which may result in an actual, apparent, or potential benefit to the Eldercaring Coordinator. Moreover, the Eldercaring Coordinator shall not engage in dual or multiple roles with any eldercaring coordination participant.

6. Integrity – defined as providing services with trustworthiness, veracity, and adherence to professional, ethical, and legal requirements

Integrity means that the Eldercaring Coordinator shall be honest, diligent, and accountable in the provision of service and shall act in a manner consistent with the values reflected in his or her professional ethical code(s). The Eldercaring Coordinator shall be familiar with sources of ethical and professional guidance that may be relevant to the provision of eldercaring coordination services, including, professional practice standards and laws relevant to eldercaring coordination.

Integrity involves both understanding and fulfilling the duties associated with the Eldercaring Coordinator role and abiding by the limitations and scope of the role. The Eldercaring Coordinator shall endeavor to understand the Eldercaring Coordinator role, including sources of authority and appropriate activities, in order to maintain professional boundaries and to avoid incorporating clinical, forensic, or legal practices that are beyond the scope of the Eldercaring Coordinator's role.

7. Justice – defined as non-discrimination; being fair in the treatment of all eldercaring coordination participants; providing appropriate services to all

The Eldercaring Coordinator shall act in a just and fair way in all professional relationships. The EC shall not promote or sanction any form of discrimination based on age, race, ethnicity, family status, gender, gender expression, gender identity, spirituality or religion, sexual orientation, national origin, disability, socioeconomic status or other factors.

The Eldercaring Coordinator shall provide equitable service to all participants in the eldercaring coordination process, without regard either to cultural and linguistic factors or to each participant's financial contribution to the eldercaring coordination process. The Eldercaring Coordinator shall provide a forum for each participant's views while upholding the goals, needs and preferences of the elder.

Throughout the eldercaring coordination process, the Eldercaring Coordinator shall consider how ageism and other forms of social injustice affect elders and eldercare. Such injustice may be manifested in multiple ways, including disregard of elder's goals needs and preferences; economic and health disparities; decreased access to information, resources, and services; and elder abuse or neglect. The Eldercaring Coordinator shall endeavor, within the limits of both the Eldercaring Coordinator's role and her or his professional discipline, to mitigate such injustice. The Eldercaring Coordinator shall promote access to information, resources, and services that may enhance the well-being of the elder and support other eldercaring coordination participants in their caregiving roles.

When disputes pertaining to eldercare arise during the eldercaring coordination process, the Eldercaring Coordinator shall attempt to resolve issues and reduce conflict among all participants—ideally, by reaching agreement—in a timely manner. When participants are unable to reach agreement, and if it has been ordered by the court or authorized by consent, the Eldercaring Coordinator shall decide the disputed issues.

#### 8. Nonmaleficence – defined as avoiding harm to others

The principle of nonmaleficence directs the Eldercaring Coordinator to act in such a way that causes no harm to others. In particular, the Eldercaring Coordinator shall not cause avoidable or intentional harm, and shall avoid subjecting any party in the eldercaring coordination process to unnecessary risk of harm.

Types of harm range from physical and emotional injury to deprivation of property or violations of rights. The experience of harm can be subjective, and situations may arise in which some type of harm seems inevitable. For example, an older person may find it necessary to give up some measure of independence in the interest of maintaining her or his personal safety and security. In such cases, when one harm may be imposed in order to avoid a greater harm, the Eldercaring Coordinator shall strive to choose the lesser of the possible harms. To the extent possible, the Eldercaring Coordinator shall facilitate the elder's choice in such matters, for each elder can best determine which harm seems the "greater" or "lesser" harm for himself or herself.

The Eldercaring Coordinator shall aspire to facilitate healthy environments for elders and constructive relationships between elders, their families, and care providers, while ensuring the safety of all participants in the eldercaring coordination process. If the elder has been abused, the case may present substantial safety risks or power imbalances, and may not be appropriate for eldercaring coordination. The Eldercaring Coordinator shall report all matters of actual, suspected or potential harm to the proper authorities (law enforcement, protective services, etc.) as directed in his or her profession's code of ethics and/or the law of her or his state, province, or jurisdiction.

#### 9. Cultural competence – defined as providing culturally informed and responsive services that accommodate the elder's communication requirements, not simply as cultural awareness and respect

Culture is an "integrated pattern of human behavior that includes thoughts, communications, languages, practices, beliefs, values, customs, courtesies, rituals, manners of interacting and roles, relationships and expected behaviors of a racial, ethnic, religious or social group; and the ability to transmit the above to succeeding generations" (National Center for Cultural Competence, 2006, [nccc.georgetown.edu/documents/pptculture.pdf](http://nccc.georgetown.edu/documents/pptculture.pdf)).

Thus, the Eldercaring Coordinator recognizes that every interaction with elders, other eldercaring coordination participants, and other service providers constitutes a cross-cultural interaction.

Therefore, the Eldercaring Coordinator shall exercise cultural and linguistic competence throughout the eldercaring coordination process, including communicating in a manner that is easily understood by participants in the eldercaring coordination process, using plain language and incorporating professional interpreters, professionally translated materials, and assistive devices as needed. The Eldercaring Coordinator regularly evaluates and, as needed, modifies eldercaring coordination services to enhance cultural and linguistic accessibility and responsiveness to clients.

The Eldercaring Coordinator strives to recognize and respond to relevant sources of professional guidance in regard to multicultural and diversity issues in the provision of eldercaring coordination services. Lack of awareness of these issues may influence the EC's professional judgment and decision-making. The Eldercaring Coordinator shall develop and maintain awareness of, respect for, and responsiveness to the diversity of families' cultural contexts. Specifically, the Eldercaring Coordinator shall consider how factors and personal biases pertaining to age, gender, gender identity, sexual orientation, family status, race, ethnicity, culture, spirituality or religion, disability, language, and socio-economic status influence both the parties' and the Eldercaring Coordinator's values and expectations regarding family dynamics and eldercaring coordination. The Eldercaring Coordinator shall endeavor to understand expectations and behaviors regarding eldercaring practices that are based in frameworks different from their own and to integrate this knowledge into their interventions.

## **APPENDIX A:**

### **COMPLAINTS PROCEDURE REGARDING THE ELDERCARING COORDINATOR'S PROFESSIONAL CONDUCT AND OBJECTIONS TO RECOMMENDATIONS AND DECISION-MAKING**

Participants, the Eldercaring Coordinator and the court all benefit from an established complaints procedure when an Eldercaring Coordinator's conduct, recommendations or decisions are in question. It is crucial that the Eldercaring Coordinator explains the complaints procedure during their intake process of every participant, and that all participants understand the procedures for redress should there be complaints regarding their Eldercaring Coordinator. A well defined complaints procedure can protect the participants as consumers of the service by providing them an opportunity for reparation and can protect the Eldercaring Coordinator from unfounded complaints to licensing and regulatory boards. A structured complaints procedure can also provide a model for the participants to work out their differences less adversarially by encouraging

open and appropriate communication with their Eldercaring Coordinator when possible. Additionally, if the issue is brought to court, at least the parties and the Eldercaring Coordinator will have realistic expectations of the possible outcomes.

Complaints Procedure – defined as protocols to follow when a party or parties have a complaint regarding the Eldercaring Coordinator or the eldercaring coordination process.

An Eldercaring Coordinator shall inform the parties about the complaint procedure before they enter into the eldercaring coordination process:

A party may make a written complaint to an Eldercaring Coordinator regarding the Coordinator's conduct. After a party reviews a written complaint with the Eldercare Coordinator, if the complaint has not been resolved to the party's satisfaction, that party may file a complaint against a court-appointed Eldercaring Coordinator with the court. The complaint must show good cause as to why a hearing regarding the Eldercaring Coordinator's conduct should be scheduled. Following written notice to the Eldercaring Coordinator of the complaint and a hearing at which the Eldercaring Coordinator shall be given the opportunity to respond to the complaint, the court may remove the Eldercaring Coordinator from the case upon a finding of good cause for removal. The court may also appoint a substitute Eldercaring Coordinator. If appropriate after the hearing, the court or party may forward the complaint to any regulatory body that licenses or certifies the Eldercaring Coordinator for further investigation of the allegations in the complaint.

A Step-by-step guide can be provided to the parties as follows:

Any party (or parties) in an eldercaring coordination process with a complaint about the conduct of an Eldercaring Coordinator shall provide a written complaint to the Coordinator. A party who wishes to include an advocate or neutral facilitator in the discussion shall first provide the Eldercaring Coordinator with a written complaint.

- a. If the party or parties are not satisfied with the resolution, they may submit to the presiding judge a written complaint showing good cause, with specific objection to the Eldercaring Coordinator's conduct.
- b. Following notice and a finding of good cause, the judge shall hold a hearing at which the Eldercaring Coordinator will have the opportunity to respond to the complaint. The Eldercaring Coordinator may suspend services temporarily while the complaint is pending.
- c. The judge may remove the Eldercaring Coordinator process, based upon the merit of the complaint and other related issues deemed necessary, and replace the Eldercaring Coordinator.
- d. If the judge finds the complaint without merit, the court may assess costs and attorney's fees against the party or parties submitting the complaint.
- e. The judge may forward the complaint to the regulatory body overseeing the Eldercaring Coordinator's qualifying licensure.

## **APPENDIX B:**

### **TRAINING MODULES AND TRAINING PROTOCOLS FOR ELDERCARING COORDINATION**

In order to attain the goal of ensuring a high level of proficiency in the performance of Eldercaring Coordinators, the following training guidelines have been developed. This guide contains two components, the first include the learning objectives and the second is how the training should be conducted.

#### **PART I: LEARNING OBJECTIVES**

These training objectives are recommended to orient professionals qualified by their states or jurisdictions to the issues and skills necessary to enter the practice of eldercaring coordination.

##### **1. Eldercaring Coordination Concepts**

- a) Define eldercaring coordination as an dispute resolution process and describe potential benefits for elders, their families, other stakeholders and courts.
- b) Explain the definition of eldercaring coordination in any applicable law and any Court Rules of Procedure.
- c) Discuss the source(s) of authority for the eldercaring coordination process.
- d) Describe the roles and functions of an Eldercaring Coordinator, including the activities of the Eldercaring Coordinator:
  - i. Facilitating more effective communication, negotiation, and problem-solving skills;
  - ii. Offering education regarding elder care resources;
  - iii. Facilitating the creation, modification, or implementation of an elder care plan;
  - iv. Making recommendations for resolutions; and
  - v. Making decisions within the scope of a court order or with the parties' prior approval.
- e) Identify how the role of an Eldercaring Coordinator differs from other types of roles supporting elders and their families in conflict, such as legal services, mediation, geriatric care management, guardianship, guardian ad litem, power of attorney, family substitute decision maker, medical surrogacy, or family counseling.
- f) Discuss the professional guidelines and standards that guide the practice of eldercaring coordination.

##### **2. Elder Law Pertaining to the Eldercaring Coordination Process**

- a) Detail the specific legislation, as well as court procedures, relevant to elders in your circuit or jurisdiction that are pertinent to the eldercaring coordination process.
- b) Describe how the parameters of the law relate to the eldercaring process and the role of the Eldercaring Coordinator.



- c) Clarify roles of those with joint or sole authority with regard to financial and health care decision-making for the elder.
- d) Explain the responsibilities and powers when guardianship is ordered by the court and the implications on the eldercaring coordination process.
- e) Describe the legal concepts that relate to the eldercaring coordination process including, but not limited to: due process, ex parte communications, relocation, and privilege.
- f) Explain the statutory constraints of eldercaring coordination where domestic violence exists and/or protective orders have been issued by the court.
- g) Describe when and how the Eldercaring Coordinator should interface with the court system.
- h) List the procedures to follow when requested to provide testimony or evidence.
- i) Describe the Eldercaring Coordinator's responsibilities to the court.

### **3. Capacity Considerations for the Eldercaring Coordination Process**

- a) Explain legal and medical perspectives of capacity and its relevance to eldercaring coordination
- b) Explore the elder's as well as other participants' ability to participate in the eldercaring coordination process.
- c) Describe and demonstrate screening for capacity to participate in the eldercaring coordination process and how to respond appropriately, while avoiding a dual role inherent in performing a broader screening for or assessment of capacity, which should be done by a qualified professional who is not acting as an Eldercaring Coordinator.
- d) Identify strategies to creatively enhance each person's capacity to engage fully in the eldercaring coordination process.
- e) Explain the presumption that the elder participates in all cases, to the extent possible.
- f) Discuss ways to incorporate the expressed wishes and current as well as long-standing values of an older person if she or he is not able to participate fully in the process.

### **4. The Eldercaring Coordination Process**

- a) Explain the processes of voluntary referral to eldercaring coordination and court ordered referral to eldercaring coordination, and potential differences between the two.
- b) Identify and explain the components of a (Ratified) Order of Referral or Stipulated Agreement for Eldercaring Coordination
- c) Identify all of the parties that could potentially be involved in the eldercaring coordination process including, the elder, legally authorized decision-makers and invited parties.
- d) Explain the importance of the written professional services agreement, including the elements that need to be included in the written agreement between the parties and the

Eldercaring Coordinator that describe the Eldercaring Coordinator's services.

- e) Discuss affordability issues regarding eldercaring coordination, description of fees and other costs, options for fee allocation, and implications of affordability issues.
- f) Explain the possible screenings for capacity to participate in the eldercaring coordination process that is to take place as part of the intake and how to implement ongoing screening on a periodic basis as appropriate in order to identify characteristics of individuals who may not continue to be appropriate to participate in the eldercaring coordination process.
- g) Identify other screenings that may need to be performed by qualified professionals to assess substance use disorder or mental health or health care condition.
- h) Identify other logistical factors that might influence or enhance the eldercaring coordination process, including but not limited to accessibility to attend a meeting location; proximity of bathrooms; break times; beverages; snacks or meals.
- i) Explain how to structure the eldercaring coordination process from screening and intake, through orientation, meetings, and outcome possibilities.
- j) Detail components of the orientation process for eldercaring coordination, explaining the process directly with participants and explaining the concepts which must be disclosed in writing to the parties.
- k) Explain importance of obtaining written acknowledgment by the parties that the Eldercaring Coordinator, in person, reviewed the terms of the Order of Referral, described the process and the role of the Eldercaring Coordinator, and notified the participants in writing of the information which must be disclosed.
- l) Identify collaterals and the development of a collaborative team to enhance the eldercaring coordination process. Clarify the Eldercaring Coordinator's role, responsibility, limitations and communication protocols within that context.
- m) List possible options for scheduling meetings at appropriate intervals to allow for reassessments of parties, progress of the eldercaring coordination and possible venues to consider; if meeting separately with parties, explain considerations for when joint appointments would be appropriate provided there are no safety concerns.
- n) Detail protocols for eldercaring coordination meetings logistics and interventions including, but not limited to, scheduling of appointments, communication protocols and documentation.
- o) Detail the procedures of each eldercaring coordination meeting, including but not limited to creating an agenda, handling emergencies, maintaining balance, and reassessment of conflict.
- p) Discuss how to appropriately interface with the court to request clarification or direction if necessary in furtherance of the eldercaring coordination process, to request a hearing if issues of safety arise, or to request termination of the process, if the process was court ordered

- q) Explain how to assess phases of the eldercaring coordination process as it progresses including data gathering; conflict resolution; maintenance and termination.
- r) Assess the needs of the client system with specific focus on the voice, risks and lifestyle preferences of the elder and the participants' past and current relationships with the elder and between each other.
- s) Assess productive procedures for facilitating eldercaring coordination meetings depending upon parties' relationships and abilities to communicate with one another, including need for initial and interim private meetings, caucus, and meetings by phone or in person.
- t) Identify components of the elder care plan as possible outcome of the process. including but not limited to how elder and parties will continue to address and resolve conflict; who might assist them; their resource and support team; their goals to continue after the process is completed; procedure for decision-making; division of responsibilities to carry out goals.
- u) Describe factors that may enhance or undermine the effectiveness of the eldercaring coordination process.

## **5. Ethical Considerations Pertaining to Eldercaring Coordination**

- a) Identify the foundational Ethical Principles for Eldercaring Coordination described in the Guidelines for Eldercaring Coordination: autonomy, beneficence, collaboration, professional competence, fidelity, integrity, justice, non-maleficence, and cultural competence.
- b) Explain the ethical value of a person-centered service provision that underlies the eldercaring coordination process.
- c) Identify ethical issues that might arise at any point in the eldercaring coordination process: person-centered/primacy of the elder's interests, self-determination, informed decision-making, coordinator neutrality, confidentiality, conflicts of interest, elder abuse, and professional boundaries.
- d) Identify common ethical dilemmas that might arise in the eldercaring coordination process and how to resolve them.
- e) Discuss policies and procedures that support an ethical practice as an Eldercaring Coordinator.
- f) Discuss the Association for Conflict Resolution recommended Guidelines for Eldercaring Coordination

## **6. The Elder Adult Within the Context of the Eldercaring Coordination Process**

- a) Identify and explain an elder's unique developmental needs and their impact on care-giving and decision making.
- b) Describe the interrelationship between physical challenges, mental declines and psychosocial well-being of the elder and their possible effects on the eldercaring coordination

process.

- c) Describe societal and participants' biases and cultural attitudes regarding aging, including myths of aging and stereotype, and possible effects of such on the eldercaring coordination process.
- d) Explain the effects of the elders' loss or potential loss of independence, including, but not limited to their finances, driving, living arrangements and decision making and possible effects of such on the eldercaring coordination process.

## **7. Family Dynamics Related to Elders Within the Context of the Eldercaring Coordination Process**

- a) Explain family systems including, but not limited to, homeostasis, boundaries, enmeshment/ disengagement, triangulation, collusion, communication styles, personality disorders, trauma histories, and how they relate to the eldercaring coordination process.
- b) Explain family dynamics, including family of origin, unresolved past, relationships and emotion, power and influence, and how they relate to the eldercaring coordination process.
- c) Detail significant transitional life changes of an elder and the possible impact on existing family dynamics and emotions of loved ones which may affect the eldercaring coordination process.
- d) Discuss the unique and complex roles of family caregivers, professional and paraprofessional practitioners, substitute decision makers and power of attorney and their relationship with the elder and clarify their impact on existing family dynamics which may affect the eldercaring coordination process.
- e) Explain the intricacies inherent in multi-generational and blended families and their possible effects on the eldercaring coordination process.
- f) Identify others who may be significant in the elder's life, how their roles may be interrelated to the elder and how they may be helpful or hinder the eldercaring coordination process.
- g) Explain possible effects of mental illness, substance use disorders, and other vulnerabilities in the family system which could affect the eldercaring coordination process.
- h) Explain how "high conflict" families can impact the care of an elder as well as the eldercaring coordination process, including the role of the elder in creating, perpetuating and or responding to the conflicts that exist within the family system
- i) Explain the psychosocial effects when transitioning through terminal illness of a loved one, the grieving process, and establishing closure in order to provide a support system through the eldercaring coordination process.
- j) Identify and be sensitive to the issues of culture, language and spiritual needs of the family system in a highly diverse society.
- k) Describe the impact of high conflict family situations on an elder, including but not limited

to impact of alignments, estrangements and alienation throughout the family system and during the eldercaring coordination process.

- l) Identify characteristics, impasse styles and patterns of interaction in high conflict families that hinder conflict resolution and interventions to reduce conflict within the eldercaring coordination process.
- m) Explain relevant psychological theories and social science research applicable to professional interventions for a family in eldercaring coordination.
- n) Develop methods to improve communication between the elder and the other parties in order to meet the needs and enhance the safety of the elder.
- o) Explain processes for obtaining information to facilitate resolution of disputes as they arise within the eldercaring coordination process.
- p) Describe methods to encourage compliance with court orders.

#### **8. Elder Abuse, Neglect, Exploitation and Family Violence and Their Implications on the Eldercaring Coordination Process**

- a) Discuss the legal and non-legal definitions of elder abuse, neglect, and exploitation, as well as interpersonal violence, and their context within the eldercaring coordination process.
- b) List specific dynamics within the family and caregiving relationship that may contribute to elder abuse and neglect, exploitation, extortion, dependency, influence, coercion, control, threat and duress, and their potential influence on the eldercaring coordination process.
- c) Discuss the effects of elder abuse, neglect, and exploitation on relationship and family dynamics, and the potential influence on the eldercaring coordination process.
- d) Explain the importance of understanding the history of the relationships and family dynamics in recognizing coercive, controlling behavior and their effects on the eldercaring coordination process.
- e) Explain the dynamics of perpetrators of abuse and the impact on the elder's abilities which could affect the eldercaring coordination process..
- f) Discuss the implications of different types of abuse (i.e. elder abuse, neglect, extortion, exploitation, family violence, and substance abuse) and their possible impact on the ability of the elder and others to participate in the eldercaring coordination process.
- g) Describe the unique problems and inherent dangers presented by family violence of all types in terms of establishing balance with the goals, needs and preferences of the elder as priority, facilitating agreements between those involved in the eldercaring coordination process, and the need for safety in the eldercaring coordination process.
- h) Identify procedures for initial and on-going screening for elder abuse, neglect, and exploitation, as well as family violence, and appropriate courses of action when safety parameters are needed.

- i) Utilize a screening tool that identifies risk factors and the various ways they are manifested, such as power imbalances and safety issues that may impact the eldercaring coordination process.
- j) Explain the importance of monitoring adherence to the elder care plan.
- k) Explain the importance of employing safety precautions and interventions in the eldercaring coordination process, including the elder, family members, other stakeholders and the Eldercaring Coordinator.
- l) List appropriate pre-cautions, safety interventions and obligations when confronted with elder abuse and neglect, exploitation, family violence, substance abuse and mental health issues within the context of the eldercaring coordination process.
- m) Explain the limitations of confidentiality and the legal and ethical responsibility of the Eldercaring Coordinator, as well as others that may be participating in the eldercaring coordination process, to report elder abuse, neglect and exploitation.
- n) Explain the importance of reporting to a judicial officer infraction of existing court orders, including the need to modify an eldercaring plan with the inclusion of safety parameters, using the appropriate forms for communicating to the court.
- o) Describe the process for terminating the eldercaring coordination process when continuing with the process would endanger the safety of those involved including the Eldercaring Coordinator.
- p) Detail when it is mandatory to report to the court regarding safety issues, including what constitutes reasonable cause to suspect the elder has or is being abused, neglected, or exploited, or is expected to be or wrongfully removed from the jurisdiction of the court without prior approval of the court, and what procedures are required when reporting emergencies to the court.
- q) Identify the specific Statutes relevant to safety and protection of elders and how they apply to the eldercaring coordination process.  
(Note: A minimum of four hours of instruction on safety relating to the eldercaring coordination process shall be offered integrated into eldercaring coordination training.)

## **9. Resources and Professional Supports for the Elder and Family as well as the Eldercaring Coordination Process**

- a) Explain how to include existing professional supports in the eldercaring coordination process, such as attorneys, those authorized by the court with decision-making discretion, doctors, nurses, professional guardians and other health care professionals.
- b) Identify additional professional resources that may assist with the planning, care and well-being of the elder and support system, including but not limited to: mediators, geriatric care managers, social workers, patient advocates.
- c) Explain how to work with legal, mental health (e.g. social workers, psychologists, marriage

and family therapists) and other professional disciplines, and promote cooperation among those dealing with the family and stakeholders.

- d) Detail when and how to refer to and collaborate with a qualified expert and use a team approach to best serve the parties in the eldercaring coordination process.
- e) Identify resources to assist in the caregiving of the elder and enhance financial, health care, and social service benefits.
- f) Explore possible living arrangements or domicile, including those provided by family members (may include granny flats), others in supportive roles, skilled nursing facilities, assisted living communities, and personal care homes.
- g) List specific sources of referrals for parties.

#### **10. Eldercaring Coordination Techniques**

- a) Detail the characteristics and training that enhance or undermine the effectiveness of the Eldercaring Coordinator.
- b) Describe the need for appropriate accommodations for the eldercaring coordination process and how the range of accommodations is used to enhance or support participation of the elder and by all parties.
- c) Develop strategies for intervention with the elder and parties, including goals and time frames within the eldercaring coordination process.
- d) Identify the concept of intractable conflict and discuss how to transform it into a framework more suitable for resolution of conflicts within the eldercaring coordination process.
- e) Explain elder care plan agreements and how to memorialize agreements between the parties during the eldercaring coordination process.
- f) Explain procedure for having agreements ratified and incorporated as an order of the court during the eldercaring coordination process.
- g) Identify skills and parameters of decision making for the Eldercaring Coordinator, when more facilitative processes are ineffective; analyze when a more directive approach is needed or when more time/skill is needed for facilitative problem solving to be effective.
- h) Create and modify an elder care plan taking into consideration the elder's health, abilities, goals, needs and preferences and the ideal integration of these elements to meet the best interests of the elder.
- i) Select elder care plan elements that address different family circumstances including, but not limited to: geographic distance, safety focused parameters, high conflict elements, and special needs of family members.
- j) Develop strategies to assist the parties involved to implement their elder care plan and court orders during the eldercaring coordination process.

- k) Identify appropriate boundaries of an Eldercaring Coordinator, including establishing office safety policies and establishing appropriate limits for client demands.

## **PART II: TRAINING PROCEDURES FOR ELDERCARING COORDINATORS**

In order to attain the goal of ensuring a high level of proficiency in the performance of Eldercaring Coordinators, the following training guidelines are recommended.

1. **Prerequisites for training:** Trainees are expected to meet the professional qualifications of Eldercaring Coordinators, as well as having completed a comprehensive family mediation training and training in elder mediation.
2. **Focus of eldercaring coordination as a unique interdisciplinary process.** The training should entail an integrated process for learning the concepts and skills to perform the duties of an Eldercaring Coordinator, while building upon the knowledge already brought in by the trainees. To cover all the modules the training will necessitate a minimum of 28 hours although more time is encouraged to cover the objectives thoroughly.
  - a. The training should go beyond the general concepts and move to specifics in order to encompass all types of cases the Eldercaring Coordinator may encounter.
  - b. The training should combine the new concepts through lecture and readings with experiential learning, application of the ideas, and feedback.
  - c. The key to a brief training is to integrate the specific and unique knowledge base needed for the trainee's future practice as an Eldercaring Coordinator.
3. **Training methodology**
  - a) Pedagogy. A complete eldercaring coordination training program should include, but is not limited to, the following: lecture, group discussion, written exercises, simulations and role plays. In addition, readings and other resources should be provided by the trainer to supplement the training.
  - b) Role Play Requirements.
    - i. Eldercaring coordination training should allow ample time for role plays to help the Eldercaring Coordinator develop and practice skills that are specific to the process and the role.
    - ii. At a minimum, every participant should participate in a role play of an eldercaring coordination session. The role play should be practical in time and scope.
    - iii. At the conclusion of each role play, time should be allocated for self-reflection and oral or written feedback to the participants. Feedback to participants should be provided or supervised by the trainer.
    - iv. Role play developers should consider role descriptions that suggest realistic ways of "playing" the older client and discuss biases that arise.
    - v. Training should provide time to practice all stages of the eldercaring coordination process and should support Eldercaring Coordinators in gaining competence to facilitate discussions that include multiple generations, blended families, multi-parties, high conflict and ethical considerations.
    - vi. Role play debriefing should support reflection and a safe environment for learning and self-evaluation.  
(Note: The ACR Elder Mediation Training Objectives has an Appendix attached to their work entitled "Appendix: Mediation Skills Training: Best



Practices" which has a comprehensive list of points and concepts to help trainers present skill training through role play.)

- c) Simulation. A complete eldercaring coordination training should present a role play simulation of an eldercaring coordination session (either live or by video) prior to the participant's role play experience.
- d) Breaks. Trainers should provide appropriate breaks during their training sessions which should be in addition to the number of required hours for training.

#### **4. Ethics.**

- a) A complete eldercaring coordination training program should review eldercaring coordination ethics for at least two hours and include the Association for Conflict Resolution recommended Ethical Guidelines for Eldercaring Coordination.
- b) Eldercaring Coordinator ethics should be woven throughout the training program and materials wherever applicable.

#### **5. Primary Trainer qualifications**

- a) Primary Trainer. A primary trainer should be present throughout the entire course.
- b) Primary Trainer Qualifications: A primary trainer should demonstrate the following qualifications as stated in the guidelines:
  - i. Meet the qualifications to be a Eldercaring Coordinator
  - ii. Successful completion of an eldercaring coordination training that meets the Association for Conflict Resolution Eldercaring Coordination recommendations for training.
  - iii. Previous experience in training of other relevant topics such as elder mediation or parenting coordination.
- c) Eldercaring Coordination Experience: Serving as Eldercaring Coordinator in at least 5 cases lasting at least six months in duration, with a minimum of two active cases within the last two years.
- d) Eldercaring Coordination Continuing Education: An eldercaring coordination trainer should complete a sufficient amount of continuing education in order to be current with rules, statutes and research applicable to eldercaring coordination. Live attendance is preferable.

#### **6. Use of guest lecturers**

- a) As an interdisciplinary process, the trainer should demonstrate collaboration and team work by inviting guest lecturers such as judges, attorneys, mediators, mental health professionals, psychologists, social workers, marriage and family therapists, domestic violence experts, health care providers, professional guardians, and geriatric care managers.
- b) A guest lecturer should have a substantial part of his or her professional practice in the area about which the specialist is lecturing and should have the ability to connect his or her area of expertise with the eldercaring coordination process.
- c) Lectures on elder law should be presented by a member of The State/Providence Bar with elder law experience.
- d) Lectures on family dynamics and mental health and psychosocial issues should be presented by a qualified mental health professional (such as a social worker, psychologist,

- or marriage and family therapist).
- e) Lectures on health and medical issues relating to elders should be presented by licensed physicians, nurses, and other medical professionals.

## **7. Course Content Requirements**

- a) Learning Objectives. A complete eldercaring coordination training should incorporate the learning objectives contained in Part I of this document.
- b) Required Training Materials. At a minimum, trainers should provide each of the participants with the following written materials:
  - i. An agenda annotated with the learning objectives to be covered in each section;
  - ii. A training manual that includes basic information for each module, relevant statutes, Court Rules of Procedure and Administrative Orders, forms, role play simulation, additional resources, and other pertinent materials.

## **8. Completion of training and evaluation of students**

- a) Participants should complete the eldercaring coordination training requirement by physically attending one entire live training program.
- b) The primary trainer is responsible for ensuring that the integrity of each portion of the program is not compromised.
- c) A training program should provide, at the conclusion of the training, written documentation of completion to participants who successfully complete the program.

## **9. Program evaluation**

At the completion of the course, each participant should complete a course evaluation which should be reviewed by the trainer as part of quality assurance.

## **10. Records retention policy**

The primary trainer should be responsible for maintaining records of those who completed the program for no less than five years.

## APPENDIX C:

### The Association for Conflict Resolution (ACR) Task Force on Eldercaring Coordination

#### ELDERCARE COORDINATION PILOT PROJECT PROPOSAL TEMPLATE

***The following is a possible template of a court program that demonstrates inter-divisional court collaboration to provide Eldercaring Coordination as a dispute resolution option for high conflict cases involving elders. This template is for illustrative purposes and is meant to be modified and adjusted according to circuit or jurisdiction needs and available resources. Further explanation can be found under specific headings as to how this template may be used to inform the court or obtain funding for a program. Potential forms that could be integrated into the Pilot Project, including an Order of Referral to Eldercaring Coordinator, are included as Exhibit items A-D.***

#### ***I. Introduction and Brief Overview***

The Case Management Unit of the Probate/Guardianship Division, (Family Court Services of the Family Division and Mediation/Arbitration Division of the # Judicial Circuit seek to collaborate in a Pilot Project to enhance the use of dispute resolutions options for elders, and specifically to add “eldercaring coordination” as a viable resource in high conflict probate/guardianship cases involving elders.

Using the role of parenting coordination (a process frequently used in family law cases) as a model, eldercaring coordination has been developed for use in probate/guardianship cases in which high conflict family dynamics interfere with the well-being and safety of the elder, limit their adherence to court orders, impede their court process, and detract from the efficacy of guardianship and other appointments by the court.

Guidelines for Eldercaring Coordinators were have been developed by an interdisciplinary Task Force consisting of twenty U.S. and Canadian organizations convened by the Association for Conflict Resolution (members listed on Appendix E), hereinto for referenced as “ACR Task Force”.

***II. Justification: In order for a program to be taken seriously, factual information, including statistics pertinent to that locality will be necessary to verify need; include population demographics as well as potential savings to the court and community (e.g. sample language, which may be customized to local, state, or province data follows).***

The acceptance and utilization of parenting coordination for high conflict cases involving children gives precedence to the application of the “coordination” process in other situations involving conflict. Parenting coordination is governed by (statute) and (Rule). The application of this process to cases involving elders is a natural evolution of “coordination” and the expansion of the definition of “family” to include the life span of the family unit.

Members of the “Baby Boom Generation” began turning 65 in 2011 and nationally the number of elders is expected to double by 2030. The growth of this demographic will increase the burdens on Guardianship programs and the Probate/Guardianship Division of this Circuit. (Name) County has experienced a growing population of people over sixty years of age (# in year). This segment of the population faces unique challenges, with the numbers of elders diagnosed with dementia

expected to increase (%). The (year) Census cites that over \_\_\_% of the population of the County was 65 years or older that year. \_\_\_ percent or # of those elders 65 years or older were living in poverty in (year). Of those 75 years and older, \_\_\_% lived alone with unmet needs, with # living below the poverty line. However, # of elders (\_\_\_ %) own their homes. \_\_\_ percent of the elders reside alone and are at high risk for self neglect. Most elders are supported by their families with additional funds. However, elders who have other family living with them (\_\_\_ %) actually have a higher risk for abuse and exploitation, especially if they own their property.

According to the (Agency/Department), \_\_\_% of the elder population in \_\_\_\_\_county are minorities, including\_\_\_% of residents of (specify minorities) 60 years or older. There were \_\_\_% females over 60 years compared to \_\_\_% males.

As of (date), the projected caseload of the Probate/Guardianship Division in this Circuit is # cases, which includes over # guardianship cases. Other cases filed, but not counted in the above, are # Baker acts and # substance abuse cases that are filed on a monthly basis, and other # miscellaneous petitions. In (previous date for basis of comparison), there were # Baker Acts filed; that number has grown to # as of (date), a \_\_\_% increase.

***III. Interdivisional Court Collaboration: Briefly describe court Divisions and units such as Probate/Guardianship Division, Case Management Unit, Mediation/Arbitration Division, and Family Division/Family Court Services and any other court or community entity or program that will collaborate to develop eldercaring coordination; include brief descriptions of each so that it is clear how they may contribute individually and/or jointly in this partnership.***

The Probate/Guardianship Division, Case Management Unit, Mediation/Arbitration Division, and Family Division/Family Court Services are prepared to collaborate in order to conserve and capitalize on existing court resources in order to effectuate this Pilot Project.

- The Circuit's Probate/Guardianship Court Case Management Unit is responsible for maintaining and tracking compliance with state Statutes, Rules of Procedure and local rule requirements governing the probate estate and guardianship cases. Work involves tracking and monitoring the judge's caseload and guiding cases through the appropriate court processes.
- The Mediation Division of this Circuit currently provides access to mediators for cases in the Family and Juvenile/Dependency Divisions and County Court cases (including Landlord Tenant, Small claims and other civil matters). Elder Mediation is a relatively recent dispute resolution option available to elders and their families in this Circuit through community providers; there are (no) court connected elder mediators at this time.
- *(If there is a Family Court Services)* This Circuit formally created its Family Court Services Unit in (year) to fulfill judicial requests in order to expedite court proceedings and respond to the needs of parents and children with cases in the Family (Domestic Violence, Unified Family Court) Divisions. Family Court Services provides court-ordered intervention to high conflict cases in order to promote the well-being of children in their relationships with both parents, while reducing children's exposure to parental discord. Services are available to parties to supplement their mediation process when they have reached a partial agreement, impasse, or need further support to implement their agreements. (Replace paragraph with reference to resources available to the Family Division if no Family Court Services is available.)

The Family Court Services Unit provides parenting coordination services. Parenting coordination is a child-focused dispute resolution process in which a trained Parenting Coordinator helps facilitate resolution of parenting issues between high conflict parents in a timely manner. Family Court Services provides parenting coordination to indigent cases and referrals to Parenting Coordinators in the community when affordability is not an issue. There are currently # PCs in this circuit on the roster of those qualified according to state Statute, (who have also taken a circuit specific training to inform them of the Circuit protocols).<sup>1</sup> Since a study of judges/general magistrates, attorneys, and Parenting Coordinators in Florida surveyed in 2010 found a significant approval rate for the process,<sup>2</sup> it is time to offer a coordination process adapted to the needs of high conflict families dealing with elder issues.

The systems in place for parenting coordination are easily adaptable to address the needs of elders in high conflict family situations. The Probate/Guardianship Division Case Management Unit, Mediation/Arbitration Division and Family Court Services/Family Division wish to collaborate during this Pilot Project to provide eldercaring coordination as a dispute resolution option for high conflict cases to a defined group of probate or guardianship cases.

***IV. Eldercaring Coordination Pilot Project Mission: Describe eldercaring coordination and include the definition and qualifications of Eldercaring Coordinators endorsed by the ACR Task Force on Eldercaring Coordination, as well as specific goals of the Pilot Project.***

Eldercaring coordination is a dispute resolution option specifically for high conflict cases involving issues related to the care and needs of elders in order to compliment and enhance, not replace, other services such as provision of legal information or legal representation, individual/family therapy, medical, psychological or psychiatric evaluation or mediation. Eldercaring coordination focuses on improving family dynamics so elders, their family, and other stakeholders are able to work better with each other and with service providers in times of transition and the difficult situations that often arise during the aging process. Families and stakeholders who work together are better equipped to address an elder's needs in a manner that respects the elder's autonomy, promotes the elder's safety, and increases the benefits available from various service providers.

**Definition of Eldercaring Coordination.** The ACR Task Force on Eldercaring Coordination approved the following definition of this process to assist high conflict cases involving elders:

Eldercaring coordination is a dispute resolution process during which an Eldercaring Coordinator assists elders, legally authorized decision-makers, and others who participate by court order or invitation to resolve disputes with high conflict levels in a manner that respects the elder's need for autonomy and safety by:

- Facilitating more effective communication, negotiation, and problem-solving skills;
- Offering education about elder care resources;
- Facilitating the creation, modification, or implementation of an elder care plan if such a plan is necessary to reach a resolution;

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<sup>1</sup> **Note:** Include other statistics if available.

<sup>2</sup> Fieldstone, L., Lee, M., Baker, J., McHale, J. (2012) Perspectives on Parenting Coordination: Views of Parenting Coordinators, Attorneys, and Judiciary Members, Family Court Review, July 2012.

- Making recommendations for resolutions; and
- Making decisions within the scope of a court order or with the parties' prior approval.

### **Qualifications of an Eldercaring Coordinator.**

1. An Eldercaring Coordinator shall be licensed or certified by a regulatory body of a jurisdiction, state or province, with at least a master's degree and the following:
  - a. Completion of family mediation training certified or approved by the circuit, state or province or commensurate with the objectives established by the Association for Conflict Resolution;
  - b. Completion of elder mediation training certified or approved by the circuit, state or province or commensurate with the objectives established by the Association for Conflict Resolution;
  - c. Completion of eldercaring mediation training certified or approved by the circuit, state or province or commensurate with the objectives established by the Association for Conflict Resolution;
  - d. Extensive practical experience in a profession relating to high conflict within families.
2. An Eldercaring Coordinator shall be psychologically and cognitively able to perform the requirements of the Eldercaring Coordinator role; and have no situation, condition, impairment, or disorder that prevents the ethical, responsible and effective exercise of the Eldercaring Coordinator role.
3. An Eldercaring Coordinator must decline a case, discontinue service and immediately report to the court and the parties if any disqualifying circumstances as noted above occur, or if he or she no longer meets the minimum qualifications.

The court may require additional qualifications to address issues specific to the elder and other eldercaring coordination participants.

A qualified Eldercaring Coordinator must be in good standing, or in clear and active status, with all of the respective professional licensing authorities or certification boards affiliated with the regulatory body (or bodies) of her or his state(s), province(s), or jurisdiction(s), as applicable.

**ACR Eldercaring Coordination Pilot Project.** The ACR Task Force included in its mission to develop the Eldercaring Coordination Pilot Project (heretofore referred to as "Pilot Project"). The ACR Task Force proposes that the process of eldercaring coordination, and therefore the Pilot Project, will:

- Help manage high conflict family dynamics in probate/guardianship cases, so that the elder, family members and stakeholders can address non-legal issues without court involvement;
- Ready the elder and high conflict family to work with collaterals to address medical, financial and legal issues, avoiding delays and resulting in better decisions for the elder;
- Promote the self-determination of the elder to the extent of his or her ability as fully as possible;
- Promote safety by monitoring situations at high risk for abuse or neglect;
- Provide a support system for the elder and family during times of transition; and

- Free precious judicial time by addressing matters for which other dispute resolution processes have been unavailable or have been ineffective.

***V. Projected Outcomes of Pilot Project: Detail how the Pilot Project results may be measured or assessed and what outcomes are anticipated both short and long term. The Florida Chapter of the Association of Family and Conciliation Courts (FLAFCC) Task Force and the ACR Task Force collaborated to create a project assessment consisting of pre- and post-surveys for the elder, other participants, and the Eldercaring Coordinator (included herein).***

The success of this Pilot Project will be assessed by:

1. reduction in hearings before the court in moderate and high conflict probate situations;
2. review of Eldercaring Coordination Surveys for elders and their families and stakeholders (e.g. professional guardians, other court appointed decision-makers, non-family members) that have participated in eldercaring coordination;
3. identification of and reduction of elder abuse, neglect, and exploitation;
4. increased use of community resources (e.g. physicians, guardians, geriatric care managers, occupational therapists, mental health counselors, social workers, elder mediation, legal services, etc.) to assist the elder and family;
5. development of a Pilot Project design that can be replicated statewide and nationally by other circuits interested in pursuing project goals and objectives.

The Pilot Project would, therefore, identify the # Judicial Circuit as a leader in developing dispute resolution options for probate/guardianship cases. Based on the outcome of the Pilot Project, possible long range goals include:

- developing discussion amongst stakeholders (professional, court, collaterals) regarding the application of eldercaring coordination when differences regarding eldercare create high conflict within families and with others in supportive roles for the elder;
- using existing and facilitating new research to study the implications of eldercaring coordination as a vehicle for high conflict management and the resolution of disputes regarding eldercare issues;
- exploring the ethical considerations and challenges in applying concepts used in the coordination process for parents with minor children to the elder population and existing legal frameworks for elders;
- implementing the process of eldercaring coordination to best address high conflict family dynamics when eldercare is an issue;
- creating and implementing guidelines, including training and qualifications, for professionals practicing eldercaring coordination;
- creating a possible program to refer parties for eldercaring coordination in high conflict cases;
- expanding the definition of “family” within the context of the court;
- encouraging interdivisional collaboration between court divisions to conserve resources by utilizing them for families of all ages and life stages; and
- expanding the use of “coordination” as a dispute resolution option to address high conflict cases involving various situations and issues.

***VI. Proposed Pilot Project Design: Explain who or what Division will implement the program and with what oversight.***

This Circuit has a well-established Probate/Guardianship Division Case Management Unit that could assume the implementation of a Pilot Project for “Eldercaring Coordination” in collaboration with the Mediation/Arbitration Division and Family Court Services/Family Division (and/or Community Dispute Resolution Program).

For the purposes of this Pilot Project, each Eldercaring Coordinator would commit to the completion of (at least) \_\_\_ eldercaring coordination cases on a pro bono basis.

All Eldercaring Coordinators would also commit to meeting monthly with the Supervisor of Probate Case Managers, Supervisor of Family Court Services/Family Court Manager, the Director of Mediation/Arbitration and the Director of the Probate Division to review standards and develop protocols for the Pilot Project and for the Court’s Probate/Guardianship Division to consider when reviewing outcomes and the possible benefits of the Pilot Project.

***VII. Pilot Project Timeline: List specific steps toward implementation with expected time-frames for each.***

Upon approval of the Pilot Project, the Supervisor of Family Court Services/Family Court Manager, the Director of Mediation/Arbitration and the Director of the Probate Division would begin the planning stage of the Pilot Project to:

- develop protocols (procedures/forms)
- train the Eldercaring Coordinators in circuit/court specific protocols
- educate Probate Case Managers and judiciary
- integrate implementation
- provide mechanism for assessment

***VIII. Implementation: Describe in more detail the implementation process, how the program will be executed with eldercaring coordination integrated into the services provided by the court or community for high conflict cases involving elders. Include what triggers would identify a case that might be appropriate for eldercaring coordination and when in the court process the Eldercaring Coordinator could be ordered.***

The elder and others in a supportive role may choose to enter the eldercaring coordination process voluntarily or through an Agreed Order of Referral to Eldercaring Coordinator. The Court may order parties to eldercaring coordination without their consent if it determines that:

a) there is evidence of neglect, abuse, or exploitation against the elder, or the elder’s health, safety and well being are in immediate jeopardy; and

b) the elder and other participants of the eldercaring coordination process have the financial ability to pay the eldercaring coordination fees and costs, or such services are available for an indigent party at no cost or low cost to that party as described below.

The Eldercaring Coordinator has the responsibility to determine who would be appropriate to include in the process and may change the list of participants over time.

An Eldercaring Coordination Pilot Project should have the capacity to test this model with participants of the eldercaring coordination process with a diverse range of financial means,



including parties who are indigent. In selecting a judicial circuit for piloting the eldercaring coordination model, priority is given to those circuits which have public and/or private funds available to support this service for at least some indigent parties.

Eldercaring coordination could be offered to a Guardianship/Probate Division case at various points of entry in the legal proceedings. If the parties had not attempted elder mediation, and it is available, they may first be diverted to that process. If the parties reach an impasse in mediation or are not amenable to the process initially, the court could designate eldercaring coordination to assist them in managing their conflict. The Mediation Division and Family Court Services/Family Division will work collaboratively to ensure that the parties have the most viable dispute resolution process available to them throughout their court experience.

**Examples of Case Conflict Identified as Appropriate for Pilot Project.** Cases would be identified for participation in the Pilot Project according to the level of conflict between the elder, possible decision makers (e.g. certain family members, guardian, others designated by the court), and other stakeholders (e.g. extended family members and significant others, attorneys, health care or other professionals, etc.). Identifiers of conflict levels would be further clarified for training purposes before the Pilot Project and reassessed during the Pilot Project and may include:

✓	<b>MINIMAL/MILD CONFLICT</b>
	Parties have legal issues but are usually cooperative
	Caregivers and others involved with the elder can usually separate elder's needs from own needs
	Family members and others in a supportive role validate and respect elder, even if elder is incapacitated
	Family members disagree but are able to maintain composure when together and when in court
	The elder and others in supportive role respect each others' value to the elder
	Tolerance for differences; flexibility to cooperate
	No risk of violence or abuse flagged
	Elder and others in a supportive role committed to same end goal
✓	<b>MODERATE CONFLICT</b> → <b>Mediation</b>
	Negative emotions are able to be brought under control
	Parties attempt to form coalition with other family members; sibling splitting
	Focus on blame
	Imbalance of power
	Verbally aggressive though no threat or history of physical violence
	Parties berate each other; threats of further litigation
	Devaluing others important to elder
	Involvement of lawyers for non-legal issues
	Parties have difficulty maintaining composure
	Discreet issue or few issues to be resolved
✓	<b>HIGH CONFLICT</b> → <b>Eldercaring Coordination</b>
	Mediation has reached an impasse
	Multiple motions to the court; high rates of litigation over non-legal issues
	Imbalance of power – some family members have attorneys and others do not or all parties self-represented
	Constant disputes about un-measurable or unsubstantiated items
	Possessive or controlling behavior toward the elder
	Difficulty in others separating elder's needs and desires from their own; high degree of rigid thinking; win/lose mentality

Chronic disputes over access and support
Coalitions/sibling splitting entrenched
Possible endangerment of elder or other parties
History of domestic violence in family
Cross allegations of family members; possible safety concerns
Drug/alcohol abuse
Elder being denied access to family member(s) and/or significant others
Parties being denied access to information
When money is used as bargaining tool or being withheld for care of the elder
High emotionality expressed by parties in court; verbal abuse; loud quarreling
Parties are not able to work cooperatively with collaterals and resources for the elder
Number of collaterals/agencies involved
Others' conflict may place elder in jeopardy

If identified as “moderate conflict”, the case may initially be offered mediation; if identified as “high conflict”, the case would be ordered for eldercaring coordination. Additionally, cases that impasse in mediation would be referred to an Eldercaring Coordinator.

**Points of Entry into Pilot Project.** Depending on the level of conflict observed by court personnel or alleged in court filings, a Probate/Guardianship case would typically be referred to Eldercare Coordination at one of three times during the case:



**General Magistrate’s Report of Recommendations.**

Examples of cases with moderate conflict may be referred to mediation:

- Siblings want different social settings for parent: assisted living or in the home of one of the siblings;
- Siblings don’t agree which is best suited to be guardian: one is professional with higher income who lives out of state and the other, with fewer financial resources resides near elder;
- Mother and son don’t agree which medication to use for father, who has no lucidity when on the currently prescribed treatment plan – mother believes father is overmedicated and wants to change doctors while son believes medication is appropriate.
- Three siblings are competing to be Guardian for their sister.

Examples of cases with high conflict to be referred for eldercaring coordination:

- One sibling that won’t give other siblings and their spouses access to parent;
- Current wife moved husband/father and won’t tell his sons where;
- Sibling with greater financial resources, represented by attorney, wants to pay for corporate professional guardian instead of family member better suited.

**Determination of Incapacity.**

Examples of cases with moderate conflict may be referred to mediation:

- Two of three doctors of the Committee who evaluated the elder recommended limited or plenary (total incapacitation) guardian, one of the two siblings believes parent should have the limited right to vote and discretion to spend small amounts of money, the other sibling believes no money should be given to the parent.
- Parent believes he/she is slipping away and wants to volunteer to have professional guardian appointed, daughter does not agree.
- Parent home alone all day with dog, child wants parent to move in with her without her beloved dog.

Types of cases with high conflict to be referred for eldercaring coordination:

- Parent has limited capacity and wants right to marry – children disagree.
- Parent married person 20 or 30 years younger, children wanted to vacate or set aside the marriage.
- Elder's children split in wanting to remove right to take medication, treatment, drive, vote and marry; elder's fiancé, who resides with the elder, and her children believe capacity is not an issue.
- Parent made stepson medical surrogate and biological children disagree.
- Ex-spouse, who has remarried and still been caring for elder, wants to be Guardian; a sibling of elder, who hasn't seen her in a year, is requesting to be Guardian.
- Elder's daughter has been caretaker, and elder's son is alleging she has cut him off from their father; he wants to be Guardian, kick sister out of the house and place parent in facility.

### **Guardianship.**

Types of cases with moderate conflict may be referred to mediation:

- Guardian restricting family's access to the elder.
- Elder receiving care at home as delegated by guardian; children do not agree.
- The Guardian is not allowing access to or providing financial information about a parent; the brother wants to be reconsidered for position or wants new Guardian.

Types of cases with high conflict to be referred for eldercaring coordination:

- Guardian wants to disconnect from feeding tube and children don't agree.
- Conflict between family members, as current wife and their children don't want former wife and children from prior marriage to have access.
- Siblings don't approve of guardian's decisions, interfering and frustrating the guardianship process.
- Guardian has formed alliance with one sibling and does not give access or information to other sibling.

***IX. Execution of Eldercaring Coordination: Explain how the program itself would function, including practical aspects from start to finish (e.g. court order, affordability, safety precaution, documentation, term of Eldercaring Coordinator and complaints procedure.***

**Court Order.** Elder and others in supportive roles may choose to enter the eldercaring coordination process voluntarily or through an Agreed Order to Eldercaring Coordinator. The Court may order parties to eldercaring coordination without their consent if it determines that:

a) there is evidence of neglect, abuse, or exploitation against the elder, or the elder's health, safety and well being are in immediate jeopardy; and

b) the parties have the financial ability to pay the eldercaring coordination fees and costs, or such services are available for an indigent party at no cost to that party as described below.

Once identified for the project by the level of conflict, a standardized Order of Referral to Elder Coordinator be issued by the judge (see Exhibit A), specifying the definition of eldercaring coordination, the role and limitations of the Eldercaring Coordinator, the parties ordered to participate in the process including the name of the elder and all other legally authorized decision-makers for the elder, the language of preference, whether elder abuse, neglect or exploitation has been or is currently an issue, and the responsibility for fee payment for the Eldercaring Coordinator's services. A copy of the Order will be sent to the Director of Mediation/Arbitration or Supervisor of Family Court Services to facilitate the services. The parties will first be given the opportunity to choose their Eldercaring Coordinator within 10 working days from the date of the Order, after which time the court will appoint a qualified Eldercaring Coordinator. Once chosen or designated, the Eldercaring Coordinator will be responsible for submitting the Eldercaring Coordinator Response Form (see Exhibit B) notifying the court of their acceptance to the position.

**Affordability, Fees and Costs.** In determining whether a non-indigent party has the financial ability to pay the Eldercaring Coordinator's fees and costs, the court shall consider the party's financial circumstances, including income, assets, liabilities, financial obligations, resources, and whether paying the fees and costs would create a substantial hardship. The Court shall include in its order the maximum fees and costs that each party is required to pay.

If a party is found to be indigent based upon the factors in § State Stat. , the court will only require eldercaring coordination, if an Eldercaring Coordinator can work on a pro bono basis, or there are public funds available to pay the indigent party's allocated portion of the fees and costs, or a nonindigent party consents to paying the fees and costs for the indigent party.

If a party has caused the Eldercaring Coordinator to expend an unreasonable and unnecessary amount of time, the court may order that party to be solely responsible for payment of the Eldercaring Coordinator's fees and costs for such time expended. Failure to pay the Eldercaring Coordinator's fees and costs in a timely manner may subject the party to sanctions for contempt of court. The Eldercaring Coordinator may suspend services until the issue of fees is resolved.

The Pilot Project should have the capacity to refer individuals and families with diverse financial means for eldercaring coordination, including parties who are indigent. (In selecting a judicial circuit for piloting the eldercaring coordination model, priority should be given to those circuits which have public and/or private funds, or Eldercaring Coordinators that will provide services at low or no cost, available to support this service for at least some indigent parties.

**Safety Precautions.** The court's Order of Referral to Eldercaring Coordinator should include a provision for the court to acknowledge that the judge has confirmed that there are no reports of verified elder abuse, neglect, or exploitation as defined by statute and there are no domestic violence or other civil injunctions or criminal no-contact orders existing between the parties. The order should also state that the court inquired into whether there is a history of verified elder abuse or domestic violence involving any of the parties. If the court determines there is a history, the court must obtain consent of the elder and from all parties participating and establish appropriate safeguards for the process. Accordingly, each circuit should have in place a process to screen out and/or develop specialized eldercaring protocols and procedures for domestic violence or abuse, neglect or exploitation cases.

An Eldercaring Coordinator must immediately inform the court if an abuse report is pending Adult Protective Services or if there is reasonable cause to suspect that the elder or a minor child will suffer or is suffering abuse, neglect, abandonment or exploitation or that someone is expected to wrongfully remove or is wrongfully removing the elder from the jurisdiction of the court without prior court approval.

**Eldercaring Coordinator's implementation of the Order.** Upon referral, the Eldercaring Coordinator will contact the elder and legally authorized decision-makers, family members and other stakeholders identified by the court and the parties to obtain preliminary intake information. The Eldercaring Coordinator will then schedule a joint appointment to explain the process to all of the parties jointly and begin their work together. The Eldercaring Coordinator will send in documentation to the court regarding the parties' adherence to the eldercaring coordination process (e.g. maintaining appointment schedule), if eldercaring coordination is not an appropriate dispute resolution option for that case or is no longer necessary, when the term of the Eldercaring Coordinator has expired, progress (e.g. specific decisions the elder and participants in the eldercaring coordination process have made), and outstanding items that require further direction from the court (e.g. non-compliance in following court order(s), issues requiring Court intervention).

**Documentation.** The Eldercaring Coordinator is responsible to submit a Response Form to alert the court that he or she agrees to provide eldercaring coordination for each specific case in which it is ordered. The Eldercaring Coordinator also provides documentation to the court when his or her term expires as Eldercaring Coordinator.

Original documents are sent to/filed electronically with the clerk's office for docketing, copies are sent to the parties, their attorneys, and Guardian, when appointed.

Additionally, the Eldercaring Coordinator is to notify the court of (1) an emergency, such as a verified abuse, neglect, or exploitation report or an injunction for protection or criminal arrest, or (2) the Eldercaring Coordinator has determined that it is no longer safe to continue the process, even with safety precautions in place. Upon receipt of such notice, the court should set a status hearing to determine whether to terminate the eldercaring coordination process.

Note: The Eldercaring Coordinator understands and complies with the duty to inform the appropriate authorities of suspected incidents of elder abuse or neglect and/or risk to self or another in accordance with the reporting requirements of her or his respective jurisdiction and profession. When the Eldercaring Coordinator reports a matter of actual, suspected or potential harm to the proper authorities (law enforcement, protective services, etc.) as directed in his or her profession's code of ethics and/or the law of her or his state, province, or jurisdiction, the Eldercaring Coordinator will notify the court immediately (see Exhibit C: Eldercaring Coordinator Report of Emergency) and services of the Eldercaring Coordinator may be suspended while awaiting further direction from the court.

**Term.** The term of the Eldercaring Coordinator will be included in the Order of Referral to Eldercaring Coordinator, which is not to exceed two years. The court shall remove an Eldercaring Coordinator if that Eldercaring Coordinator becomes disqualified to continue service or if a finding of good cause is shown based on the court's own motion or a party's written motion. Good cause includes, but is not limited to the perpetration of elder abuse, neglect, or exploitation by the Eldercaring Coordinator; circumstances that compromise the safety of any person or the integrity of the process; or a finding that there is no longer a need for the service of the Eldercaring Coordinator. The motion and notice of hearing shall also be served on the Eldercaring

Coordinator. The court may issue a subsequent Order of Referral to Eldercaring Coordinator to a new provider in the same manner as the original.

**Complaints Procedure.** Any party (or parties) in an eldercaring coordination process with a complaint about the conduct of an Eldercaring Coordinator shall provide a written complaint to the Coordinator. A party who wishes to include an advocate or neutral facilitator in the discussion shall first provide the Eldercaring Coordinator with a written complaint.

- a. If the party or parties are not satisfied with the resolution, they may submit to the presiding judge a written complaint showing good cause, with specific objection to the Eldercaring Coordinator's conduct.
- b. Following notice and a finding of good cause, the judge shall hold a hearing at which the Eldercaring Coordinator will have the opportunity to respond to the complaint. The Eldercaring Coordinator may suspend services temporarily while the complaint is pending.
- c. The judge may remove the Eldercaring Coordinator, based upon the merit of the complaint and other related issues deemed necessary, and replace the Eldercaring Coordinator.
- d. If the judge finds the complaint without merit, the court may assess costs and attorney's fees against the party or parties submitting the complaint.
- e. The judge may forward the complaint to the regulatory body overseeing the Eldercaring Coordinator's qualifying licensure.

***X. Standards and Protocols: Describe accountability and procedures including standardized forms such as those examples provided below.***

The Supervisor of Family Court Services, the Director of Mediation/Arbitration and the Director of the Probate Division and providers will conduct meetings on a monthly basis in order to review the progress of cases, reassess the Pilot Project, develop standards and protocols, and create procedures and forms as needed.

The Supervisor of Family Court Services, the Director of Mediation/Arbitration and the Director of the Probate Division and providers will conduct meetings on a monthly basis in order to review the progress of cases, reassess the Pilot Project, develop standards and protocols, and create procedures and forms as needed.

Forms will be standardized according to the recommendations of the ACR Task Force on Eldercaring Coordination/FLAFCC Task Force on Eldercaring Coordination, including but not limited to the following specific forms:

- Order to Eldercaring Coordinator (Exhibit A)
- Response Form notifying the court of the acceptance of the case by the Eldercaring Coordinator (Exhibit B)
- Eldercaring Coordinator Report of an Emergency (Exhibit C)
- Eldercaring Coordinator Request for Status Conference (Exhibit D)
- Eldercaring Coordination Process Surveys (Exhibit E)

***XI. Budget: Explain what costs may be incurred, how the program would be funded as well as how costs could be defrayed.***

The costs to the Circuit for the Pilot Project are directly related to the time expended by the Supervisor of Family Court Services, the Director of Mediation/Arbitration and the Director of the Probate/Guardianship Division. However, inasmuch that their positions would include developing mechanisms and protocols that reduce court dockets, support the judiciary, and maximize

resources of the court, much of their time would be included within their current job descriptions. Peripheral costs incurred would be for the necessary equipment and supplies (e.g. lap top computer, phone, copier, paper, and conference room located on premises).

***XII. Oversight and Advisement: Include how oversight and overarching supervision will be provided, as well as guidance to optimize program execution and benefits.***

A Pilot Project Advisory Committee (“Eldercaring Coordination Advisory Committee”) will be created and may include all or some of the following possible members: one legal representative designated by the court’s Legal Counsel one attorney experienced in Elder Law;; one Elder Mediator qualified in eldercaring coordination; two Parenting Coordinators qualified in eldercaring coordination; one trainer in elder mediation; one professional Guardian; one geriatric care manager or social worker; one mental health professional who is licensed or certified by the regulatory body of her or his state, province, or jurisdiction and who meets ACR qualifications to be an Eldercaring Coordinator; and one expert in elder abuse, neglect and exploitation. The Director of the Probate Division, Director of Mediation/Arbitration, Director of Family Division, Supervisor of Family Court Services, one General Magistrate, and one Probate Judge will be standing members of the Committee. The purpose of the Eldercaring Coordination Advisory Committee will be to:

- provide guidance and consultation as the Pilot Project develops
- assist in the creation of forms, procedures and protocols upon request
- assist in the development of standards of practice
- assist in on-going assessment of Pilot Project
- provide evaluation of Pilot Project
- provide information and training in topics related to the Pilot Project
- promote ethical practices
- assist in the forging of collaborations of various professional disciplines that work with elders and their families

The Eldercaring Coordination Advisory Committee members will commit to quarterly meetings and to their availability for individual assistance upon request.

***XIII. Pilot Project Tasks and Responsibilities: Detail the developmental and operational task, who would perform them, deadline, and anticipated outcome.***

Key Activity	Responsible Person(s)	Time Frame	Outcome
<b>Selection of ECs</b>			
<b>Selection of Advisory Committee members</b>			
<b>Scheduling Elder Mediation training</b>			
<b>Creating procedures (Standing members of Advisory Committee to approve)</b>			
<b>Creating forms (Standing members</b>			

<b>of Advisory Committee to approve)</b>			
<b>Training of Probate Case Managers</b>			
<b>Training of Judiciary</b>			
<b>Coordinate on-going training in elder issues</b>			

***XIII. Pilot Project Completion and Review: Include term of project and project assessment process.***

The Pilot Project will be considered complete when twelve cases have completed the eldercaring coordination process through its term. The Advisory Committee may choose to extend this time period.

Once the Pilot Project is completed, an assessment of the Pilot Project will be conducted by the Advisory Committee and presented to the Administrative Judge of the Probate/Guardianship Division, the Administrative Judge of the Family Division, the Trial Court Administrator, and the Chief Judge.



**Exhibit: A**

IN THE CIRCUIT COURT OF THE \_\_\_\_\_  
JUDICIAL CIRCUIT IN AND FOR \_\_\_\_\_  
\_\_\_\_\_ COUNTY, STATE

Petitioner,

and

Respondent,

DIVISION:  
CASE NUMBER:  
SECTION:

\_\_\_\_\_/

**ORDER OF REFERRAL TO ELDERCARING COORDINATOR**

THIS MATTER having come before the Court upon:

- the Court's own Motion;
- Motion of the elder;
- Motion of parties other than the elder;
- Stipulation of the elder and other parties, or
- Motion by \_\_\_\_\_,

for Appointment of an Eldercaring Coordinator, the Court having reviewed the Motion and the Court file, taken the testimony presented, considered argument of counsel, and being otherwise duly advised in the premise, ***FINDS:***

**A. Eldercaring Coordination Process.** Eldercaring coordination is a dispute resolution process during which an Eldercaring Coordinator assists elders, legally authorized decision-makers, and others who participate by court order or invitation to resolve disputes with high conflict levels in a manner that respects the elder's need for autonomy and safety.

**B. Appropriateness of Process.** This matter is appropriate for eldercaring coordination and it is in the best interest of the elder: \_\_\_\_\_.

**C. Eldercaring Coordinator.** An Eldercaring Coordinator is an impartial third person whose role is to assist the parties by:

- Facilitating more effective communication, negotiation, and problem-solving skills;
- Offering education about elder care resources;
- Facilitating the creation, modification, or implementation of an elder care plan if such a plan is necessary to reach a resolution;
- Making recommendations for resolutions; and
- Making decisions within the scope of a court order or with the parties' prior approval.

**D. Selection of Eldercaring Coordinator.** The following Eldercaring Coordinator was selected by  parties' agreement  the court:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Email: \_\_\_\_\_

**E. History of Elder Abuse/Domestic Violence.** Based upon testimony and evidence presented, a review of related court records, or other representations made to the Court, the Court has determined:

- There is no history of elder abuse, neglect, or exploitation
- There is no history of domestic violence
- There has been a history of verified elder abuse, neglect, or exploitation
- There has been a history of domestic violence, and:
- Each party has had an opportunity to consult with an attorney or domestic violence advocate before this Court has accepted the parties' consent; and
- The elder and each party participating have consented to this referral and the consent has been given freely and voluntarily.

All confidentiality provisions in applicable statutes or Family Rules of Procedure continue to apply to the records made available to the court. The identity of any person reporting the abuse, neglect, or exploitation is not to be released.

It is therefore, **ORDERED**:

1. **Eldercaring Coordinator.** The elder and following parties are ordered to participate in the eldercaring coordination process: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The parties are required to contact the Eldercaring Coordinator within ten (10) working days of the date of this Order to schedule the first appointment.

a. The Eldercaring Coordinator is appointed to serve the Court for an initial period of \_\_\_\_\_ months (not to exceed two years). The Eldercaring Coordinator shall file a response to this Order within 30 working days accepting or declining the appointment. At any time, any party or the Eldercaring Coordinator may apply directly to the Court for a discharge and shall provide the parties and counsel with notice of the application of discharge.

b. The parties or their attorneys must provide to the Eldercaring Coordinator copies of all pleadings and orders filed in this case, as well as such pleadings and orders related to domestic violence, elder abuse, neglect, or exploitation, and any other pleadings and orders requested by the Eldercaring Coordinator related to eldercaring coordination.

2. **Meetings.** The Eldercaring Coordinator may recommend and, unless otherwise directed by the court, may invite others to participate in the eldercaring coordination process that may provide information, support, or other assistance in facilitating dispute resolution. The

Eldercaring Coordinator shall determine the schedule and location for appointments.

3. **Domestic Violence Safeguards.** The parties shall adhere to all provisions of any injunction for protection or conditions of bail, probation, or a sentence arising from criminal proceedings. In addition to any safety measures the Eldercaring Coordinator deems necessary, the following safeguards must be implemented to protect the parties during the process of eldercaring coordination:

- None are necessary.
- No joint meetings.
- No direct negotiations.
- No direct communications.
- Other: \_\_\_\_\_

4. **Role, Responsibility, and Authority of Eldercaring Coordinator.** The Eldercaring Coordinator shall have the following role, responsibility, and authority:

a. Facilitating the ability of the elder and other eldercaring coordination participants to work collaboratively in a way that respects the safety and autonomy of the elder. The Eldercaring Coordinator shall, for those purposes, initiate referrals for services and investigations if necessary and make recommendations to the parties as he/she deems appropriate.

b. Assisting the parties in creating, modifying and implementing an elder care plan, if necessary to reach a resolution.

c. Educating the parties and developing strategies to more effectively:

- i. Focus on the needs and care of the elder;
- ii. Minimize conflicts;
- iii. Communicate and negotiate with each other;
- iv. Understand the effects of conflict on the elder and each other;
- v. Disengage from another party when engagement leads to conflicts and non-cooperation;
- vi. Identify the sources of their conflict with each other and work individually and/or jointly to minimize conflict and lessen its deleterious effects on the elder; and
- vi. Allow the elder to live free from the threat of being caught in the middle of disputes regarding his or her care, needs and safety.

d. Assisting the elder and parties in identifying and utilizing resources that may assist them in resolving issues regarding the care, safety, and well-being of the elder.

e. Reporting or communicating with the Court concerning nonconfidential matters as provided in paragraph 10 of this order. In the event that the Eldercaring Coordinator is unable to adequately perform the duties in accordance with the court's direction, the Eldercaring Coordinator shall file a written request for status conference.

f. Providing information to health care practitioners and other professionals when the Eldercaring Coordinator deems it is reasonable and necessary.

g. Teaching eldercaring coordination participants communication skills, principles of adult development, and issues facing elders as they age.

5. **Communication:** The Eldercaring Coordinator may communicate with the parties separately or together, in person, by telephone, or any other means, unless otherwise prohibited by court order or applicable law. The Eldercaring Coordinator shall devise detailed guidelines or rules for communication and interaction among the participants and practice those rules with the participants.

6. **Releases of Information:** The Eldercaring Coordinator is entitled to communicate with the parties, health care providers, psychosocial providers, guardian, and any other third party deemed necessary by the Eldercaring Coordinator for the eldercaring coordination process. The participants will cooperate with the Eldercaring Coordinator and shall execute any necessary releases for communications related to the elder. In the event that any psychological evaluations, guardian reports, or any other reports related to the elder are prepared for any participant, the Eldercaring Coordinator may review such evaluations or reports. Furthermore, to the extent that any such evaluation or report is made confidential by any prior Order of the Court, then this Order shall authorize the release of said evaluation or report to the Eldercaring Coordinator.

7. **Scope of Authority.** The Eldercaring Coordinator shall make limited decisions within the scope of this order of referral, including:

\_\_\_\_\_

\_\_\_\_\_.

With expressed written consent of the elder and parties designated in this court order, the Eldercaring Coordinator may have additional temporary decision-making authority to resolve specific non-substantive disputes between the parties until such time as a court order is entered modifying the decision; or make recommendations to the court concerning modifications to orders related to the resolution of disputes regarding the care of the elder.

8. **Fees and Costs for Eldercaring Coordination.**

- a.  The parties have consented to this referral to eldercaring coordination.  
 This order is without consent of the parties, but the court has determined that the parties have the financial ability to pay the eldercaring coordination fees and costs.  
 This order is without the consent of the parties. The Court has determined that one or more of the parties are indigent, but there are public and/or private funds available to pay the indigent parties' allocated portion of the fees.

b. The Court allocates payment of fees and costs for eldercaring coordination as follows:

\_\_\_\_\_ % shall be paid by \_\_\_\_\_.

\_\_\_\_\_ % shall be paid by \_\_\_\_\_.

\_\_\_\_\_ % shall be paid by \_\_\_\_\_.

\_\_\_\_\_ % shall be paid by \_\_\_\_\_.

Other: \_\_\_\_\_

c. If a party has caused the Eldercaring Coordinator to expend an unreasonable and unnecessary amount of time that party may be solely responsible for payment of the Eldercaring Coordinator's fees and costs for such time expended. Failure to pay the Eldercaring Coordinator's fees and costs in a timely manner may subject the party to sanctions for contempt of court.

d. The Eldercaring Coordinator shall not commence the eldercaring coordination process until he/she is satisfied with the terms and conditions of payment for his/her services. Further, the Eldercaring Coordinator shall not perform nor continue to perform the eldercaring coordination services in this case unless all of his/her fees and costs are paid by the parties as ordered, and, in the event of nonpayment, the Eldercaring Coordinator shall file a Request for Status Conference, and the Court will address the issue of non-payment of fees and costs.

9. **Confidentiality.** All communications made among the parties or between any party and the Eldercaring Coordinator during the eldercaring coordination process cannot be kept confidential from any other parties involved in the eldercaring coordination process. All communications are confidential to parties outside the eldercaring coordination process. However, the Eldercaring Coordinator has a duty to report any suspected abuse, neglect or exploitation required or permitted by applicable law. The Eldercaring Coordinator and each party may not testify or offer evidence about communications made by a party or the Eldercaring Coordinator during the eldercaring coordination meetings, except if:

a. It is necessary to identify, authenticate, confirm, or deny a written agreement entered into by the parties during eldercaring coordination;

b. The testimony or evidence is necessary to identify an issue for resolution by the Court without otherwise disclosing communications made by any party or the Eldercaring Coordinator;

c. The testimony or evidence is limited to the subject of a party's adherence to the Order of Referral to Eldercaring Coordinator or other orders of the Court that are pertinent to the eldercaring coordination process.

d. The Eldercaring Coordinator is reporting that the case is unsafe or no longer appropriate for eldercaring coordination;

e. The Eldercaring Coordinator is reporting that he or she is unable or unwilling to continue to serve and that a successor Eldercaring Coordinator should be appointed;

f. The Eldercaring Coordinator is not qualified to address or resolve certain issues in the case and a more qualified Coordinator should be appointed;

g. All participants and the Eldercaring Coordinator agree that the testimony or evidence be permitted; or

h. The testimony, evidence, or report is necessary to protect any person from current future acts that would constitute abuse, neglect, or exploitation of an elder.

10. **Agreement on Non-confidentiality.** The participants can agree to waive confidentiality of a specific communication or all communications. The waiver must be in writing, signed by the participants and their respective counsel. The waiver shall be filed with the Court and a copy served on the Eldercaring Coordinator. Any participant may revoke his or her waiver of confidentiality by providing written notice signed by the participant. The revocation shall be filed with the Court and a copy served on the other participants and the Eldercaring Coordinator. The Eldercaring Coordinator may submit a written report or other written communication regarding any nonconfidential matter to the court.

11. **Testimony and Discovery.** An Eldercaring Coordinator shall not be called to testify or be subject to the discovery rules of this circuit or jurisdiction unless the court makes a prior finding of good cause. A party must file a motion, alleging good cause why the court should allow the Eldercaring Coordinator to testify or be subject to discovery. The requesting party shall serve the motion and notice of hearing on the Eldercaring Coordinator. The requesting party shall initially be responsible for the Eldercaring Coordinator's fees and costs incurred as a result of the motion.

12. **Withdrawal Procedure.** With Court approval, the Eldercaring Coordinator may withdraw from the role of Eldercaring Coordinator. The Eldercaring Coordinator shall apply directly to the Court with a request to be discharged, and shall provide notice to the participants and their counsel of the request to withdraw.

13. **Complaint Procedure:** A party may make a written complaint to an Eldercaring Coordinator regarding the Coordinator's conduct. After a party reviews a written complaint with the Eldercare Coordinator, if the complaint has not been resolved to the party's satisfaction that party may seek to terminate the services of a court-appointed Eldercaring Coordinator by filing a motion with the Court. The presiding judge may remove the Eldercaring Coordinator from the case, and upon a finding of good cause, may refer the complaint to the state's, province's, or jurisdiction's regulatory body overseeing any professional license or certification held by the Eldercaring Coordinator. The court may also appoint a substitute Eldercaring Coordinator. The Eldercaring Coordinator's services may not be terminated by any of the parties, or at the request of all parties, without order of this Court.

14. **Stipulation:** any written stipulation of parties to utilize the eldercaring coordination process filed with this court is incorporated into this Order.

14. **Reservation of Jurisdiction.** This Court specifically reserves jurisdiction to enforce and/or modify the terms and conditions of this Order.

DONE AND ORDERED in \_\_\_\_\_ County, State,

on this \_\_\_\_ day of \_\_\_\_\_, 201\_\_.

\_\_\_\_\_  
Circuit Judge

Copies to:

Name of Party:  
Counsel for Party  
Address of Counsel

Name of Party:  
Counsel for Party  
Address of Counsel

Other:

**Exhibit: B**

IN THE CIRCUIT COURT OF THE \_\_\_\_\_  
JUDICIAL CIRCUIT IN AND FOR  
\_\_\_\_\_ COUNTY, STATE

Petitioner,

and

DIVISION:  
CASE NUMBER:  
SECTION:

Respondent.

\_\_\_\_\_ /

**RESPONSE BY ELDERCARING COORDINATOR**

I, {name} \_\_\_\_\_, notify the Court and affirm the following:

1. Acceptance: [check **one** only]

I accept the appointment as Eldercaring Coordinator.

I decline the appointment as Eldercaring Coordinator.

2. Qualifications: [check **one** only]

I meet the qualifications as an Eldercaring Coordinator recommended by the Association for Conflict Resolution Task Force on Eldercaring Coordination.

I do not meet the qualifications recommended by the Association for Conflict Resolution. However, the parties have chosen me by mutual consent and I believe I can perform the services of an Eldercaring Coordinator because:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. I am not aware of any conflict, circumstance, or reason that renders me unable to serve as the Eldercaring Coordinator in this matter and I will immediately inform the court and the parties if such arises.

4. I understand my role, responsibility, and authority under the Order Referring Parties to Eldercaring Coordinator dated \_\_\_\_/\_\_\_\_/\_\_\_\_.

**I hereby affirm the truth of the statements in this acceptance and understand that if I make any false representations in this acceptance, I am subject to sanctions by the Court.**

Date \_\_\_\_\_

\_\_\_\_\_  
Signature of Eldercaring Coordinator  
Printed Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Professional License or Certification # \_\_\_\_\_  
Name and location of regulatory body issuing professional  
license or certification

Copies to:

\_\_\_\_ Presiding Judge \_\_\_\_\_  
\_\_\_\_ Petitioner \_\_\_\_\_  
\_\_\_\_ Attorney for Petitioner \_\_\_\_\_  
\_\_\_\_ Respondent \_\_\_\_\_  
\_\_\_\_ Attorney for Respondent \_\_\_\_\_  
\_\_\_\_ Other: \_\_\_\_\_



**Exhibit: C**

IN THE CIRCUIT COURT OF THE \_\_\_\_\_  
JUDICIAL CIRCUIT IN AND FOR \_\_\_\_\_  
COUNTY, STATE

Petitioner,

and

DIVISION:  
CASE NUMBER:  
SECTION:

Respondent.

\_\_\_\_\_ /

**ELDERCARING COORDINATOR REPORT OF AN EMERGENCY**

The undersigned Eldercaring Coordinator reports an emergency to the court:

1. \_\_\_\_ With notice to the parties. A party has obtained a final order or injunction of protection against domestic violence or has been arrested for an act of domestic violence, elder abuse, neglect or exploitation.
2. \_\_\_\_ Without notice to the parties pursuant to applicable law or Family Law Rule of Procedure
  - a. \_\_\_\_ There is a reasonable cause to suspect the elder has or is being abused, neglected, or exploited, or the elder's health, safety and well-being are in immediate jeopardy.
  - b. \_\_\_\_ There is a reasonable cause to suspect that a child will suffer or is suffering abuse, neglect, or abandonment.
  - c. \_\_\_\_ A participant of the eldercaring coordination, or someone acting on the elder's behalf, is expected to wrongfully remove or is wrongfully removing the elder from the jurisdiction of the court without prior approval of the court.
  - d. \_\_\_\_ It is necessary to protect any person from future acts that would constitute domestic violence or abuse, neglect, or exploitation of an elderly or disabled adult.
  - e. \_\_\_\_ There is a pending investigation by the Adult or Child Protective Services.

3. Describe the emergency:

\_\_\_\_\_  
\_\_\_\_\_

**VERIFICATION BY ELDERCARING COORDINATOR** Emergency is true and correct to the best of my knowledge and belief.

Date \_\_\_\_\_  
Signature of Eldercaring Coordinator  
Printed Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Telephone Number: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Professional License or Certification # \_\_\_\_\_  
Name and location of regulatory body issuing professional license or certification

STATE OF STATE  
COUNTY OF \_\_\_\_\_

Sworn to or affirmed and signed before me on \_\_\_\_\_ by \_\_\_\_\_.

\_\_\_\_\_  
NOTARY PUBLIC or DEPUTY CLERK

\_\_\_\_\_  
[Print, type, or stamp commissioned name of notary or deputy clerk.]

\_\_\_\_\_ Personally known  
\_\_\_\_\_ Produced identification

Type of identification produced \_\_\_\_\_

Copies to:

\_\_\_\_\_ Presiding Judge \_\_\_\_\_  
\_\_\_\_\_ Petitioner \_\_\_\_\_  
\_\_\_\_\_ Attorney for Petitioner \_\_\_\_\_  
\_\_\_\_\_ Respondent \_\_\_\_\_  
\_\_\_\_\_ Attorney for Respondent \_\_\_\_\_  
\_\_\_\_\_ Other: \_\_\_\_\_

**Exhibit: D**

IN THE CIRCUIT COURT OF THE 11TH  
JUDICIAL CIRCUIT IN AND FOR DADE  
COUNTY, STATE

Petitioner,

and

DIVISION:  
CASE NUMBER:  
SECTION:

Respondent.

\_\_\_\_\_ /

**ELDERCARING COORDINATOR REQUEST FOR STATUS CONFERENCE**

The undersigned Eldercaring Coordinator requests a status conference in this case:  
(choose all that apply)

1. \_\_\_\_ To request direction from the court concerning: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_.

2. \_\_\_\_ To request resolution by the court regarding: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_.

3. \_\_\_\_ To report adherence of \_\_\_\_\_ to the Order of Referral to Eldercaring Coordinator, orders for psychological evaluation, counseling ordered by the court or recommended by a health care provider, or for substance abuse testing or treatment.

4. \_\_\_\_ To report that the case is no longer appropriate for eldercaring coordination.

5. \_\_\_\_ To report that the undersigned Eldercaring Coordinator is not qualified to address or resolve certain issues in this case and a more qualified successor Eldercaring Coordinator should be appointed.

6. \_\_\_\_ The undersigned Eldercaring Coordinator is unable or unwilling to continue to serve and a successor Eldercaring Coordinator should be appointed.

WHEREFORE, the undersigned Eldercaring Coordinator requests that a Status Conference be set by the Court.

Date \_\_\_\_\_

\_\_\_\_\_  
Signature of Eldercaring Coordinator

\_\_\_\_\_  
Signature of Eldercaring Coordinator

Printed Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

E-mail: \_\_\_\_\_

Professional License or Certification # \_\_\_\_\_

Name and location of regulatory body issuing professional  
license or certification

Copies to:

\_\_\_\_\_ Presiding Judge \_\_\_\_\_

\_\_\_\_\_ Petitioner \_\_\_\_\_

\_\_\_\_\_ Attorney for Petitioner \_\_\_\_\_

\_\_\_\_\_ Respondent \_\_\_\_\_

\_\_\_\_\_ Attorney for Respondent \_\_\_\_\_

\_\_\_\_\_ Other: \_\_\_\_\_

## APPENIDX D:

### **Eldercaring Coordination Pilot Project Assessment Tool Pre- and Post Surveys for Elders, Other Participants, and Eldercaring Coordinators**

The Association for Conflict Resolution (ACR) Task Force on Eldercaring Coordination has been dedicated to the development of eldercaring coordination and provided Guidelines for Eldercaring Coordinators including training protocols and an Eldercaring Coordination Court Pilot Project Proposal to assist in its responsible implementation by court circuits, programs and providers. The Eldercaring Coordination Pilot Project Assessment Tool was developed through a collaboration of the ACR Task Force on Eldercaring Coordination and the Florida Chapter of the Association of Family and Conciliation Courts Task Force on Eldercaring Coordination as a template for circuits, providers and programs to use in order to retrieve helpful information that may guide the course of eldercaring coordination. It encompasses questions which target responses regarding areas such as:

- Demographics
- Expectations of the process
- Fees and affordability
- Initial stage of the eldercaring coordination process
- Safety concerns
- Perceptions of the eldercaring coordination experience
- The Eldercaring Coordinator
- Overview of the process
- Outcome of the eldercaring coordination process

Various options for questions and possible responses are presented. It is expected that the surveys will be utilized in ways that best meet the needs of the participants, court circuits, programs and providers. The questions posted are for data collection purposes only and not endorsing any practices or activities that are referenced.

Further development of the Eldercaring Coordination Pilot Project Assessment Tool will take place in Stage Two of this project, including possible reformatting for hard copy, Survey Monkey and oral implementation. Explanation and instructions for each method of delivery will be developed as well.

For more information, please contact ACR Task Force on Eldercaring Coordination Co-Chairs:

Linda Fieldstone, M.Ed.  
305-349-5589  
Lfieldstone@jud11.flcourts.org

Sue Bronson, LCSW  
414-291-9487  
sbronson@wi.rr.com

## PRE-SURVEY: QUESTIONS FOR ELDER

This interview would be given to the Elder within one week after the process has begun, to ensure their initial participation. *The questions posted are for data collection purposes only and not endorsing any practices or activities that are referenced.*

### DEMOGRAPHICS

**What is your age?**

- 50-59 years
- 60-65 years
- 66-70 years
- 71-75 years
- 76-80 years
- 80-85 years
- 85-90 years
- 91 years or older

**What is the location of your birth?**

City \_\_\_\_\_  
State/Province \_\_\_\_\_  
Country \_\_\_\_\_

**What is your gender?**

- Female
- Male
- Transgender
- Other (please specify): \_\_\_\_\_

**What is your primary language?**

- African \_\_\_\_\_
- American Indian \_\_\_\_\_
- Arabic
- Chinese \_\_\_\_\_
- Other Asian \_\_\_\_\_
- Creole
- English
- French
- German
- Italian
- Spanish
- Other European \_\_\_\_\_
- Hindi or Urdu
- Russian
- Hebrew
- Yiddish
- Other \_\_\_\_\_

**What is your race and ethnicity? Check as many that apply**

- American Indian, Alaska Native, Aboriginal or First Nations
- Asian
- Black, African American or Afro Canadian

- Hispanic or Latino(a)
- Native Hawaiian or other Pacific Islander
- White (non-Hispanic or Latino/a)
- Other (please specify): \_\_\_\_\_

**OPTIONAL: What is your sexual orientation?**

- Bisexual
- Lesbian or gay
- Straight/heterosexual
- Other (please specify): \_\_\_\_\_

**OPTIONAL: What is your current religious/spiritual affiliation?**

- Agnostic
- Atheist
- Buddhist
- Catholic
- Hindu
- Jewish
- Muslim
- Pagan
- Protestant
- Other (please specify): \_\_\_\_\_

**What is your current relationship status?**

- Single, never married
- Married/Living with legally recognized partner
- Living with significant other/partner without legal rights
- Have significant other/partner with whom you don't live
- Separated
- Divorced
- Widowed
- Other (please specify): \_\_\_\_\_

If married more than once, how many times were you married?

- Two
- Three
- Four
- More than four

If widowed (e.g. spouse or legally recognized partner passed away), how many times did this occur?

- Once
- Twice
- Three times
- More than three times

**How many biological or adopted child(ren) do you have:**

- None
- One
- Two
- Three
- Four or more

**How many step-child(ren) do you have:**

- None
- One
- Two
- Three
- Four or more

With how many partners:  One  Two  Three  Four or more

**With whom do you reside:**

- By yourself
- With your spouse/partner with legal rights
- With your significant other/partner without legal rights
- With your sibling
- With your child
- With your parent
- With a friend
- With other: \_\_\_\_\_

**Do you reside in:**  House  Apartment/Condo  Independent Living Facility  
 Assisted Living Facility or group home  Nursing home  Treatment facility  
 Other: \_\_\_\_\_

**How do you currently spend your days:**

Alone at home  At work  
 With caregiver day time  With caregiver overnights  
 At senior center or adult day program  In nursing home  
 In treatment facility  Other: \_\_\_\_\_

**Where do you reside?**

City \_\_\_\_\_  
State/Province \_\_\_\_\_  
Country \_\_\_\_\_

**Are you currently?**  Employed  Retired  Homemaker

Type of Job or Profession: \_\_\_\_\_

**Education (check highest amount of education obtained):**

Some high school or less  Completed high school  
 Technical or skill training  Some college  Completed college  
 Graduate degree

**Do you have the following? (check all that apply)**

Will  Trust  Advance Health Care Directive/Living Will  
 Medical Surrogate/Health Care Agent  
 Financial Power of Attorney  Guardian  
 Other \_\_\_\_\_

**What accommodations would enable you to participate most fully in the eldercaring coordination process?**

No accommodations are needed  
If yes:  Ramp or elevator  Printed materials with larger writing  
 Handrails in bathroom  Wheelchair/walker accessibility  Wide chairs  
 Snacks/beverage  Comfortable room temperature  Interpreter  
 Printed materials in a language other than English  
 Assisted listening device  
 Other: \_\_\_\_\_

**ELDERCARING COORDINATOR**

**What age is your Eldercaring Coordinator:**

25-35 years  36-45 years  46-55 years  55-65 years  over 65 years

Do you wish your Eldercaring Coordinator had been:

Younger  Older  Doesn't matter

**Is your Eldercaring Coordinator**  Male  Female

Would you prefer someone of a different gender  Yes  No  Doesn't matter

**Language: Does the Eldercaring Coordinator speak your primary language?**



Yes  No  Doesn't matter

## ELDERCARE COORDINATION PROCESS

Is your eldercaring coordination process:  Court ordered  Voluntary

### How did you first hear about eldercaring coordination?

- Judge  Court Program  Attorney  Guardian  Mediator  Doctor  
 Geriatric Care Manager  Patient Advocate  Social Worker  Psychologist  
 Marriage and Family Therapist  Other mental health provider  Clergy  
 Friend  Family Member  Other, who (role or relationship)? \_\_\_\_\_

How did the Eldercaring Coordinator explain the process of eldercaring coordination to you? (Check all that apply)  In writing  In person  Separately  Jointly with other participants in the eldercaring coordination process  Never explained the process at all

### Did anyone explain the process to you in addition to the Eldercaring Coordinator? (Check all that apply)

- Judge  Court Program  Attorney  Guardian  Mediator  Doctor  
 Geriatric Care Manager  Patient Advocate  Social Worker  Psychologist  
 Marriage and Family Therapist  Other mental health provider  
 Friend  Family Member  Other, who (role or relationship)? \_\_\_\_\_

Do you think you understand the process now that you are about to begin eldercaring coordination?  Yes  No

### Who was court ordered to participate with you in the eldercaring coordination process (check all that apply):

- Not applicable because process was voluntary  
 Your sibling(s)  Your step-sibling(s)  
 Your current spouse/legally recognized partner  
 Your partner/significant other without legal recognition  
 Your previous spouse(s), partner(s), or significant other(s)  
 Your child(ren)  Your step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of your child(ren)  
 Spouse(s), partner(s) or significant other(s) of your step-child(ren)  
 Extended family  Friend(s)  Non-related caregiver(s)  
 Patient Advocate  Medical Surrogate  Power of Attorney  
 Doctor  Nurse  Geriatric Care Manager  Social Worker  
 Psychologist  Marriage and Family Therapist  Other mental health provider  
 Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy  
 Business partner(s)  Funeral Director  Realtor  
 Other: \_\_\_\_\_  
 I don't know

### Who was invited to participate in the eldercaring coordination process (check all that apply):

- No one thus far  
 Your sibling(s)  Your step-sibling(s)  
 Your current spouse/legally recognized partner  
 Your partner/significant other without legal recognition

- Your previous spouse(s), partner(s), or significant other(s)
- Your child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_
- I don't know

## OVERVIEW OF THE REFERRING ISSUES

### There is conflict between: (check all that apply)

- You  Your sibling(s)  Your step-sibling(s)
- Your current spouse/legally recognized partner
- Your partner/significant other without legal recognition
- Your previous spouse(s), partner(s), or significant other(s)
- Your child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Funeral Director  Realtor
- Other: \_\_\_\_\_
- I don't know

How long has each conflict been going on?

#1 Conflict between \_\_\_\_\_

- Recent  Up to two years  Two to five years  More than five years

When did the conflict begin? (check all that apply)

- Since your siblings began arguing
- Since your current marriage/partner with legal rights
- Since your previous marriage
- Since your previous relationship with a partner or significant other
- Since your child(ren) were young
- Since your step-child(ren) joined the family
- Since your physical health declined
- Since your memory loss began
- Since your mental health concerns began
- Since business issues began  Since financial issues began
- Other: \_\_\_\_\_

How or with whom have you tried to resolve conflict in the past (check all that apply)

- Court  Elder Mediation  Attorney  Family member  Friend
- Doctor  Nurse  Nonrelated caregiver  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health professional
- Geriatric Care Manager  Clergy  Police
- Other: \_\_\_\_\_

#2 Conflict between \_\_\_\_\_

- Recent  Up to two years  Two to Five years  As long as you can remember

When did the conflict begin? (check all that apply)

- Since your siblings began arguing
- Since your current marriage/partner with legal rights
- Since your previous marriage
- Since your previous relationship with a partner or significant other
- Since your child(ren) were young
- Since your step-child(ren) joined the family
- Since your physical health declined
- Since your memory loss began
- Since your mental health concerns began
- Since business issues began  Since financial issues began
- Other: \_\_\_\_\_

How or with whom have you tried to resolve conflict in the past (check all that apply)

- Court  Elder Mediation  Attorney  Family member  Friend
- Doctor  Nurse  Nonrelated caregiver  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health professional
- Geriatric Care Manager  Clergy  Police
- Other: \_\_\_\_\_

#3 Conflict between \_\_\_\_\_

- Recent  Up to two years  Two to five years  As long as you can remember

When did the conflict begin? (check all that apply)

- Since your siblings began arguing
- Since your current marriage/partner with legal rights
- Since your previous marriage
- Since your previous relationship with a partner or significant other
- Since your child(ren) were young
- Since your step-child(ren) joined the family
- Since your physical health declined
- Since your memory loss began
- Since your mental health concerns began
- Since business issues began  Since financial issues began
- Other: \_\_\_\_\_

How or with whom have you tried to resolve conflict in the past (check all that apply)

- Court  Elder Mediation  Attorney  Family member  Friend
- Doctor  Nurse  Nonrelated caregiver  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health professional

- Geriatric Care Manager    Clergy    Police  
 Other: \_\_\_\_\_

**What major issues do you want to resolve through the eldercaring coordination process? (check all that apply)**

- Family conflict in general    Your exposure to conflict    Your safety  
 Your place of residence    Who is able to spend time with you    Your finances  
 Who makes decisions for you    Your material possessions  
 Who provides care for you    Your doctor or treatment  
 Coping with your memory loss    Coping with your decline in physical health  
 Coping with your mental health    Other: \_\_\_\_\_

**SAFETY CONCERNS**

**Do you have any concerns about your safety or the safety of any others participating in the eldercaring coordination process?**  Yes  No

**What safety concerns did you or your family have in the past? (Check all that apply)**

- Elder abuse    Elder neglect    Domestic Violence  
 Violence between other members of your family  
 Coercion    Deception    Exploitation    Extortion/blackmail    Fraud  
 Kidnapping    Robbery    Stalking    Substance abuse  
 Other: \_\_\_\_\_

#1 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified (check all that apply):

- Police    Adult Protective Services or Child Protective Services  
 Court    Other: \_\_\_\_\_

#2 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified (check all that apply):  Police

- Doctor    Adult Protective Services or Child Protective Services  
 Court    Other: \_\_\_\_\_

#3 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified (check all that apply):  Police

- Doctor    Adult Protective Services or Child Protective Services  
 Court    Other: \_\_\_\_\_

#4 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified (check all that apply):  Police

- Doctor    Adult Protective Services or Child Protective Services

Court  Other: \_\_\_\_\_

### FEES/AFFORDABILITY

**OPTIONAL: Your yearly income, including investments (choose closest figure):**

Under \$10,000  \$25,000  \$50,000  \$75,000  
 \$100,000  \$150,000  \$200,000  Over \$200,000  I don't know

**Are you on:**  Social Security  Other public benefit  Fixed income

**Do you have (check all that apply)**

Social Security  Other public benefits (such as SSI, SSDI, food stamps or housing subsidy)  
 Fixed income  Own house  Pension/IRA/Profit-sharing plans/other retirement plans  
 Life insurance  Additional assets

**Do you have (check all that apply)**

Medicaid  Medicare  Private Health Insurance  Veteran's Health Benefits  
 Long Term Care Insurance

**What are the Eldercaring Coordinator's fees?**

Less than \$50 per hour  Up to \$75 per hour  Up to \$100 per hour  
 Up to \$125 per hour  Up to \$150 per hour  Up to \$175 per hour  
 Up to \$200 per hour  Up to \$250 per hour  Up to \$300 per hour  
 More than \$300 per hour  I don't know

**Did the Eldercaring Coordinator charge a retainer?**  Yes  No  I don't know

**Fees are (check all that apply):**

Paid fully by one party  Shared equally  Split according to ability to pay  
 No fee being charged  Designated by court order  Decided voluntarily  
 I don't know  Other: \_\_\_\_\_

**Who is paying for the eldercaring coordination process? (Check all that apply)**

You  Your sibling(s)  Your step-siblings  
 Your child(ren)  Your step-child(ren)  
 Your current spouse/legally recognized partner  
 Your partner/significant other without legal recognition  
 Your extended family member(s)  Your friend(s)  
 Other: \_\_\_\_\_  
 I don't know

### INITIAL ELDERCARING COORDINATION EXPERIENCE

**Do you feel pressured to participate in eldercaring coordination?**  Yes  No

**Are you entering into the process by your own free will?**  Yes  No

**List possible parties you think may be helpful to invite to the eldercaring coordination process (check all that apply):**

Your sibling(s)  Your step-sibling(s)  
 Your current spouse/legally recognized partner  
 Your partner/significant other without legal recognition

- Your previous spouse(s), partner(s), or significant other(s)
- Your child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_
- I don't know

**List any parties you think may impede the eldercaring coordination process (check all that apply):**

- Your sibling(s)  Your step-sibling(s)
- Your current spouse/legally recognized partner
- Your partner/significant other without legal recognition
- Your previous spouse(s), partner(s), or significant other(s)
- Your child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_
- I don't know

**Do you think that everyone who has been involved in your dispute is participating in your eldercaring coordination process thus far?**  Yes  No

Who is left out? \_\_\_\_\_  
 I don't know

**Are you given enough time to voice your concerns?**  Yes  No

**Do you feel safe as you think about beginning this process?**  Yes  No

If not, what could help you feel safer as you begin the eldercaring coordination process? \_\_\_\_\_

**EXPECTATIONS OF THE ELDERCARING COORDINATION PROCESS**

**Are you hopeful that eldercaring coordination will improve your situation?**

Yes  No  I don't know

**How likely do you think it is that your hopes will be realized?**

Won't help at all  Not likely to help  Things will probably stay the same  Might help  
 Very likely to help  I don't know

Depending on your answer, why do you think eldercaring coordination will help or why do you think it won't help? \_\_\_\_\_

**How likely do you think it is that relationships between the people involved in the eldercaring coordination process are going to get better?**

- Won't help at all    Not likely to help    Things will probably stay the same    Might help  
 Very likely to help    I don't know

**What words best describe how you feel as you prepare to begin the eldercaring coordination process? (check all that apply)**

- Hopeful    Safe    Confused    Worried    Scared  
 Empowered    Other: \_\_\_\_\_

**Are there logistical factors or suggestions you have that might positively influence or enhance the eldercaring coordination process?**

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**PRE-SURVEY: QUESTIONS FOR PARTICIPANTS OTHER THAN ELDER**

This interview would be given to each participant, other than the elder, within one week after the process has begun, to ensure their initial participation. *The questions posted are for data collection purposes only and not endorsing any practices or activities that are referenced.*

**DEMOGRAPHICS**

**What is your age?**

- Under 30
- 30-39 years
- 40-49 years
- 50-59 years
- 60-69 years
- 70-80 years
- 80 years plus

**What is your gender?**

- Male
- Female
- Transgender
- Other (please specify): \_\_\_\_\_

**What is your primary language?**

- African\_\_\_\_\_
- American Indian\_\_\_\_\_
- Arabic
- Chinese\_\_\_\_\_
- Other Asian\_\_\_\_\_
- Creole
- English
- French
- German
- Italian
- Spanish
- Other European\_\_\_\_\_
- Hindi or Urdu
- Russian
- Hebrew
- Yiddish
- Other\_\_\_\_\_

**What is your race and ethnicity? Check as many that apply**

- American Indian, Alaska Native, Aboriginal or First Nations
- Asian
- Black, African American or Afro Canadian
- Hispanic or Latino(a)
- Native Hawaiian or other Pacific Islander
- White (non-Hispanic or Latino/a)
- Other (please specify): \_\_\_\_\_



**What is the highest level of education you obtained?:**

- Some high school or less    Completed high school  
 Technical or skill training    Some college    Completed college  
 Graduate degree

**RELATIONSHIP TO THE ELDER**

**What is your relationship to the elder?**

- Sibling    Step-sibling    Current spouse/partner with legal rights  
 Partner/significant other without any legal rights  
 Previous spouse/partner with legal rights  
 Previous partner/significant other without legal recognition  
 Adult child    Adult step-child    Spouse, partner or significant other of elder's child  
 Spouse, partner, or significant other of elder's step-child    Extended family  
 Friend    Non-related caregiver    Attorney    Guardian    Clergy  
 Doctor    Nurse    Financial Advisor    Patient Advocate  
 Guardian    Power of Attorney    Medical Surrogate    Social Worker  
 Psychologist    Marriage & family therapist    Other mental health provider  
 Geriatric Care Manager    Mental Health Provider    Funeral Director  
 Accountant    Business partner    Attorney    Mediator    Realtor

Other: \_\_\_\_\_

**How long have you known the elder?**

- Your whole life    Since childhood    Since adolescence  
 Up to 50 years    Up to 40 years    Up to 30 years  
 Up to 20 years    Up to 10 years    Up to 5 years  
 Up to 3 years    One year or less

**How often have you seen the elder this past year?**

- Reside with elder    More than once a week    Once a week  
 Twice a month    Once a month    Once every other month  
 Once in three months    Once in six months    One time in the past year  
 Less than once a year

**Are you a caregiver for the elder?**    Yes    No

If yes, on a regular basis what caregiving task(s) do you provide? Check all that apply:

- Transportation    Clean home    Pay bills  
 Go to movies/entertainment  
 Share activities in elder's home (cards, games, watch TV)  
 Prepare meals    Feed    Bathe or provide other personal care  
 Provide medical care    Coordinate health care or social services  
 Other: \_\_\_\_\_

**Do you have decision-making authority for the elder?**    Yes    No

If yes, for what? \_\_\_\_\_

Who gave you this decision-making authority?    The elder    The court

**Were you court ordered to participate in the eldercaring coordination process?**

- Yes    No

**Are you an invited guest to eldercaring coordination meetings?**    Yes    No

## ELDERCARING COORDINATOR

### What age is your Eldercaring Coordinator:

25-35 years  36-45 years  46-55 years  55-65 years  over 65 years

Do you wish your Eldercaring Coordinator had been:

Younger  Older  Doesn't matter

Is your Eldercaring Coordinator  Male  Female

Would you prefer someone of a different gender  Yes  No  Doesn't matter

Language: Does the Eldercaring Coordinator speak your primary language?

Yes  No  Doesn't matter

## ELDERCARING COORDINATION PROCESS

Is your eldercaring coordination process:  court ordered  voluntary

### How did you first hear about eldercaring coordination?

Judge  Court Program  Attorney  Guardian  Mediator  Doctor  
 Geriatric Care Manager  Patient Advocate  Social Worker  Psychologist  
 Marriage and Family Therapist  Other mental health provider  Clergy  
 Friend  Family Member  Other, who (role or relationship)? \_\_\_\_\_

How did the Eldercaring Coordinator explain the process of eldercaring coordination for you?  In writing  In person  Both in writing and in person

Never explained the process at all

Did anyone explain the process to you in addition to the Eldercaring Coordinator?

(Check all that apply)

Judge  Court Program  Attorney  Guardian  Mediator  Doctor  
 Geriatric Care Manager  Patient Advocate  Social Worker  Psychologist  
 Marriage and Family Therapist  Other mental health provider  
 Friend  Family Member  Other, who (role or relationship)? \_\_\_\_\_

Do you think you understand the process now that you are about to begin eldercaring coordination?  Yes  No

Who was court ordered to participate with you in the eldercaring coordination process

(check all that apply):

Not applicable because process was voluntary  
 Elder's sibling(s)  
 Elder's current spouse/partner with legal rights  
 Elder's partner/significant other without legal rights  
 Elder's previous spouse(s), partners or significant others  
 Elder's biological child(ren)  Elder's step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)  
 Extended family  Friend(s)  Non-related caregiver(s)  
 Patient Advocate  Medical Surrogate  Power of Attorney  
 Doctor  Nurse  Geriatric Care Manager  Social Worker  
 Psychologist  Marriage and Family Therapist  Other mental health provider

- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_
- I don't know
- Other: \_\_\_\_\_

**Who is being invited to participate in the eldercaring coordination process (check all that apply):**

- No one yet
- Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)  Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_
- I don't know
- Other: \_\_\_\_\_

**OVERVIEW OF THE REFERRING ISSUES**

**There is conflict between: (check all that apply)**

- Elder  Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)  Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_
- I don't know

**How long has each conflict been going on?**

**#1 Conflict between** \_\_\_\_\_

- Recent  Up to two years  Two to five years  More than five years

When did the conflict begin? (check all that apply)

- Since elder's siblings began arguing

- Since elder's current marriage/partner with legal rights
- Since elders' previous marriage
- Since elders' previous relationship with a partner or significant other
- Since elder's child(ren) were young
- Since elder's step-child(ren) joined the family
- Since elder's physical health issues declined
- Since elder's memory loss began  Since mental health concerns began
- Since business issues began  Since financial issues began
- Other: \_\_\_\_\_

How or with whom have you tried to resolve conflict in the past (check all that apply)

- Court  Elder Mediation  Attorney  Family member  Friend
- Doctor  Nurse  Nonrelated caregiver  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health professional
- Geriatric Care Manager  Clergy  Police
- Other: \_\_\_\_\_

**#2 Conflict between** \_\_\_\_\_

- Recent  Up to two years  Two to Five years  More than five years

When did the conflict begin? (check all that apply)

- Since elder's siblings began arguing
- Since elder's current marriage/partner with legal rights
- Since elders' previous marriage
- Since elders' previous relationship with a partner or significant other
- Since elder's child(ren) were young
- Since elder's step-child(ren) joined the family
- Since elder's physical health issues declined
- Since elder's memory loss began  Since mental health concerns began
- Since business issues began  Since financial issues began
- Other: \_\_\_\_\_

How or with whom have you tried to resolve conflict in the past (check all that apply)

- Court  Elder Mediation  Attorney  Family member  Friend
- Doctor  Nurse  Nonrelated caregiver  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health professional
- Geriatric Care Manager  Clergy  Police
- Other: \_\_\_\_\_

**#3 Conflict between** \_\_\_\_\_

- Recent  Up to two years  Two to five years  More than five years

When did the conflict begin? (check all that apply)

- Since elder's siblings began arguing
- Since elder's current marriage/partner with legal rights
- Since elders' previous marriage
- Since elders' previous relationship with a partner or significant other

- Since elder's child(ren) were young
- Since elder's step-child(ren) joined the family
- Since elder's physical health issues declined
- Since elder's memory loss began  Since mental health concerns began
- Since business issues began  Since financial issues began
- Other: \_\_\_\_\_

How or with whom have you tried to resolve conflict in the past (check all that apply)

- Court  Elder Mediation  Attorney  Family member  Friend
- Doctor  Nurse  Nonrelated caregiver  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health professional
- Geriatric Care Manager  Clergy  Police
- Other: \_\_\_\_\_

**What major issues do you want to resolve through the eldercaring coordination process? (check all that apply)**  I don't know

- Family conflict in general  Elder's exposure to conflict  Elder's safety
- Elder's place of residence  Who is able to spend time with elder
- Elder's finances  Who makes decisions for elder  Elder's material possessions
- Who provides care for elder  Elder's doctor or treatment
- Coping with elder's memory loss  Coping with elder's decline in physical health
- Coping with elder's mental health  Other: \_\_\_\_\_

## SAFETY CONCERNS

**Are there any concerns about the safety of the elder or any others participating in the eldercaring process?**  Yes  No  I don't know

**What safety concerns were present in the past? (Check all that apply)**

- I don't know
- Elder abuse  Elder neglect  Domestic Violence
- Violence between other members of your family
- Coercion  Deception  Exploitation  Extortion/blackmail  Fraud
- Kidnapping  Robbery  Stalking  Substance abuse
- Other: \_\_\_\_\_

#1 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified? (check all that apply):

- Court  Police  Doctor
- Adult Protective Services or Child Protective Services
- Other: \_\_\_\_\_

#2 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified? (check all that apply):

- Court  Police  Doctor
- Adult Protective Services or Child Protective Services

Other: \_\_\_\_\_

#3 Perpetrated by whom? \_\_\_\_\_  
Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified? (check all that apply):

Court  Police  Doctor

Adult Protective Services or Child Protective Services

Other: \_\_\_\_\_

#4 Perpetrated by whom? \_\_\_\_\_  
Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified? (check all that apply):

Court  Police  Doctor

Adult Protective Services or Child Protective Services

Other: \_\_\_\_\_

## FEES/AFFORDABILITY

**OPTIONAL: Your yearly income, including investments (choose closest):**

Up to \$50,000  \$50,000 to \$75,000  \$75,000 to \$100,000

\$100,000 to \$150,000  \$150,000 to \$200,000  Over \$200,000

I don't want to say

**Do you have (check all that apply)**

Social Security  Other public benefits (such as SSI, SSDI, food stamps or housing subsidy)

Fixed income  Own house  Pension/IRA/Profit-sharing plans/other retirement plans

Life insurance  Additional assets

**Do you have (check all that apply)**

Medicaid  Medicare  Private Health Insurance  Veteran's Health Benefits

Long Term Care Insurance

**What are the Eldercaring Coordinator's fees?**

Less than \$50 per hour  Up to \$75 per hour  Up to \$100 per hour

Up to \$125 per hour  Up to \$150 per hour  Up to \$175 per hour

Up to \$200 per hour  Up to \$250 per hour  Up to \$300 per hour

More than \$300 per hour  I don't know

**Did the Eldercaring Coordinator charge a retainer?**  Yes  No

**Fees are (check all that apply):**

Paid fully by one party  Shared equally  Split according to ability to pay

No fee being charged  Designated by court order  Decided voluntarily

I don't know  Other: \_\_\_\_\_

**Who is paying for the eldercaring coordination process? (Check all that apply)**

Elder  Elder's sibling(s)  Elder's step-siblings

Elder's child(ren)  Elder's step-child(ren)

Elder's current spouse/legally recognized partner

Elder's partner/significant other without legal recognition

- Elder's extended family member  Elder's friend
- Other: \_\_\_\_\_
- I don't know

**Are you contributing to the Eldercaring Coordinator's fees?**  Yes  No  
 What is your relationship to elder? \_\_\_\_\_

**INITIAL ELDERCARING COORDINATION EXPERIENCE**

**Did you feel pressured to participate in eldercaring coordination?**  Yes  No  
**Did you enter into the process by your own free will?**  Yes  No

**List possible parties you think may be helpful to invite to the eldercaring coordination process (check all that apply):**

- Elder's sibling(s)  Elder's step-sibling(s)
- Elder's current spouse/legally recognized partner
- Elder's partner/significant other without legal recognition
- Elder's previous spouse(s), partner(s), or significant other(s)
- Elder's child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of Elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of Elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_
- I don't know

**List any parties you think may impede the eldercaring coordination process (check all that apply):**

- Elder's sibling(s)  Elder's step-sibling(s)
- Elder's current spouse/legally recognized partner
- Elder's partner/significant other without legal recognition
- Elder's previous spouse(s), partner(s), or significant other(s)
- Elder's child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of Elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of Elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_
- I don't know

**Do you think that everyone who has been involved in your dispute is participating in your eldercaring coordination process thus far?**  Yes  No  
 Who is left out? \_\_\_\_\_

**Are you given enough time to voice your concerns?**  Yes  No

**Do you feel safe as you think about beginning this process?**  Yes  No

If not, why not and what could help you feel safer during the eldercaring coordination process? \_\_\_\_\_

### **Expectations of the Eldercaring Coordination Process**

**Are you hopeful that eldercaring coordination will improve the elder's situation?**

Yes  No  I don't know

**How likely do you think it is you that your hopes will be realized?**

Won't help at all  Not likely to help  Things will probably stay the same  Might help  
 Very likely to help

Depending on your answer, why do you think eldercaring coordination will help or why do you think it won't help? \_\_\_\_\_

**How likely do you think it is that relationships between the people participating in eldercaring coordination are going to get better?**

Won't help at all  Not likely to help  Things will probably stay the same  Might help  
 Very likely to help

**What words best describe how you feel as you prepare to begin the eldercaring coordination process? (check all that apply)**

Hopeful  Safe  Confused  Worried  Scared  
 Empowered

Other: \_\_\_\_\_

What logistical factors or suggestions you have that may positively influence or enhance the eldercaring coordination process?

\_\_\_\_\_

\_\_\_\_\_



**PRE-SURVEY: QUESTIONS FOR THE ELDERCARING COORDINATOR**

This interview would be given to the Eldercaring Coordinator within one week after the process has begun, to ensure their initial participation. *The questions posted are for data collection purposes only and not endorsing any practices or activities that are referenced.*

**DEMOGRAPHICS**

**What is your age?**

- Under 30
- 30-39 years
- 40-49 years
- 50-59 years
- 60-69 years
- 70-80 years
- 80 years plus

**What is your gender?**

- Male
- Female
- Transgender
- Other (please specify): \_\_\_\_\_

**What is your race and ethnicity? Check as many that apply.**

- American Indian, Alaska Native, Aboriginal or First Nations
- Asian
- Black, African American or Afro Canadian
- Hispanic or Latino(a)
- Native Hawaiian or other Pacific Islander
- White (non-Hispanic or Latino/a)
- Other (please specify): \_\_\_\_\_

**Occupation(s) other than Eldercaring Coordinator (check all that apply):**

- Attorney  Mediator  Parenting Coordinator
- Doctor  Nurse  Social Worker
- Marriage and Family Therapist  Psychologist
- Other mental health provider  Geriatric Care Manager
- Professional Guardian  Patient Advocate
- Other \_\_\_\_\_

**Training completed in (check all that apply):**  Elder mediation  Family mediation

- Civil mediation  Parenting coordination  Eldercaring coordination

Have you attended a train-the-trainer program for any of the above?

- Yes  No

Have you been the lead trainer for any of the above  Yes  No

**How long have you been qualified as an Eldercaring Coordinator?**

- Six months or less  Six months to one year  One to two years
- Two to five years  More than five years

**How many times have you served as Eldercaring Coordinator, including this case?**

- This is my first case    Two to three cases    Four to five cases  
 More than five cases  
 Were these cases  court ordered    voluntary  
 some cases were court ordered and some were voluntary

What is the longest length of time you served as an Eldercaring Coordinator in a case?

- Up to three months    Between three months and six months  
 Between six months and nine months  
 Between nine months and one year  
 Between one year and eighteen months  
 Between eighteen months and two years  
 More than two years

**Have you had any cases referred to you that were not initiated due to (check all that apply):**

- Cost    Parties chose another Eldercaring Coordinator    Location    Language  
 Parties decided not to initiate the process  
 Other: \_\_\_\_\_

## RELATIONSHIP TO THE ELDER

**Do you have an existing relationship with the elder?**  Yes    No

If yes, what is your relationship:

- Elder's sibling(s)    Elder's step-sibling(s)  
 Elder's current spouse/legally recognized partner  
 Elder's partner/significant other without legal recognition  
 Elder's previous spouse(s), partner(s), or significant other(s)  
 Elder's child(ren)    Your step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of Elder's child(ren)  
 Spouse(s), partner(s) or significant other(s) of Elder's step-child(ren)  
 Extended family    Friend(s)    Non-related caregiver(s)  
 Patient Advocate    Medical Surrogate    Power of Attorney  
 Doctor    Nurse    Geriatric Care Manager    Social Worker  
 Psychologist    Marriage and Family Therapist    Other mental health provider  
 Attorney    Guardian    Mediator    Accountant    Financial Advisor    Clergy  
 Business partner(s)    Funeral Director    Realtor    Pet(s)  
 Other: \_\_\_\_\_

**Did you ever have specific decision-making authority for the elder?**

- Yes    No If yes, for what? \_\_\_\_\_  
 Who gave you decision-making authority?  The Court    The elder

**How long have you known the elder?**

- Your whole life    Since childhood    Since adolescence  
 Up to 50 years    Up to 40 years    Up to 30 years  
 Up to 20 years    Up to 10 years    Up to 5 years  
 Up to 3 years    One year or less  
 Just met in capacity as Eldercaring Coordinator

**How often have you been in contact with the elder this past year (in person, by phone, by email)?**

- Not until the eldercaring coordination process began
- Reside with elder  More than once a week  Once a week
- Twice a month  Once a month  Once every other month
- Once in three months  Once in six months  One time in the past year
- Less than once a year

**Are you a caregiver for the elder?**  Yes  No

If yes, on a regular basis what caregiving task(s) do you provide? Check all that apply:

- Transportation  Clean home  Pay bills
- Go to movies/entertainment
- Share activities in elder's home (cards, games, watch TV)
- Prepare meals  Feed  Bathe or provide other personal care
- Provide medical care  Coordinate health care or social services
- Other: \_\_\_\_\_

### **INITIATION OF ELDERCARING COORDINATION PROCESS**

**Was this eldercaring coordination process court-ordered?**  Yes  No

**Who referred the parties for eldercaring coordination?**

- Judge  Court Program  Attorney  Guardian  Mediator  Doctor
- Geriatric Care Manager  Patient Advocate  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health provider
- Friend  Family Member  Other, who (role or relationship)? \_\_\_\_\_

**Who told parties about you as an Eldercaring Coordinator? Choose all that apply.**

- Judge  Court Program  Attorney  Guardian  Mediator  Doctor
- Geriatric Care Manager  Patient Advocate  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health provider
- Friend  Family Member  Other, who (role or relationship)? \_\_\_\_\_

**Do you speak the primary language of the elder?**

- Yes  No

Of the other participants?  All  Some  None

If you do not speak the primary language of the elder or some of the participants, do you (check all that apply):  Use Interpreter  Have participants interpret

### **ELDERCARING COORDINATION PROCESS**

**Is this eldercaring coordination process:**  court ordered  voluntary

**How did the parties first hear about eldercaring coordination?**

- Judge  Court Program  Attorney  Guardian  Mediator  Doctor
- Geriatric Care Manager  Patient Advocate  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health provider
- Friend  Family Member  Other, who (role or relationship)? \_\_\_\_\_

**How did you explain the process of eldercaring coordination to the parties? Check all that apply:**

In writing  In person  Separately  Jointly  
Never explained the process at all

**Do you think the elder understands the process now that you are about to begin eldercaring coordination?**  Yes  No

**Do you think the other parties understand the process now that you are about to begin eldercaring coordination?**  Yes  No

**Did you use a screening to check for safety concerns pertaining to the elder?**  
 Yes  No  Individually  Jointly

**Did you use a screening to check for safety concerns pertaining to the other participants in the process?**  Yes  No If yes,  Individually  Jointly

**Are there participants, court-ordered or invited, whom you did not screen for safety concerns?**

Yes  No

If yes, why did you choose not to screen? \_\_\_\_\_

**Did you use a screening to check the elder's capacity to participate in the eldercaring coordination process ?**

Yes  No If yes,  Individually  Jointly

**Did you use a screening to check other participants' capacity to participate in the eldercaring coordination process ?**  Yes  No If yes,  Individually  Jointly

**Are there participants, court-ordered or invited, that you did not screen for capacity to participate in the eldercaring coordination process?**

Yes  No

If yes, why? \_\_\_\_\_

**Who was court ordered to participate in the eldercaring coordination process you are facilitating? (Check all that apply):**

- Not applicable because process was voluntary
- Elder's sibling(s)  Elder's step-sibling(s)
- Elder's current spouse/legally recognized partner
- Elder's partner/significant other without legal recognition
- Elder's previous spouse(s), partner(s), or significant other(s)
- Elder's child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of Elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of Elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Funeral Director  Realtor
- Other: \_\_\_\_\_
- I don't know

**Who is being invited to participate in the eldercaring coordination process so far?  
(Check all that apply):**

- Elder's sibling(s)     Elder's step-sibling(s)
- Elder's current spouse/legally recognized partner
- Elder's partner/significant other without legal recognition
- Elder's previous spouse(s), partner(s), or significant other(s)
- Elder's child(ren)     Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of Elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of Elder's step-child(ren)
- Extended family     Friend(s)     Non-related caregiver(s)
- Patient Advocate     Medical Surrogate     Power of Attorney
- Doctor     Nurse     Geriatric Care Manager     Social Worker
- Psychologist     Marriage and Family Therapist     Other mental health provider
- Attorney     Guardian     Mediator     Accountant     Financial Advisor     Clergy
- Business partner(s)     Funeral Director     Realtor     Pet(s)
- Other: \_\_\_\_\_
- I don't know

**OVERVIEW OF THE REFERRING ISSUES**

**There is conflict between: (check all that apply)**

- Elder     Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)     Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family     Friend(s)     Non-related caregiver(s)
- Patient Advocate     Medical Surrogate     Power of Attorney
- Doctor     Nurse     Geriatric Care Manager     Social Worker
- Psychologist     Marriage and Family Therapist     Other mental health provider
- Attorney     Guardian     Mediator     Accountant     Financial Advisor     Clergy
- Business partner(s)     Realtor     Funeral Director
- Other: \_\_\_\_\_
- I don't know

How long has each conflict been going on?

#1 Conflict between \_\_\_\_\_

Recent     Up to two years     Two to five years     More than five years

When did the conflict begin? (check all that apply)

- Since elder's siblings began arguing
- Since elder's current marriage/partner with legal rights
- Since elders' previous marriage
- Since elders' previous relationship with a partner or significant other
- Since elder's child(ren) were young
- Since elder's step-child(ren) joined the family
- Since elder's physical health issues declined
- Since elder's memory loss began     Since mental health concerns began
- Since business issues began     Since financial issues began

Other: \_\_\_\_\_

#2 Conflict between \_\_\_\_\_

Recent  Up to two years  Two to Five years  More than five years

When did the conflict begin? (check all that apply)

- Since elder's siblings began arguing
- Since elder's current marriage/partner with legal rights
- Since elders' previous marriage
- Since elders' previous relationship with a partner or significant other
- Since elder's child(ren) were young
- Since elder's step-child(ren) joined the family
- Since elder's physical health issues declined
- Since elder's memory loss began  Since mental health concerns began
- Since business issues began  Since financial issues began
- Other: \_\_\_\_\_

#3 Conflict between \_\_\_\_\_

Recent  Up to two years  Two to five years  More than five years

When did the conflict begin? (check all that apply)

- Since elder's siblings began arguing
- Since elder's current marriage/partner with legal rights
- Since elders' previous marriage
- Since elders' previous relationship with a partner or significant other
- Since elder's child(ren) were young
- Since elder's step-child(ren) joined the family
- Since elder's physical health issues declined
- Since elder's memory loss began  Since mental health concerns began
- Since business issues began  Since financial issues began
- Other: \_\_\_\_\_

**What major issues do the elder and other participants want to resolve through the eldercaring coordination process? (check all that apply)**  I don't know yet

- Family conflict in general  Elder's exposure to conflict  Elder's safety
- Elder's place of residence  Who is able to spend time with elder
- Elder's finances  Who makes decisions for elder  Elder's material possessions
- Who provides care for elder  Elder's doctor or treatment
- Coping with elder's memory loss  Coping with elder's decline in physical health
- Coping with elder's mental health  Other: \_\_\_\_\_

Are there issues in addition that you think also need to be resolved?  yes  no

If yes, what issue(s) do you think you will try to help them resolve in the eldercaring coordination process? \_\_\_\_\_

## SAFETY CONCERNS

**Are there any concerns about the safety of the elder or any others participating in the eldercaring coordination process?**  Yes  No  I don't know yet

**What safety concerns were present in the past? (Check all that apply)**

- I don't know

- Elder abuse  Elder neglect  Domestic Violence
- Violence between other members of the elder's family
- Coercion  Deception  Exploitation  Extortion/blackmail  Fraud
- Kidnapping  Robbery  Stalking  Substance abuse
- Other: \_\_\_\_\_

#1 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified (check all that apply):  Police

Doctor  Adult Protective Services or Child Protective Services

Court  Other: \_\_\_\_\_

#2 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified (check all that apply):  Police

Doctor  Adult Protective Services or Child Protective Services

Court  Other: \_\_\_\_\_

#3 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified (check all that apply):  Police

Doctor  Adult Protective Services or Child Protective Services

Court  Other: \_\_\_\_\_

#4 Perpetrated by whom? \_\_\_\_\_

Against whom? \_\_\_\_\_

Were authorities contacted?  Yes  No

If yes, which of the following were notified (check all that apply):  Police

Doctor  Adult Protective Services or Child Protective Services

Court  Other: \_\_\_\_\_

## FEES/AFFORDABILITY

**OPTIONAL: Eldercaring Coordinator's yearly income, including investments (choose closest):**

Up to \$50,000  \$50,000 to \$75,000  \$75,000 to \$100,000

\$100,000 to \$150,000  \$150,000 to \$200,000  Over \$200,000  Do not wish to disclose

**What are your fees as an Eldercaring Coordinator?**

Less than \$50 per hour  Up to \$75 per hour  Up to \$100 per hour

Up to \$125 per hour  Up to \$150 per hour  Up to \$175 per hour

Up to \$200 per hour  Up to \$250 per hour  Up to \$300 per hour

More than \$300 per hour

**Do you check participants' ability to pay?**  Yes  No

**Do you charge a retainer as an Eldercaring Coordinator**  Yes  No

If yes, what is your retainer fee? \_\_\_\_\_

**Fees are (check all that apply):**

- Paid fully by one party  Shared equally  Split according to ability to pay  
 No fee being charged  Designated by court order  Decided voluntarily  
 I don't know  Other: \_\_\_\_\_

**Are you working pro bono for this case?**  Yes  No

**Are you charging on a sliding scale fee basis for this case?**  Yes  No

**Who is paying for the eldercaring coordination process? (Check all that apply)**

- Elder  Elder's sibling(s)  Elder's step-sibling(s)  
 Elder's current spouse/partner with legal rights  
 Elder's partner/significant other without legal rights  
 Elder's child(ren)  Elder's step-child(ren)  
 Extended family member  Friend  
 Other: \_\_\_\_\_  
 I am working pro bono

**INITIAL ELDERCARE COORDINATION EXPERIENCE**

**List possible parties you think may be helpful to invite to the eldercaring coordination process (check all that apply):**  I don't know yet

- Your sibling(s)  Your step-sibling(s)  
 Your current spouse/legally recognized partner  
 Your partner/significant other without legal recognition  
 Your previous spouse(s), partner(s), or significant other(s)  
 Your child(ren)  Your step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of your child(ren)  
 Spouse(s), partner(s) or significant other(s) of your step-child(ren)  
 Extended family  Friend(s)  Non-related caregiver(s)  
 Patient Advocate  Medical Surrogate  Power of Attorney  
 Doctor  Nurse  Geriatric Care Manager  Social Worker  
 Psychologist  Marriage and Family Therapist  Other mental health provider  
 Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy  
 Business partner(s)  Realtor  Funeral Director  Pet(s)  
 Other: \_\_\_\_\_  
 I don't know

**List any parties you think may impede the eldercaring coordination process (check all that apply):**  I don't know yet

- Your sibling(s)  Your step-sibling(s)  
 Your current spouse/legally recognized partner  
 Your partner/significant other without legal recognition  
 Your previous spouse(s), partner(s), or significant other(s)  
 Your child(ren)  Your step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of your child(ren)  
 Spouse(s), partner(s) or significant other(s) of your step-child(ren)  
 Extended family  Friend(s)  Non-related caregiver(s)  
 Patient Advocate  Medical Surrogate  Power of Attorney  
 Doctor  Nurse  Geriatric Care Manager  Social Worker  
 Psychologist  Marriage and Family Therapist  Other mental health provider



- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy  
 Business partner(s)  Realtor  Funeral Director  Pet(s)  
 Other: \_\_\_\_\_  
 I don't know
- 

**Do you think that everyone who has been involved in disputes is participating in this eldercaring coordination process thus far?**  Yes  No  I don't know yet

Who may be left out? \_\_\_\_\_

**Do you feel safe as you think about beginning this process?**  Yes  No

**If not, what could help you feel safer during the eldercaring coordination process?**

---

### **EXPECTATIONS OF THE ELDERCARING COORDINATION PROCESS**

**Are you hopeful that eldercaring coordination will improve the elder's situation?**

Yes  No  I don't know

**How likely do you think it is that these hopes will be realized?**

Won't help at all  Not likely to help  Things will probably stay the same  Might help  
 Very likely to help

Depending on your answer, why do you think it will help or why do you think it won't help? \_\_\_\_\_

**How likely do you think it is that relationships between the people participating in the eldercaring coordination process are going to get better?**

Won't help at all  Not likely to help  Things will probably stay the same  Might help  
 Very likely to help

**Are there logistical factors or suggestions you have that might positively influence or enhance the eldercaring coordination process?**

---

## POST-SURVEY QUESTIONS FOR ELDER

This interview would be given to the Elder within four weeks after the process is completed. *The questions posted are for data collection purposes only and not endorsing any practices or activities that are referenced.*

Your participation in the eldercaring coordination process was:

- court-ordered  voluntary

How long was your eldercaring coordination process?

- Less than one month  One to three months  Four to six months  
 Seven to nine months  Ten months to twelve months  13 months to 18 months  
 19 months to 24 months  More than 24 months

Why did the eldercaring coordination end?

- Conflicts were successfully resolved before the Eldercaring Coordinator's term was complete  
 Completion of the term allotted for the Eldercaring Coordinator  
 Eldercaring Coordinator asked to end his or her involvement in your case  
 Participants asked the judge to end the process  
 Participants asked the judge to replace the Eldercaring Coordinator

Did you continue to work in the eldercaring coordination process after the initial time allotted for the term of the Eldercaring Coordinator was completed?  Yes  No

If yes,  by court order or  voluntarily

Has there been any change in circumstances for you since the eldercaring coordination process started?

Was there a change in your residence?  Yes  No

If yes, now reside:

- By yourself  With your spouse/partner with legal rights  
 With your partner or your significant other without legal rights  
 With your sibling  With your child  With your friend  
 Other: \_\_\_\_\_

You now reside in:  Same house  Different house  Different apartment/Condo  
 Independent living facility  Assisted Living Facility or group home  
 Nursing home  Treatment facility

How do you spend most of your time?  Alone  With family member day time  At work

- With family member overnight  With other caregiver day time  
 With other caregiver overnights  At senior center or adult day program  
 In nursing home  In treatment facility

Do you receive assistance with (check all that apply):  Transportation

- Transportation  Preparing meals  Cleaning home  Maintaining house  
 Paying bills  Going to movies/entertainment  Eating  
 Bathing or other personal care  In-home medical care  
 Coordination of health care or social services  
 Other: \_\_\_\_\_

Since the eldercaring coordination process began, did your health:

- Improve  Worsen  Stay the same

**Has your need for care changed since the eldercaring process started?**  I need less care  
 The amount of care I need has not changed  I need more assistance

**Is your care:**  Provided by the same person(s) as before the eldercaring coordination process  
 Provided by different person(s) than when the eldercaring coordination process started  
 The responsibilities are shared more now

**Do you attribute any change of circumstances to the eldercaring coordination process?**

**Check all that apply:**  Change in residence  Change in care  
 Change in how you spend your days

**Are you satisfied with the care you receive now?**  Yes  No  Not sure

### **OUTCOME OF ELDERCARING COORDINATION PROCESS**

**Since the eldercaring coordination process started, conflict has:**

Increased  Decreased  Stayed the same

**The eldercaring coordination process helped resolve conflict between you and who else? (check all that apply)**

- Your sibling(s)  Your step-sibling(s)
- Your current spouse/legally recognized partner
- Your partner/significant other without legal recognition
- Your previous spouse(s), partner(s), or significant other(s)
- Your child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_
- It did not help resolve conflict

**The eldercaring coordination process helped resolve conflict between what other participants in the eldercaring coordination process? (check all that apply)**

- Your sibling(s)  Your step-sibling(s)
- Your current spouse/legally recognized partner
- Your partner/significant other without legal recognition
- Your previous spouse(s), partner(s), or significant other(s)
- Your child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy

- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_
- It did not help resolve conflict

**Now that the eldercaring coordination process has finished, conflict continues between you and who else? (check all that apply)**

- Your sibling(s)  Your step-sibling(s)
- Your current spouse/legally recognized partner
- Your partner/significant other without legal recognition
- Your previous spouse(s), partner(s), or significant other(s)
- Your child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_

**Now that the eldercaring coordination process has finished, conflict continues between what other participants in the eldercaring coordination process? (check all that apply)**

- Your sibling(s)  Your step-sibling(s)
- Your current spouse/legally recognized partner
- Your partner/significant other without legal recognition
- Your previous spouse(s), partner(s), or significant other(s)
- Your child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_

**Issues that were resolved through eldercaring coordination include :**

- Family conflict in general  Your safety  Your exposure to conflict
- Your place of residence  Who is able to spend time with you  Your finances
- Who makes decisions for you  Who provides care for you
- Your doctor or treatment  Coping with your decline in physical health
- Coping with your memory loss  Coping with your mental health concerns
- Your material possessions  Other: \_\_\_\_\_

**Issues that were not resolved through eldercaring coordination:**

- Family conflict in general  Your safety  Your exposure to conflict
- Your place of residence  Who is able to spend time with you  Your finances
- Who makes decisions for you  Who provides care for you
- Your doctor or treatment  Coping with your decline in physical health

- Coping with your memory loss
  Coping with your mental health concerns  
 Your material possessions
  Other: \_\_\_\_\_

**In order to resolve conflict, the Eldercaring Coordinator took what actions (check all that apply):**

- Helped to create an eldercare plan
  Helped to modify an eldercare plan  
 Helped to implement an eldercare plan
  There was no plan

**The Eldercaring Coordinator referred you to the following resources (check all that apply):**

- Non-related caregivers
  Attorneys
  Guardian
  Clergy  
 Doctor
  Financial Advisor
  Patient Advocate
  Social Worker  
 Psychologist
  Marriage & family therapist
  Other mental health provider  
 Geriatric Care Manager
  Funeral Director  
 Accountant
  Business partner
  Nurse
  Mediator  
 Guardian
  Power of Attorney
  Medical Surrogate  
 Other: \_\_\_\_\_

**The Eldercaring Coordinator referred participants to the following resources:**

- Non-related caregivers
  Attorneys
  Guardian
  Clergy  
 Doctor
  Financial Advisor
  Patient Advocate
  Social Worker  
 Psychologist
  Marriage & family therapist
  Other mental health provider  
 Geriatric Care Manager
  Funeral Director  
 Accountant
  Business partner
  Nurse
  Mediator  
 Guardian
  Power of Attorney
  Medical Surrogate  
 Other: \_\_\_\_\_

**The Eldercaring Coordinator helped you make decisions regarding the following issues:**

- Who will make certain decisions about your care or safety  
 Procedure to follow when making decisions about your care or safety  
 What resources to use to help make decisions about your care or safety  
 Other: \_\_\_\_\_

**The Eldercaring Coordinator actually made decisions regarding the following issues:**

- Who will make certain decisions about your care or safety  
 Procedure to follow when making decisions about your care or safety  
 What resources to use to help make decisions about your care or safety  
 Other: \_\_\_\_\_

**Now that you completed the process, do you think it was successful?**

- Yes
  No
  I don't know

Are relationships between you and the other participants:

- Better
  The same
  Worse

Are relationships among the participants:

- Better
  The same
  Worse
  I don't know

Has communication improved and are you and other participants better able to talk with each other and respect each other's opinions?
  Yes
  No
  I don't know

Are you worried that things might go back to the way they were before the eldercaring coordination process began?  Yes  No

Do you have a support group of family members you can call for assistance?  Yes  
 No

Do you have a support group of professionals you can call for assistance?  Yes  No

Are you more aware of community resources that might be helpful in the future?  
 Yes  No

Do you think that the eldercaring coordination process will help you and participants resolve issues together without going to court?  Yes  No

If you can't resolve issues in the future, are you more likely to use the resources given to you by the Eldercaring Coordinator to assist you?  Yes  No  I don't know

Do you feel safer now that the eldercaring coordination process is over?  
 More safe  Less safe  The same as before

How did you feel during the eldercaring coordination process? (Check all that apply)

- Didn't like it  Not sure  Hopeful  Worried  Satisfied  
 Empowered  Pressured to participate  Confused  Scared  
 Other: \_\_\_\_\_

What activities or services did you find most helpful? (check all that apply)

- Meetings  
 Calling the Eldercaring Coordinator for support  
 Learning how to communicate better  
 Formulated a plan to resolve issues  
 Bringing in professionals during meetings to assist  
 Referrals to community providers  
 Other: \_\_\_\_\_

How are you handling things on your own or with your family members since participating in the eldercaring coordination process ended?

- Much better  Somewhat better  The same  Not as well  Much worse

Would it be helpful to have a follow-up meeting in a few months with your Eldercaring Coordinator to evaluate the resolution and discuss any issues?

- Yes  No  I don't know

Overall, are you satisfied with the eldercaring coordination process?  Yes  No

Do you believe that there were fewer or no issues to take to court because of this process?  Yes  No  I don't know

Would you recommend the eldercaring coordination process to others?  Very much

- Somewhat  I don't know  Not so much  Never

Is there anything else that you wish your Eldercaring Coordinator had known or done that could have improved the process?

Yes  No  
If yes, what: \_\_\_\_\_

**Are there any changes or additions you would make to improve this process for improvement?**

\_\_\_\_\_

### **SAFETY CONCERNS DURING THE ELDERCARING COORDINATION PROCESS**

**Were there any safety concerns during the eldercaring coordination process?**

Yes  No

If yes, what safety concerns were revealed during the eldercaring coordination process?  
(Check all that apply)

- Elder abuse  Elder neglect  Domestic Violence  Family Violence  
 Coercion  Deception  Exploitation/taking advantage of you  Fraud  
 Extortion/blackmail  Kidnapping  Robbery  Stalking  Substance abuse

#1 Perpetrated by whom? \_\_\_\_\_  
Against whom? \_\_\_\_\_

#2 Perpetrated by whom? \_\_\_\_\_  
Against whom? \_\_\_\_\_

#3 Perpetrated by whom? \_\_\_\_\_  
Against whom? \_\_\_\_\_

**Were authorities contacted during the process?**  Yes  No

If yes, the following were notified:  Police  Doctor  Court

Adult Protective Services or Child Protective Services

Other: \_\_\_\_\_

**Did the Eldercaring Coordinator ask you questions to screen for elder abuse, neglect, and exploitation?**

- Once, at the beginning of the process  Several times throughout the process  
 Never  I don't know

**Were you by yourself or with others when asked?**  By myself

With others  By myself some of the time and with others some of the time

**Did you feel comfortable answering openly and honestly?**  Yes  No

**Do you have any concerns regarding your safety now that the eldercaring coordination process is over?**  Yes  No

**Do you have concerns about the safety of any of the participants?**  Yes  No

### **OVERVIEW OF THE ELDERCARING COORDINATION PROCESS**

**What issues were addressed during the eldercaring coordination process (check all that apply):**

- Family conflict in general  Your exposure to conflict  Your safety

- Your place of residence
- Who is able to spend time with you
- Your finances
- Who makes decisions for you
- Your material possessions
- Who provides care for you
- Your doctor or treatment
- Coping with your memory loss
- Coping with your decline in physical health
- Coping with your mental health
- Other: \_\_\_\_\_

**What factors contributed to the conflict? (Check all that apply)**

- Problems with your sibling(s)
- Problems with your step-sibling(s)
- Problems with your current spouse/partner with legal rights
- Problems with your significant other/partner with no legal rights
- Problems with your previous spouse, partner or significant other
- Your children don't get along
- Your step-child(ren) don't get along
- Your child(ren) and step-child(ren) don't get along
- Your child(ren) and/or step-child(ren) don't get along with your spouse/partner/significant other
- Your decline in physical health
- Your memory loss
- Your mental health concerns
- Concerns regarding your ability to make decisions for yourself
- Financial/business issues
- Other: \_\_\_\_\_

**How or through whom have you tried to resolve conflict since the eldercaring coordination process began? (Check all that apply)**

- Court
- Elder Mediation
- Attorney
- Family member
- Friend
- Doctor
- Nurse
- Nonrelated caregiver
- Social Worker
- Psychologist
- Marriage and Family Therapist
- Other mental health professional
- Geriatric Care Manager
- Clergy
- Police
- Other: \_\_\_\_\_

**Issues were brought to court for clarification or further direction by whom? (Check all that apply)**

- No issues were brought to court
- You or your attorney brought issues to the court
- Your Guardian
- The Eldercaring Coordinator
- Other: \_\_\_\_\_

**Were agreements made during the eldercaring coordination process?  Yes  No**

If yes, the agreements made were related to (check all that apply):

- Your care
- Who could spend time with you
- Your medical treatment
- Your home
- Your possessions
- Your personal relationships
- Your place of residence
- Community resources
- Other: \_\_\_\_\_

**Did the court order include the types of decisions the Eldercaring Coordinator could make?**

- Yes
- No
- If yes, what types of decisions were included? (Check all that apply)
- Your care
- Who could spend time with you
- Your medical treatment
- Your home
- Your possessions
- Your personal relationships
- Your place of residence
- Community resources
- Other: \_\_\_\_\_



**Did you ever give the Eldercaring Coordinator additional decision-making authority?**

Yes  No

If yes, regarding what?  Your care  Who could spend time with you

Your medical treatment  Your home  Your possessions

Your personal relationships  Your place of residence  Community resources

Other: \_\_\_\_\_

## ELDERCARING COORDINATION PARTICIPANTS

**Do you feel comfortable about your participation in the eldercaring coordination process?**  Yes  No

If not, why not? \_\_\_\_\_

**Did you attend:**  Most of the meetings scheduled  Some of the meetings scheduled  Few of the meetings scheduled  Couldn't attend any of the meetings

**Describe your level of participation:**  Active and verbal in the meetings you  Active and verbal in some meetings  Physically present but not very verbal in all meetings  Physically present but not very verbal in some meetings  Not physically present in most or any of the meetings  Couldn't make it to the meetings so attended by telephone or video conference

**The following were court-ordered to participate in the eldercaring coordination process:**

Your sibling(s)  Your step-sibling(s)

Your current spouse/legally recognized partner

Your partner/significant other without legal recognition

Your previous spouse(s), partner(s), or significant other(s)

Your child(ren)  Your step-child(ren)

Spouse(s), partner(s) or significant other(s) of your child(ren)

Spouse(s), partner(s) or significant other(s) of your step-child(ren)

Extended family  Friend(s)  Non-related caregiver(s)

Patient Advocate  Medical Surrogate  Power of Attorney

Doctor  Nurse  Geriatric Care Manager  Social Worker

Psychologist  Marriage and Family Therapist  Other mental health provider

Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy

Business partner(s)  Realtor  Funeral Director

Other: \_\_\_\_\_

I don't know

**List those who were invited to participate in the eldercaring coordination process (check all that apply):**

Your sibling(s)  Your step-sibling(s)

Your current spouse/legally recognized partner

Your partner/significant other without legal recognition

Your previous spouse(s), partner(s), or significant other(s)

Your child(ren)  Your step-child(ren)

Spouse(s), partner(s) or significant other(s) of your child(ren)

Spouse(s), partner(s) or significant other(s) of your step-child(ren)

Extended family  Friend(s)  Non-related caregiver(s)

Patient Advocate  Medical Surrogate  Power of Attorney

Doctor  Nurse  Geriatric Care Manager  Social Worker

Psychologist  Marriage and Family Therapist  Other mental health provider

- Attorney    Guardian    Mediator    Accountant    Financial Advisor    Clergy  
 Business partner(s)    Realtor    Funeral Director    Pet(s)  
 Other: \_\_\_\_\_  
 I don't know

**List the participants that were helpful in the eldercaring coordination process (check all that apply):**

- Your sibling(s)    Your step-sibling(s)  
 Your current spouse/legally recognized partner  
 Your partner/significant other without legal recognition  
 Your previous spouse(s), partner(s), or significant other(s)  
 Your child(ren)    Your step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of your child(ren)  
 Spouse(s), partner(s) or significant other(s) of your step-child(ren)  
 Extended family    Friend(s)    Non-related caregiver(s)  
 Patient Advocate    Medical Surrogate    Power of Attorney  
 Doctor    Nurse    Geriatric Care Manager    Social Worker  
 Psychologist    Marriage and Family Therapist    Other mental health provider  
 Attorney    Guardian    Mediator    Accountant    Financial Advisor    Clergy  
 Business partner(s)    Realtor    Funeral Director    Pet(s)  
 Other: \_\_\_\_\_  
 I don't know

**List the parties you think impeded the eldercaring coordination process (check all that apply):**

- No one who participated impeded the process  
 Your sibling(s)    Your step-sibling(s)  
 Your current spouse/legally recognized partner  
 Your partner/significant other without legal recognition  
 Your previous spouse(s), partner(s), or significant other(s)  
 Your child(ren)    Your step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of your child(ren)  
 Spouse(s), partner(s) or significant other(s) of your step-child(ren)  
 Extended family    Friend(s)    Non-related caregiver(s)  
 Patient Advocate    Medical Surrogate    Power of Attorney  
 Doctor    Nurse    Geriatric Care Manager    Social Worker  
 Psychologist    Marriage and Family Therapist    Other mental health provider  
 Attorney    Guardian    Mediator    Accountant    Financial Advisor    Clergy  
 Business partner(s)    Realtor    Funeral Director    Pet(s)  
 Other: \_\_\_\_\_  
 I don't know

**List who, in hindsight, you think should have been invited to the process that wasn't (check all that apply):**

- No one, everyone important participated  
 Your sibling(s)    Your step-sibling(s)  
 Your current spouse/legally recognized partner  
 Your partner/significant other without legal recognition  
 Your previous spouse(s), partner(s), or significant other(s)  
 Your child(ren)    Your step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of your child(ren)  
 Spouse(s), partner(s) or significant other(s) of your step-child(ren)  
 Extended family    Friend(s)    Non-related caregiver(s)

- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_
- I don't know

**List those that were invited but refused to participate:**

- Your sibling(s)  Your step-sibling(s)
- Your current spouse/legally recognized partner
- Your partner/significant other without legal recognition
- Your previous spouse(s), partner(s), or significant other(s)
- Your child(ren)  Your step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_
- I don't know

**FEES/AFFORDABILITY**

**Who paid for the eldercaring coordination process? (Check all that apply)**

- No one as there were no fees charged  You  Your sibling(s)
- Your child(ren)  Your step-child(ren)  Your spouse/partner with legal rights
- Your significant other/partner with no legal rights
- Your previous spouse, partner or significant other  Extended family member  Friend
- Business partner  Other: \_\_\_\_\_
- I don't know

**Did the Eldercaring Coordinator adjust his or her fees according to your ability to afford the process?**  Yes  No  I don't know

**What were the Eldercaring Coordinator's fees?**

- Less than \$50 per hour  \$51 to \$75 per hour  \$75 to \$100 per hour
- \$101 to \$125 per hour  \$126 to \$150 per hour  \$151 to \$175 per hour
- \$176 to \$200 per hour  \$201 to \$250 per hour  \$250 to \$300 per hour
- More than \$300 per hour  I don't know

**Did the Eldercaring Coordinator charge a retainer?**  Yes  No

If yes, how much? \_\_\_\_\_  
 I don't know

**How were fees paid? (check all that apply):**

- Paid fully by one party  Shared equally  Split according to ability to pay
- No fee being charged  Designated by court order  Decided voluntarily

I don't know  Other: \_\_\_\_\_

**Did the judge prorate the fees for participants according to who could most easily afford to pay?**

Yes  No  I don't know

**Did the judge reconsider the fee allocation due to the behavior of a specific participant and have that person pay more?**  Yes  No  I don't know

**What was the total cost of the eldercaring coordination process from start to finish?**

\_\_\_\_\_  I don't know

**Were fees an area of contention:**

Between participants?  Yes  No  I don't know

Between the Eldercaring Coordinator and participants?  Yes  No  I don't know

**Was the number of meetings reduced to decrease the costs?**

Yes  No  I don't know

**How did the Eldercaring Coordinator try to resolve fee issues? (Check all that apply):**

Privately spoke with the party withholding payment

Spoke with the party jointly with the others in the process

Another party offered to share costs

Scheduled fewer meetings to reduce the costs

Informed the court

If the court was informed, did the judge order fees to be paid?  Yes  No

I don't know

## **ELDERCARING COORDINATOR**

**Did you like your Eldercaring Coordinator?**  Yes  No

If yes, why? Check all that apply:

He/She listened to me

He/She agreed with me at least some of the time

He/She tried to reduce the conflict

He/She explained the process so I could understand it

He/She was patient  He/She was knowledgeable about how to reduce conflict

He/She really seemed to understand me

He/She stuck up for me in front of the others in the meetings

He/She didn't judge me

He/She successfully influenced others to agree with my position

Other: \_\_\_\_\_

If no, why not? Check all that apply:  He/She didn't give me time to speak

He/She never agreed with me  He/She didn't make any difference

He/She didn't explain the process so I never understood it

He/She pressured me to speak when I didn't want to

He/She was not knowledgeable about how to reduce conflict

He/She pressured me to make decisions  He/She embarrassed me

He/She judged me  He/She tried but could not influence family members who remained committed to their position

Other: \_\_\_\_\_

**Approximately how old was your Eldercaring Coordinator:**

25-35 years  36-45 years  46-55 years  55-65 years  over 65 years

Do you wish your Eldercaring Coordinator had been:

Younger  Older  Doesn't matter

**What gender was your Eldercaring Coordinator**  Male  Female

Would you prefer someone of a different gender  Yes  No  Doesn't matter

**Do you think the Eldercaring Coordinator was fair?**  Yes  No

If no, did you think the Eldercaring Coordinator was taking sides?  Yes  No

Whose side? \_\_\_\_\_

**Do you trust that the Eldercaring Coordinator had your best interests at heart?**

Yes  No

**During the eldercaring coordination process, the Eldercaring Coordinator (check all that apply):**

- Facilitated more effective communication, negotiation, and problem-solving skills;
- Provided education about elder care resources;
- Facilitated the creation of an elder care plan
- Modified an existing elder care plan
- Assisted in the implementation of an elder care plan
- Made recommendations for resolutions
- Made decisions as directed in the court order
- Made decisions when participants asked him or her to
- Made decisions that were not included in the court order and were without participants' approval

**Were there any complaints made against the Eldercaring Coordinator?**  Yes  No

If Yes, was a complaint made by:  You  Other participant

Was the complaint made in writing and given to the Eldercaring Coordinator?

Yes  No

Was the complaint discussed with the Eldercaring Coordinator?  Yes  No

If yes, was the complaint resolved?  Yes  No

Was the complaint taken to the judge?  Yes  No

Did the Eldercaring Coordinator testify?  Yes  No

If yes, was the Eldercaring Coordinator taken off your case?  Yes  No

If yes, was that because:

- The Eldercaring Coordinator asked the court to be discharged as this case was not amenable to the eldercaring coordination process
- The court wanted to avoid a conflict of interest since the Eldercaring Coordinator just testified
- You or other participants asked that the Eldercaring Coordinator be discharged from the case
- The court found fault in the performance of the Eldercaring Coordinator

Was another Eldercaring Coordinator appointed?  Yes  No

The complaint was: \_\_\_\_\_

**ELDERCARING COORDINATION EXPERIENCE**

**Where did the eldercaring coordination meetings take place? (check all that apply):**

- Eldercaring Coordinator's Office  Attorney's Office  Your residence  
 Family Member's Home  Religious setting  Other \_\_\_\_\_

**Was the location(s) comfortable?  Yes  No**

Was the location(s) convenient/Close by?  Yes  No

Was there adequate parking or other transportation?  Yes  No

**Was the Eldercaring Coordinator attuned to your need for physical comfort?**

Yes  No

**What accommodations were provided to you?**

- Ramp or elevator  Printed materials with larger writing  Handrails in bathroom  
 Wheelchair/walker accessibility  Wide chairs  Snacks/beverage  
 Comfortable room temperature  Interpreter  
 Assisted listening device  Printed materials in a language other than English  
 Other: \_\_\_\_\_

**What accommodations were provided for the other participants?**

- Ramp or elevator  Printed materials with larger writing  Handrails in bathroom  
 Wheelchair/walker accessibility  Wide chairs  Snacks/beverage  
 Comfortable room temperature  Interpreter  
 Assisted listening device  Printed materials in a language other than English  
 Other: \_\_\_\_\_

**What time of day were the meetings?  Morning  Afternoon  Evening  Varied**

Was that time convenient for you?  Yes  No

**About how often were meetings?  Once a week  Alternate weeks  Once a month**

Scheduled upon request of the participants as needed

Did the meetings occur as often as you would like?  Yes  No

If no:  Too often  Not enough

Did the frequency of meetings change as the process continued?

Increased in frequency  Decreased in frequency

Stayed the same

**What methods were used so that you and other participants could easily participate?**

(Check all that apply)  Phone  Fax  Text  Email  Skype  Video conferencing  
 Other: \_\_\_\_\_

**Were you given enough time to voice your concerns?  Yes  No**

**How did you feel you were treated throughout the eldercaring coordination process?  
(Check all that apply)**

- With respect and dignity  
 Not forced into decisions that I strongly opposed  
 Spoken to as any other adult and not talked down to  
 Sometimes treated as a child  
 Not respected  
 Forced into decisions I didn't agree with

**IS THERE ANYTHING ELSE YOU WOULD LIKE US TO KNOW?**

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**POST-SURVEY: QUESTIONS FOR PARTICIPANTS OTHER THAN THE ELDER**

This interview would be given to the Participant within four weeks after the process has completed. *The questions posted are for data collection purposes only and not endorsing any practices or activities that are referenced.*

Your participation in the eldercaring coordination process was

- court-ordered  voluntary

Your relationship with the elder:

- Elder's sibling(s)  Elder's step-sibling(s)  
 Elder's current spouse/legally recognized partner  
 Elder's partner/significant other without legal recognition  
 Elder's previous spouse(s), partner(s), or significant other(s)  
 Elder's child(ren)  Your step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of Elder's child(ren)  
 Spouse(s), partner(s) or significant other(s) of Elder's step-child(ren)  
 Extended family  Friend(s)  Non-related caregiver(s)  
 Patient Advocate  Medical Surrogate  Power of Attorney  
 Doctor  Nurse  Geriatric Care Manager  Social Worker  
 Psychologist  Marriage and Family Therapist  Other mental health provider  
 Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy  
 Business partner(s)  Realtor  Funeral Director  Pet(s)  
 Other: \_\_\_\_\_

How long was your eldercaring coordination process?

- Less than one month  One to three months  Four to six months  
 Seven to nine months  10 months to 12months  13 months to 18 months  
 19 months to 24 months  More than 24 months

Why did the eldercaring coordination end?

- Conflicts were successfully resolved before the Eldercaring Coordinator's term was complete  
 Completion of the term allotted for the Eldercaring Coordinator  
 Eldercaring Coordinator asked to end his or her involvement in your case  
 Participants asked the judge to end the process  
 Participants asked the judge to replace the Eldercaring Coordinator  
 Other: \_\_\_\_\_

Did you continue to work in the eldercaring coordination process after the initial term of the Eldercaring Coordinator was completed?  Yes  No

If yes,  by court-ordered or  voluntarily

Has there been any change in circumstances for the elder since eldercaring coordination process started?

Was there a change in elder's residence?  Yes  No

If yes, elder now resides:

- By him/her self  With elder's sibling  
 With elder's current spouse/partner with legal rights  
 With elder's significant other/partner without legal rights  
 With elder's child  With elder's step-child  With elder's friend  
 Other: \_\_\_\_\_



Now elder resides in:

- Same house  Different house  Different apartment/Condo  
 Independent living facility  Assisted Living Facility or group home  
 Nursing home  Treatment facility

Now elder mostly spends days:  Alone  With family member day time

- With family member overnight  With other caregiver day time  
 With other caregiver overnight  Senior center or adult day program  
 In Assisted Living Facility  In nursing home  In treatment facility

Elder's care is:

- Provided by the same person(s) as before the eldercaring coordination process  
 Provided by different person(s) than when the eldercaring coordination process started  
 The responsibilities are shared more now

**Since eldercaring coordination, the elder's health:**

- Improved  Declined  Stayed the same

**Has the elder's need for care changed since the eldercaring coordination process started?**

- Needs less care  The amount of care I need has not changed  Needs more assistance

**Does the elder need assistance with (check all that apply):**

- Transportation  Preparing meals  Cleaning home  Maintaining home  
 Paying bills  Going to movies/entertainment  Eating  
 Bathing or other personal care  In-home medical care  
 Coordination of health care or social services  
 Other: \_\_\_\_\_

**Has the elder's need for care changed since the eldercaring coordination process started?**

- Needs less care  The amount of care needed has not changed  Needs more care

**Do you attribute any change of circumstances to the eldercaring coordination process?**

- Check all that apply:**  Change in residence  Change in care  
 Change in how elder spends his or her days

**How often do you see the elder now?**

- Resides with elder  More than once a week  Once a week  
 Twice a month  Once a month  Once every other month  
 Once in three months  Once in six months  One time in the past year

**Who provides the care for the elder now?**

- The same person(s) as before the eldercaring coordination process  
 Different person(s) than when the eldercaring coordination process started  
 The responsibilities are shared more now

**Are you a caregiver for the elder?**  Yes  No

If yes, on a regular basis what caregiving task(s) do you provide? Check all that apply:

- Transportation  Clean home  Maintain home  Pay bills  
 Go to movies/entertainment  
 Share activities in elder's home (cards, games, watch TV)  
 Prepare meals  Feed  Bathe or provide other personal care  
 Provide medical care  Coordinate health care or social services  
 Other: \_\_\_\_\_

**Has your caregiving changed?**  I spend less time caregiving  The responsibilities are shared more now  I spend more time caregiving

**Are you satisfied with the care the elder receives now?**  Yes  No

### **OUTCOME OF ELDERCARE COORDINATION PROCESS**

**Since the eldercare coordination process started, conflict has:**

- Increased  Decreased  Stayed the same

**Conflict was resolved between (check all that apply):**

- I don't know  
 Elder  Elder's sibling(s)  Elder's step-sibling(s)  
 Elder's current spouse/partner with legal rights  
 Elder's partner/significant other without legal rights  
 Elder's previous spouse(s), partners or significant others  
 Elder's biological child(ren)  Elder's step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of your child(ren)  
 Spouse(s), partner(s) or significant other(s) of your step-child(ren)  
 Extended family  Friend(s)  Non-related caregiver(s)  
 Patient Advocate  Medical Surrogate  Power of Attorney  
 Doctor  Nurse  Geriatric Care Manager  Social Worker  
 Psychologist  Marriage and Family Therapist  Other mental health provider  
 Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy  
 Business partner(s)  Realtor  Funeral Director  
 Other: \_\_\_\_\_

**Conflict continues between (check all that apply)**

- I don't know  
 Elder  Elder's sibling(s)  
 Elder's current spouse/partner with legal rights  
 Elder's partner/significant other without legal rights  
 Elder's previous spouse(s), partners or significant others  
 Elder's biological child(ren)  Elder's step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of your child(ren)  
 Spouse(s), partner(s) or significant other(s) of your step-child(ren)  
 Extended family  Friend(s)  Non-related caregiver(s)  
 Patient Advocate  Medical Surrogate  Power of Attorney  
 Doctor  Nurse  Geriatric Care Manager  Social Worker  
 Psychologist  Marriage and Family Therapist  Other mental health provider  
 Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy  
 Business partner(s)  Realtor  Funeral Director  
 Other: \_\_\_\_\_

**Issues that were resolved through eldercare coordination(check all that apply):**

- Family conflict in general  Elder's exposure to conflict  Elder's safety  
 Elder's place of residence  Who is able to spend time with elder  
 Elder's finances  Who makes decisions for elder  Elder's material possessions  
 Who provides care for elder  Elder's doctor or treatment  
 Coping with elder's memory loss  Coping with elder's decline in physical health

Coping with elder's mental health  Other: \_\_\_\_\_

**Issues that were not resolved through eldercaring coordination(check all that apply):**

- Family conflict in general  Elder's exposure to conflict  Elder's safety
- Elder's place of residence  Who is able to spend time with elder
- Elder's finances  Who makes decisions for elder  Elder's material possessions
- Who provides care for elder  Elder's doctor or treatment
- Coping with elder's memory loss  Coping with elder's decline in physical health
- Coping with elder's mental health  Other: \_\_\_\_\_

**In order to resolve conflict, the Eldercaring Coordinator took which actions? (check all that apply):**

- Helped to created an eldercare plan  Helped to modify an eldercare plan
- Helped to implement an eldercare plan  There was no plan

**The Eldercaring Coordinator referred the elder to the following resources (check all that apply):**

- Non-related caregivers  Attorneys  Guardian  Clergy
- Doctor  Financial Advisor  Patient Advocate  Social Worker
- Psychologist  Marriage & family therapist  Other mental health provider
- Geriatric Care Manager  Funeral Director
- Accountant  Business partner  Nurse  Mediator
- Guardian  Power of Attorney  Medical Surrogate
- Other: \_\_\_\_\_

**The Eldercaring Coordinator referred participants to the following resources (check all that apply):**

- Non-related caregivers  Attorneys  Guardian  Clergy
- Doctor  Financial Advisor  Patient Advocate  Social Worker
- Psychologist  Marriage & family therapist  Other mental health provider
- Geriatric Care Manager  Funeral Director
- Accountant  Business partner  Nurse  Mediator
- Guardian  Power of Attorney  Medical Surrogate
- Other: \_\_\_\_\_

**The Eldercaring Coordinator helped you make decisions regarding the following issues:**

- Who will make certain decisions about the elder's care and safety
- Procedure to follow when making decisions about the elder's care and safety
- What resources to use to help make decisions about the elder's care
- Other: \_\_\_\_\_

**The Eldercaring Coordinator made decisions regarding the following issues:**

- Who will make certain decisions about the elder's care and safety
- Procedure to follow when making decisions about the elder's care and safety
- What resources to use to help make decisions about the elder's care
- Other: \_\_\_\_\_

**What activities or services did you find most helpful? (check all that apply)**

- Meetings
- Calling the Eldercaring Coordinator for support
- Learning how to communicate better

- Formulated a plan to resolve issues
- Bringing in professionals during meetings to assist
- Referrals to community providers
- Other: \_\_\_\_\_

**Now that you completed the eldercaring coordination process, do you think it was successful?**  Yes  No

Are relationships between the elder and the other participants:

- Better  The same  Worse

Are relationships between you and the other participants:

- Better  The same  Worse

Are relationships among the other participants in general:

- Better  The same  Worse

Has communication improved and are the elder and other participants better able to talk with each other and respect each other's opinions?  Yes  No  I don't know

Are you worried that things might go back to the way they were before eldercaring coordination?  Yes  No

**Do you have a support group of family members you can call for assistance?**

- Yes  No

**Do you have a support group of professionals you can call for assistance?**

- Yes  No

**Are you more aware of community resources that might be helpful in the future?**

- Yes  No

**Do you think that the process will help the elder, you and other participants resolve issues together without going to court?**  Yes  No

**If you can't resolve issues in the future, are you more likely to go to elder mediation?**  Yes  No

**Do you feel more safe now that the eldercaring coordination process is over?**

- Less safe  The same as before  More safe

**What words best describe how you feel about the process now that it is over?**

- Don't like it  Don't know yet  Hopeful  Worried  Satisfied  
 Empowered  Pressured to participate  Confused  Scared  
 Other: \_\_\_\_\_

**How are you handling things on your own or with your family members since participating in the eldercaring coordination process ended?**

- Much better  Somewhat better  The same  Not as well  Much worse

**Would it be helpful to have a follow-up meeting in a few months with the Eldercaring Coordination to evaluate the resolution and discuss any issues?**

Yes  No  I don't know

**Would you like the eldercaring coordination process to continue?**

Yes  No  I don't know

**If yes, have you spoken with your Eldercaring Coordinator about continuing the process?**  Yes  No

**Overall, are you satisfied with the eldercaring coordination process?**  Yes  No

Do you believe there were fewer or no issues to take to court because of this process.  
 Yes  No

**Would you recommend the eldercaring coordination process to others?**  Very much

Somewhat  I don't know  Not so much  Never

**Is there anything else that you wish your Eldercaring Coordinator had known or done that could have improved the process?**

Yes  No

If yes, what: \_\_\_\_\_

**Are there any changes or additions you would make to improve this process for improvement?**

\_\_\_\_\_

### **SAFETY CONCERNS DURING THE ELDERCARING COORDINATION PROCESS**

Were there any safety concerns regarding the elder during the eldercaring coordination process?

Yes  No

If yes, what safety concerns were revealed during the eldercaring coordination process?

(Check all that apply)

Elder abuse  Elder neglect  Domestic Violence  Family Violence

Coercion  Deception  Exploitation/taking advantage of elder

Extortion/blackmail  Fraud

Kidnapping  Robbery  Stalking  Substance abuse

Perpetrated by whom? \_\_\_\_\_

**Were safety concerns revealed regarding another party, other than the elder, that was involved in the process?**  Yes  No

**Were authorities contacted during the process regarding any safety issue?**  Yes

No

If yes, the following were notified:  Police  Doctor

Adult Protective Services or Child Protective Services  Court

Other: \_\_\_\_\_

**Did the Eldercaring Coordinator ask you questions to screen for elder abuse, neglect, and exploitation?**

Once, at the beginning of the process  Several times throughout the process

- Never  
 Were you by yourself or with others when asked?  By myself  
 With others  By myself and with others  
 Did you feel comfortable answering openly and honestly?  Yes  No

**Do you have any concerns regarding the safety of the elder now that the eldercaring coordination process is over?**  Yes  No

**Do you have concerns about your safety or the safety of any of the participants now that the eldercaring coordination process is over?**  
 Yes  No

**OVERVIEW OF THE ELDERCARING COORDINATION PROCESS**

**Conflict was resolved between (check all that apply)**

- I don't know
- Elder  Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)  Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_

**Conflict has continued between (check all that apply)**

- I don't know
- Elder  Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)  Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_

**What issues were addressed during the eldercaring coordination process (check all that apply):**

- Family conflict in general  Elder's exposure to conflict  Elder's safety

- Elder's place of residence  Who is able to spend time with elder
- Elder's finances  Who makes decisions for elder  Elder's material possessions
- Who provides care for elder  Elder's doctor or treatment
- Coping with elder's memory loss  Coping with elder's decline in physical health
- Coping with elder's mental health  Other: \_\_\_\_\_

**What factors contributed to the conflict? (Check all that apply)**

- Problems with elder's sibling(s)
- Problems with elder's step-sibling(s)
- Problems with elder's current spouse/partner with legal rights
- Problems with elder's significant other/partner with no legal rights
- Problems with elder's previous spouse, partner or significant other
- Elder's children don't get along
- Elder's step-child(ren) don't get along
- Elder's child(ren) and step-child(ren) don't get along
- Elder's child(ren) and/or step-child(ren) don't get along with your spouse/partner/significant other
- Elder's decline in physical health
- Elder's memory loss
- Elder's mental health concerns
- Concerns regarding elder's ability to make decisions for yourself
- Financial/business issues
- Other: \_\_\_\_\_

**How or through whom have you tried to resolve conflict since the eldercaring coordination process began? (Check all that apply)**

- Court  Elder Mediation  Attorney  Family member  Friend
- Doctor  Nurse  Nonrelated caregiver  Social Worker  Psychologist
- Marriage and Family Therapist  Other mental health professional
- Geriatric Care Manager  Clergy  Police
- Other: \_\_\_\_\_

**Issues were brought to court for clarification or further direction by whom? (Check all that apply)**

- No issues were brought to court  The elder/elder's attorney
- Other participants in eldercaring coordination process  The Guardian
- The Eldercaring Coordinator  Other: \_\_\_\_\_

Issues were those that should have been resolved, if possible:  by the eldercaring coordination process  outside of the eldercaring coordination process.

**Were agreements made during the eldercaring coordination process?  Yes  No**

- If yes, the agreements made were related to (check all that apply):  Elder's care
- Medical treatment  House  Possessions  Personal relationships  Residence of elder  Community resources
  - Other: \_\_\_\_\_

**Did the court order include the types of decisions the Eldercaring Coordinator could make?**

- Yes  No
- If yes, regarding what?  Elder's care  Who could spend time with elder

- Medical treatment    House    Possessions    Personal relationships  
 Residence of elder    Community resources  
 Other: \_\_\_\_\_

**Did the elder and parties give the Eldercaring Coordinator additional decision-making authority?**

- Yes    No  
 Yes    No  
 If yes, regarding what?    Elder's care    Who could spend time with elder  
 Medical treatment    House    Possessions    Personal relationships  
 Residence of elder    Community resources  
 Other: \_\_\_\_\_

**ELDERCARING COORDINATION PARTICIPANTS**

**Did the elder participate in the process?**    Yes    No

- If yes, describe the elder's level of participation:    Active and verbal in all meetings  
 Active and verbal in some meetings  
 Physically present but not very verbal in all meetings  
 Physically present but not very verbal in some meetings  
 Not physically present in most or any of the meetings  
 Elder couldn't make it to the meetings so attended by telephone or video conferencing

**Do you feel comfortable about your participation in the process?**    Yes    No

**Describe your level of participation:**

- Active and verbal in all meetings    Active and verbal in some meetings  
 Physically present but not very verbal in all meetings  
 Physically present but not very verbal in some meetings  
 Not physically present in most or any of the meetings  
 Elder couldn't make it to the meetings so attended by telephone or video conferencing

**The following were court-ordered to participate in the eldercaring coordination process:**

- I don't know  
 Elder    Elder's sibling(s)  
 Elder's current spouse/partner with legal rights  
 Elder's partner/significant other without legal rights  
 Elder's previous spouse(s), partners or significant others  
 Elder's biological child(ren)    Elder's step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)  
 Extended family    Friend(s)    Non-related caregiver(s)  
 Patient Advocate    Medical Surrogate    Power of Attorney  
 Doctor    Nurse    Geriatric Care Manager    Social Worker  
 Psychologist    Marriage and Family Therapist    Other mental health provider  
 Attorney    Guardian    Mediator    Accountant    Financial Advisor    Clergy  
 Business partner(s)    Realtor    Funeral Director  
 Other: \_\_\_\_\_



**List those who were invited and voluntarily participated in the eldercaring coordination process (check all that apply):**

- I don't know
- Elder       Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)    Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)
- Extended family    Friend(s)    Non-related caregiver(s)
- Patient Advocate    Medical Surrogate    Power of Attorney
- Doctor    Nurse    Geriatric Care Manager    Social Worker
- Psychologist    Marriage and Family Therapist    Other mental health provider
- Attorney    Guardian    Mediator    Accountant    Financial Advisor    Clergy
- Business partner(s)    Realtor    Funeral Director    Pet(s)
- Other: \_\_\_\_\_

**List the participants that were helpful in the eldercaring coordination process (check all that apply):**

- I don't know
- Elder       Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)    Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of your child(ren)
- Spouse(s), partner(s) or significant other(s) of your step-child(ren)
- Extended family    Friend(s)    Non-related caregiver(s)
- Patient Advocate    Medical Surrogate    Power of Attorney
- Doctor    Nurse    Geriatric Care Manager    Social Worker
- Psychologist    Marriage and Family Therapist    Other mental health provider
- Attorney    Guardian    Mediator    Accountant    Financial Advisor    Clergy
- Business partner(s)    Realtor    Funeral Director    Pet(s)
- Other: \_\_\_\_\_

**List the participants you think impeded the eldercaring coordination process? (check all that apply):**

- I don't know
- Elder       Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)    Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)
- Extended family    Friend(s)    Non-related caregiver(s)
- Patient Advocate    Medical Surrogate    Power of Attorney
- Doctor    Nurse    Geriatric Care Manager    Social Worker
- Psychologist    Marriage and Family Therapist    Other mental health provider
- Attorney    Guardian    Mediator    Accountant    Financial Advisor    Clergy

- Business partner(s)    Realtor    Funeral Director    Pet(s)  
 Other: \_\_\_\_\_

**Do you think that everyone who has been involved in the dispute is participating in this resolution process?**    Yes    No

**List who, in hindsight, you think should have been invited to the process that wasn't (check all that apply):**

- I don't know  
 Elder    Elder's sibling(s)  
 Elder's current spouse/partner with legal rights  
 Elder's partner/significant other without legal rights  
 Elder's previous spouse(s), partners or significant others  
 Elder's biological child(ren)    Elder's step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)  
 Extended family    Friend(s)    Non-related caregiver(s)  
 Patient Advocate    Medical Surrogate    Power of Attorney  
 Doctor    Nurse    Geriatric Care Manager    Social Worker  
 Psychologist    Marriage and Family Therapist    Other mental health provider  
 Attorney    Guardian    Mediator    Accountant    Financial Advisor    Clergy  
 Business partner(s)    Realtor    Funeral Director    Pet(s)  
 Other: \_\_\_\_\_

#### **FEES/AFFORDABILITY**

**Were you court-ordered to share costs of eldercaring coordination?**    Yes    No

**Who paid for the eldercaring coordination process? (Check all that apply)**

- No one as there were no fees charged    You    Your sibling(s)    Your biological child(ren)  
 Your step-child(ren)    Your spouse/partner with legal rights  
 Your significant other/partner with no legal rights  
 Your previous spouse, partner or significant other    Extended family member    Friend  
 Business partner    Other: \_\_\_\_\_  
 I don't know

**Did the Eldercaring Coordinator adjust his or her fees according to your ability to afford the process?**    Yes    No

**What were the Eldercaring Coordinator's fees?**

- Less than \$50 per hour    \$51 to \$75 per hour    \$75 to \$100 per hour  
 \$101 to \$125 per hour    \$126 to \$150 per hour    \$151 to \$175 per hour  
 \$176 to \$200 per hour    \$201 to \$250 per hour    \$250 to \$300 per hour  
 More than \$300 per hour

**Did the Eldercaring Coordinator charge a retainer?**    Yes    No

If yes, how much? \_\_\_\_\_

**How were fees were paid? (check all that apply):**

- Paid fully by one party    Shared equally    Split according to ability to pay  
 No fee being charged    Designated by court order    Decided voluntarily

I don't know  Other: \_\_\_\_\_

**Did the judge prorate the fees according to who could most easily afford the eldercaring coordination process?**

Yes  No

**Did the judge reconsider the fee allocation due to the behavior of a specific participant and have that person pay more?**  Yes  No

**What was the total cost of the eldercaring process from start to finish?**

\_\_\_\_\_  I don't know

**Were fees an area of contention:** Between participants?  Yes  No

Between the Eldercaring Coordinator and participants?  Yes  No

**Were the number of meetings reduced to decrease the costs?**  Yes  No

**How did the Eldercaring Coordinator try to resolve fee issues? (Check all that apply):**

Privately spoke with the party withholding payment

Spoke with the party jointly with the others in the process

Another party offered to share costs

Scheduled fewer meetings to reduce the costs

Informed the court

If the court was informed, did the judge order fees to be paid?  Yes  No

## QUESTIONS ABOUT THE ELDERCARING COORDINATOR

**Did you like your Eldercaring Coordinator?**  Yes  No

If yes, why? Check all that apply:

He/She listened to me  He/She listened to the elder

He/She agreed with me  He/She agreed with the elder

He/She tried to reduce the conflict

He/She explained the process so I can understand it

He/She was patient  He/She was knowledgeable about how to reduce conflict

He/She seemed to understand me  He/She seemed to understand the elder

He/She stuck up for me in front of the others in the meetings

He/She stuck up for the elder  He/She didn't judge me

He/She influenced others to agree with my position

He/She didn't embarrass me  He/She didn't embarrass the elder

Other: \_\_\_\_\_

If no, why? Check all that apply:  He/She didn't give me time to speak

He/She never agreed with me  He/She didn't making any difference

He/She didn't explain the process so I could understand it

He/She pressured me to speak when I didn't want to

He/She pressured the elder to speak

He/She was not knowledgeable about how to reduce conflict

He/She was not able to influence others to agree with my position

He/She pressured me to make decisions

He/She pressured the elder to make decisions

- He/She embarrassed me     He/She embarrassed the elder  
 He/She judged me     He/She judged the elder  
 Other: \_\_\_\_\_

**How old was your Eldercaring Coordinator:**  25-35 years  36-45 years  46-55 years  
 56-65 years  Over 65 years

Would you prefer your Eldercaring Coordinator to be:

- Younger  Older  Didn't matter

**Was your Eldercaring Coordinator**  Male  Female

Would you prefer your Eldercaring Coordinator to have been:

- Male  Female  Didn't matter

**Do you think the Eldercaring Coordinator was fair?**  Yes  No

If no, do you think the Eldercaring Coordinator was taking sides?  Yes  No

Whose side? \_\_\_\_\_

**Do you trust the Eldercaring Coordinator to have had the elder's best interest at heart?**

- Yes  No

**During the eldercaring coordination process, the Eldercaring Coordinator (check all that apply):**

- Facilitated more effective communication, negotiation, and problem-solving skills;
- Provided education about elder care resources
- Facilitated the creation of an elder care plan
- Modified an existing elder care plan
- Assisted in the implementation of an elder care plan
- Made recommendations for resolutions
- Made decisions within the scope of a court order
- Made decisions upon the request of the parties
- Made decisions outside the scope of the order or without parties' approval

**Were there any complaints made against the Eldercaring Coordinator?**  Yes  No

If Yes, was a complaint made by:  Elder  Other participant

Was the complaint made in writing and given to the Eldercaring Coordinator?

- Yes  No

Was the complaint discussed with the Eldercaring Coordinator?  Yes  No

If yes, was the complaint resolved?  Yes  No

Was the complaint taken to the judge?  Yes  No

Did the Eldercaring Coordinator testify?  Yes  No

If yes, was the Eldercaring Coordinator taken off your case?  Yes  No

If yes, was that because:

- The Eldercaring Coordinator asked the court to be discharged as this case was not amenable to the eldercaring coordination process
- The court wanted to avoid a conflict of interest since the Eldercaring Coordinator just testified
- The elder or participants asked that the Eldercaring Coordinator be discharged from the case
- The court found fault in the performance of the Eldercaring Coordinator

Was another Eldercaring Coordinator appointed?  Yes  No

The complaint was: \_\_\_\_\_

## ELDERCARING COORDINATION EXPERIENCE

### Location of meetings (check all that apply):

Eldercaring Coordinator's Office  Your office or home  Attorney's Office  Elder's residence  Family Member's Home  Religious setting  Other \_\_\_\_\_

### Was the location(s) comfortable? Yes No

Was the location(s) convenient/Close by?  Yes  No

Was there adequate parking or other transportation?  Yes  No

Was the Eldercaring Coordinator attuned to the elder's need for physical comfort?

Yes  No

Was the Eldercaring Coordinator attuned to the physical needs of you and the other participants during the meetings?  Yes  No

### What accommodations were provided to the elder? Ramp or elevator

Printed materials with larger writing  Handrails in bathroom  Wheelchair/walker accessibility  Wide chairs  Snacks/beverage  Comfortable room temperature

Interpreter  Printed materials in a language other than English

Assisted listening device  Other: \_\_\_\_\_

### What accommodations were provided for you or the other participants?

Ramp or elevator  Printed materials with larger writing  Handrails in bathroom

Wheelchair/walker accessibility  Wide chairs  Snacks/beverage

Comfortable room temperature  Interpreter

Printed materials in a language other than English  Assisted listening device

Other: \_\_\_\_\_

### What time of day were the meetings? Morning Afternoon Evening Varied

Was that time convenient for you?  Yes  No

How often were meetings?  Once a week  Alternate weeks  Once a month

Scheduled according to the request of participants as needed

Did the meetings occur as often as you would like?  Yes  No

If no:  Too often  Not enough

Did the frequency of meetings change as the process continued?

Increased in frequency  Decreased in frequency

Stayed the same

**How did you communicate during the process? (Check all that apply)**  Phone  Fax  Text  Email  Skype  Video conferencing  Other

**Were you given enough time to voice your concerns?**  Yes  No

**I felt that I was:**  Treated with respect and dignity

Not forced into decisions that I strongly opposed

Spoken to appropriately and not talked down to  Not respected

Forced into decisions I didn't agree with

**Is there anything else you would like us to know?**

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**POST-SURVEY: QUESTIONS FOR ELDERCARE COORDINATOR**

This interview would be given to the Eldercare Coordinator within four weeks after the process is completed. *The questions posted are for data collection purposes only and not endorsing any practices or activities that are referenced.*

This Eldercare Coordination case was:  Court-ordered  Voluntary

**How long was your Eldercare coordination process?**

- Less than one month  One to three months  Four to six months
- Seven to nine months  Ten months to twelve months  13 months to 18 months
- 19 months to 24 months  More than 24 months

**Why did the Eldercare coordination end?**

- Conflicts were successfully resolved before the Eldercare Coordinator's term was complete
- Completion of the term allotted for the Eldercare Coordinator
- Eldercare Coordinator asked to end his or her involvement in your case
- Participants asked the judge to end the process
- Participants asked the judge to replace the Eldercare Coordinator
- Other: \_\_\_\_\_

**Are you continuing to work as Eldercare Coordinator for this case after your initial term was completed?**  Yes  No

If yes,  by court order or  voluntarily as per the request of the parties

**Has there been any change in circumstances for the elder since Eldercare coordination process started?**  Yes  No

Was there a change in the elder's residence?  Yes  No

If yes, the elder now resides:

- By him or her self  With his or her spouse/partner with legal rights  With his significant other/partner without legal rights  His or her sibling  With his or her biological child  His or her step-child  With his or her parent  With Friend
- Other: \_\_\_\_\_

Now reside in:  Different house  Different apartment/Condo  
 Assisted Living Facility  Nursing home  Treatment facility

Now elder spends days mostly:  Alone  At work  With family member day time  
 With family member overnight  With other caregiver day time  
 With other caregiver overnights  Senior center or adult day program  
 In nursing home  In treatment facility

Elder receives assistance with (check all that apply):  Transportation  
 Transportation  Preparing meals  Cleaning home  Maintaining house  
 Paying bills  Going to movies/entertainment  Eating  
 Bathing or other personal care  In-home medical care  
 Coordination of health care or social services  
 Other: \_\_\_\_\_

**Since Eldercare coordination, did elder's health:**

Improve  Decline  Stay the same

**Has the elder's need for care changed since the eldercaring coordination process started?**

- Needs less care  The amount of care needed has not changed  Needs more care

**Who currently provides care for the elder?**  Provided by the same person(s) as before the eldercaring coordination process  Provided by different person(s) than when the eldercaring coordination process started  The responsibilities are shared more now

**Are you a caregiver for the elder?**  Yes  No

If yes, on a regular basis what caregiving task(s) do you provide? Check all that apply:

- Transportation  Clean home  Pay bills  
 Go to movies/entertainment  
 Share activities in elder's home (cards, games, watch TV)  
 Prepare meals  Feed  Bathe or provide other personal care  
 Provide medical care  Coordinate health care or social services  
 Other: \_\_\_\_\_

**OUTCOME OF ELDERCARING COORDINATION PROCESS**

**Since the eldercaring coordination process started, conflict has:**

- Increased  Decreased  Stayed the same

**Conflict was resolved between (check all that apply)**

- I don't know  
 Elder  Elder's sibling(s)  Elder's step-sibling(s)  
 Elder's current spouse/partner with legal rights  
 Elder's partner/significant other without legal rights  
 Elder's previous spouse(s), partners or significant others  
 Elder's biological child(ren)  Elder's step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)  
 Extended family  Friend(s)  Non-related caregiver(s)  
 Patient Advocate  Medical Surrogate  Power of Attorney  
 Doctor  Nurse  Geriatric Care Manager  Social Worker  
 Psychologist  Marriage and Family Therapist  Other mental health provider  
 Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy  
 Business partner(s)  Realtor  Funeral Director  
 Other: \_\_\_\_\_

**Conflict continues between (check all that apply)**

- I don't know  
 Elder  Elder's sibling(s)  
 Elder's current spouse/partner with legal rights  
 Elder's partner/significant other without legal rights  
 Elder's previous spouse(s), partners or significant others  
 Elder's biological child(ren)  Elder's step-child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's child(ren)  
 Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)  
 Extended family  Friend(s)  Non-related caregiver(s)  
 Patient Advocate  Medical Surrogate  Power of Attorney  
 Doctor  Nurse  Geriatric Care Manager  Social Worker  
 Psychologist  Marriage and Family Therapist  Other mental health provider

- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy  
 Business partner(s)  Realtor  Funeral Director  
 Other: \_\_\_\_\_

**Issues that were resolved through eldercaring coordination:**

- Family conflict in general  Elder's exposure to conflict  Elder's safety  
 Elder's place of residence  Who is able to spend time with elder  
 Elder's finances  Who makes decisions for elder  Elder's material possessions  
 Who provides care for elder  Elder's doctor or treatment  
 Coping with elder's memory loss  Coping with elder's decline in physical health  
 Coping with elder's mental health  Other: \_\_\_\_\_

**Issues that were not resolved through eldercaring coordination:**

- Family conflict in general  Elder's exposure to conflict  Elder's safety  
 Elder's place of residence  Who is able to spend time with elder  
 Elder's finances  Who makes decisions for elder  Elder's material possessions  
 Who provides care for elder  Elder's doctor or treatment  
 Coping with elder's memory loss  Coping with elder's decline in physical health  
 Coping with elder's mental health  Other: \_\_\_\_\_

**In order to resolve conflict, you (check all that apply):**

- Did not work with an elder care plan  Created an eldercare plan  
 Modified an eldercare plan  Helped elder and parties implement an eldercare plan

**Did you facilitate referrals for the elder during the eldercaring coordination process?**

**(check all that apply):**  Yes  No

If yes, where did you refer the elder?

- Non-related caregivers  Attorneys  Guardian  Clergy  
 Doctor  Financial Advisor  Patient Advocate  Social Worker  
 Psychologist  Marriage & family therapist  Other mental health provider  
 Geriatric Care Manager  Funeral Director  
 Accountant  Business partner  Nurse  Mediator  
 Guardian  Power of Attorney  Medical Surrogate

Other: \_\_\_\_\_

**Did you provide a referral for the other participants of the eldercaring coordination process?**  Yes  No

- Non-related caregivers  Attorneys  Guardian  Clergy  
 Doctor  Financial Advisor  Patient Advocate  Social Worker  
 Psychologist  Marriage & family therapist  Other mental health provider  
 Geriatric Care Manager  Funeral Director  
 Accountant  Business partner  Nurse  Mediator  
 Guardian  Power of Attorney  Medical Surrogate

Other: \_\_\_\_\_

**Did you make any decisions regarding the following issues:**

- Who will make certain decisions about the elder's care and safety  
 Procedure to follow when making decisions about the elder's care and safety  
 What resources to use to help make decisions about the elder's care and safety  
 Other: \_\_\_\_\_



**What activities or services that you provided do you believe were most helpful? (Check three)**

- Meetings
- Being available to the elder and other participants in the eldercaring coordination process for support
- Helping the elder and other participants learn how to communicate better
- Formulated a plan to resolve issues
- Bringing in professionals during meetings to assist
- Referring to community providers
- Other: \_\_\_\_\_

**Now that you completed the process, do you think it was successful?  Yes  No**

Are relationships between elder and other participants:

- Better  The same  Worse

Are relationships among the other participants themselves:

- Better  The same  Worse

Has communication improved where elder and other participants better able to talk with each other and respect each other's opinions?  Yes  No

Are you concerned that the elder and other participants will revert to old patterns the way they were before the eldercaring coordination process?  Yes  No

Do you think they will be able to implement the tools necessary to support each other during transitions in the future?  Yes  No

Do you think that they will be able to cooperate without putting the elder in the middle?  
 Yes  No

**Are the parties using community resources more efficiently since the eldercaring coordination process ended?  Yes  No**

Did you provide the elder and participants with a support group of professionals they can call for assistance?  Yes  No

**If yes, who did this include? (Check all that apply):**

- Non-related caregivers  Attorneys  Guardian  Clergy
- Doctor  Financial Advisor  Patient Advocate  Social Worker
- Psychologist  Marriage & family therapist  Other mental health provider
- Geriatric Care Manager  Funeral Director
- Accountant  Business partner  Nurse  Mediator
- Guardian  Power of Attorney  Medical Surrogate

Other: \_\_\_\_\_

**Do you think that the eldercaring coordination process helped the elder and other participants resolve issues together without going to court as often or at all?**

- Yes  No

**Do you think that they will be more likely to go to elder mediation if they have issues to resolve in the future?  Yes  No**

**Would it be helpful to have a follow-up meeting in a few months after the eldercaring coordination is over in order to evaluate the resolution and discuss any issues?**

Yes  No  I don't know

**Overall, I am satisfied with the outcome(s) of this eldercaring coordination process.**

Yes  No

**Do you think that the parties continue to need eldercaring coordination?**

Yes  No

**What would have made this process more successful with these specific parties?**

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**Is there anything else as the Eldercaring Coordinator that you wish you had knowledge about that could have improved the process?**

Yes  No

If yes, what additional training would be helpful? \_\_\_\_\_

**In general, would you recommend eldercaring coordination to others?**

Yes  No

**What changes or additions could you suggest to improve the eldercaring coordination process?**

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#### **SAFETY CONCERNS DURING THE ELDERCARING COORDINATION PROCESS**

**Did you screen for the elder's capacity to participate in the eldercaring coordination process?**

Yes  No

How often?  Only during intake process  Once monthly  Bi-monthly  Every three months  Every six months  Yearly  Only if I thought it was needed again  Never

**Did you screen the elder for elder abuse, neglect and exploitation during the eldercaring coordination process?**

Yes  No

How often?  Only during intake process  Once monthly  Bi-monthly  Every three months  Every six months  Yearly  Only if I thought it was needed again  Never

**Did you screen the elder separately from the other participants?**  Yes  No  Partially jointly, partially separately

**Did you screen the other participants for capacity to participate in the eldercaring coordination process?**  Separately  Jointly  Partially jointly, partially separately

I did not screen any participants  I screened only some of the participants

How often?  Only during intake process  Once monthly  Bi-monthly  Every three months  Every six months  Yearly  Only if I thought it was needed again  Never

**Did you screen the other participants for safety issues?**  Separately  Jointly  Partially jointly, partially separately  I did not screen any participants  I screened only some of the participants

How often?  Only during intake process  Once monthly  Bi-monthly  Every three months  Every six months  Yearly  Only if I thought it was needed again  Never

Did you use any specific screening tools?  Yes  No If Yes, which one(s)?

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**Were there any safety concerns during the eldercaring coordination process?**

Yes  No

If yes, what safety concerns were revealed during the eldercaring coordination process? (Check all that apply)

Elder abuse  Elder neglect  Domestic Violence  Family Violence  
 Coercion  Deception  Exploitation/taking advantage of you  Fraud  
 Extortion/blackmail  Kidnapping  Robbery  Stalking  Substance abuse

#1 Perpetrated by whom? \_\_\_\_\_  
Against whom? \_\_\_\_\_

#2 Perpetrated by whom? \_\_\_\_\_  
Against whom? \_\_\_\_\_

#3 Perpetrated by whom? \_\_\_\_\_  
Against whom? \_\_\_\_\_

**Did you believe that the elder was at risk for harm during the eldercaring coordination process?**  Yes  No

**Other than the elder, did you think that another participating party was at risk of harm?**  
 Yes  No

**Were you concerned for your safety as the Eldercaring Coordinator during the Eldercaring Coordination?**  Yes  No

**Were authorities contacted during the eldercaring coordination process?**  Yes  No

If yes, the following were notified:  Police  Doctor  
 Adult Protective Services or Child Protective Services  Court  
 Other: \_\_\_\_\_

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**Was the eldercaring coordination process affected by the safety risks?**  Yes  No

If yes,  Court was informed of risk  Eldercaring coordination process was suspended

**Do you have any concerns now that the eldercaring coordination process is over regarding safety?**  of the Elder  Of other participant(s) in the eldercaring coordination process  For yourself  No concerns

## OVERVIEW OF THE ELDERCARING COORDINATION PROCESS

**Issues of conflict that were addressed during the eldercaring coordination process (check all that apply):**

- Family conflict in general
- Elder's exposure to conflict
- Elder's safety
- Elder's residence
- Who is able to spend time with you
- Elder's finances
- Who makes decisions for the elder
- Who provides care for the elder
- Elder's doctor or treatment
- Elder's memory, mental health or physical limitations
- Elder's material possessions
- Other: \_\_\_\_\_

**Was factors contributed to the conflict? (Check all that apply)**

- Problems with elder's sibling(s)
- Problems with elder's step-sibling(s)
- Problems with elder's current spouse/partner with legal rights
- Problems with elder's significant other/partner with no legal rights
- Problems with elder's previous spouse, partner or significant other
- Elder's children don't get along
- Elder's step-child(ren) don't get along
- Elder's child(ren) and step-child(ren) don't get along
- Elder's child(ren) and/or step-child(ren) don't get along with elder's spouse/partner/significant other
- Elder's decline in physical health
- Elder's memory loss
- Elder's mental health concerns
- Concerns regarding elder's ability to make decisions for him or herself
- Financial/business issues
- Other: \_\_\_\_\_

**How or through whom have you tried to resolve conflict since the process began? (Check all that apply)**

- Court
- Elder Mediation
- Attorney
- Family member
- Friend
- Doctor
- Nurse
- Nonrelated caregiver
- Social Worker
- Psychologist
- Marriage and Family Therapist
- Other mental health professional
- Geriatric Care Manager
- Clergy
- Police
- Other: \_\_\_\_\_

**Issues were brought to court for clarification or further direction by whom? (Check all that apply)**

- No issues were brought to court
- The elder/elder's attorney
- Other parties participating in the eldercaring coordination process
- The Guardian
- You, as the Eldercaring Coordinator
- Other: \_\_\_\_\_

**Were agreements made during the eldercaring coordination process?  Yes  No**

If yes, the agreements made were related to (check all that apply):

- Elder's care
- Medical treatment
- Elder's house
- Possessions
- Personal relationships
- Elder's place of residence
- Visitors
- Community resources
- Other: \_\_\_\_\_

**Did the court order include the types of decisions that you, as the Eldercaring Coordinator, could make?**

Yes  No

If yes, regarding what?  Elder's care  Medical treatment  Elder's house

Possessions  Personal relationships  Elder's place of residence

Visitors  Community resources

Other: \_\_\_\_\_

**Did the elder give you, as the Eldercaring Coordinator, additional decision-making authority?**

Yes  No

Did the other participants in the eldercaring coordination process agree for you to make those decisions?  Yes  No

What decisions were you asked to make?  Elder's care

Medical treatment  House  Possessions  Personal relationships

Residence of elder  Community resources

Other: \_\_\_\_\_

**ELDERCARING COORDINATION PARTICIPANTS**

**Describe the elder's capacity to attend and participate in appointments:**

Active and verbal in all meetings  Active and verbal in some meetings

Physically present but not very verbal in all meetings

Not physically present in most or any of the meetings

Not able to comprehend discussions but physically present when able  Did not participate

**The following were court-ordered to participate in the eldercaring coordination process:**

Elder  Elder's sibling(s)

Elder's current spouse/partner with legal rights

Elder's partner/significant other without legal rights

Elder's previous spouse(s), partners or significant others

Elder's biological child(ren)  Elder's step-child(ren)

Spouse(s), partner(s) or significant other(s) of elder's child(ren)

Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)

Extended family  Friend(s)  Non-related caregiver(s)

Patient Advocate  Medical Surrogate  Power of Attorney

Doctor  Nurse  Geriatric Care Manager  Social Worker

Psychologist  Marriage and Family Therapist  Other mental health provider

Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy

Business partner(s)  Realtor  Funeral Director  Pet(s)

Other: \_\_\_\_\_

I don't know

**List those who were invited and participated in the eldercaring coordination process (check all that apply):**

Elder  Elder's sibling(s)

Elder's current spouse/partner with legal rights

Elder's partner/significant other without legal rights

Elder's previous spouse(s), partners or significant others

Elder's biological child(ren)  Elder's step-child(ren)

Spouse(s), partner(s) or significant other(s) of elder's child(ren)

Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)

Extended family  Friend(s)  Non-related caregiver(s)

- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_
- I don't know

**List the parties that were helpful in the eldercaring coordination process (check all that apply):**

- Elder  Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)  Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_
- I don't know

**List the parties you think impeded the eldercaring coordination process(check all that apply):**

- Elder  Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)  Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_

**Do you think that everyone who has been involved in your dispute participated in this resolution process?  Yes  No**

**List who, in hindsight, you think should have been invited to the process that wasn't (check all that apply):**

- Everyone essential was involved
- Elder  Elder's sibling(s)
- Elder's current spouse/partner with legal rights

- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)  Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director  Pet(s)
- Other: \_\_\_\_\_
- I don't know

**List those that were invited but refused to participate:**

- Elder  Elder's sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)  Elder's step-child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's child(ren)
- Spouse(s), partner(s) or significant other(s) of elder's step-child(ren)
- Extended family  Friend(s)  Non-related caregiver(s)
- Patient Advocate  Medical Surrogate  Power of Attorney
- Doctor  Nurse  Geriatric Care Manager  Social Worker
- Psychologist  Marriage and Family Therapist  Other mental health provider
- Attorney  Guardian  Mediator  Accountant  Financial Advisor  Clergy
- Business partner(s)  Realtor  Funeral Director
- Other: \_\_\_\_\_

**FEES/AFFORDABILITY**

**What are your fees?**

- Less than \$50 per hour  Up to \$75 per hour  Up to \$100 per hour
- Up to \$125 per hour  Up to \$150 per hour  Up to \$175 per hour
- Up to \$200 per hour  Up to \$250 per hour  Up to \$300 per hour
- More than \$300 per hour

**Do you charge a retainer?**  Yes  No

Do you have sliding scale options?  Yes  No

**Will you work on an eldercaring coordination case pro bono?**  Yes  No

**Regarding the current case:**

**Were there fees charged for this eldercaring coordination process?**  Yes  No

**What was your term as Eldercaring Coordinator for this case:**

- One month or less  Between one month and three months  Between three months and six months
- Between nine months and 12 months  Between 15 months and 18 months
- Between 21 months and 18 months  Between 24 months and 18 months
- More than 24 months

**If no fees were charged, disregard the following questions:**

**Who paid for the eldercaring coordination process? (Check all that apply)**

- No one as there were no fees charged  Elder
- Elder's sibling(s)  Elder's step-sibling(s)
- Elder's current spouse/partner with legal rights
- Elder's partner/significant other without legal rights
- Elder's previous spouse(s), partners or significant others
- Elder's biological child(ren)  Elder's step-child(ren)
- Spouse(s), partner(s), or significant other(s) of elder's child(ren)
- Spouses, partner(s), or significant other(s) of elder's step-child(ren)
- Extended family  Friend(s)
- Business partner  Other: \_\_\_\_\_

**Did you adjust their fees according to participants' ability to pay?**

- Yes  No

How were fees paid? (check all that apply):

- Paid fully by one party  Shared equally  Split according to ability to pay
- No fee being charged  Designated by court order  Decided voluntarily
- I don't know  Other: \_\_\_\_\_

Did the judge prorate the fees according to who could most easily afford the process?

- Yes  No

Did the judge reconsider the fee allocation due to the behavior of a participant and have that person pay more?  Yes  No

**What was the total cost of the eldercaring coordination process from start to finish?** \_\_\_\_\_

Were fees an area of contention?  Yes  No

Were meeting times adjusted to reduce costs?  Yes  No

Did the cost have an effect on the outcome?  Yes  No

Were there issues regarding payment of your fees as Eldercaring Coordinator by any of the parties?  Yes  No

If yes, how did you, as the Eldercaring Coordinator, try to resolve the issue? (Check all that apply):  Privately spoke with the party withholding payment  Spoke with the party jointly with the others in the process  Another party offered to share costs  Informed the court

If the court was informed, did the judge order fees to be paid?  Yes  No

**ELDERCARING COORDINATOR**

**What is your age?**  25-35 years  36-45 years  46-55 years  55-65 years  over 65 years

**Are you**  Male  Female  Transgender

**During the eldercaring coordination process, did you perform any of the following activities? (check all that apply):**

- Facilitated more effective communication, negotiation, and problem-solving skills;
- Provided education about elder care resources;
- Facilitated the creation of an elder care plan
- Modified an existing elder care plan



- Assisted in the implementation of an elder care plan
- Made recommendations for resolutions
- Made decisions within the scope of a court order
- Made decisions upon the request of the parties
- Made decisions outside the scope of the order or without parties' approval

**Were there any complaints made against you as the Eldercaring Coordinator?**

Yes  No

If Yes, was a complaint made by:  Elder  Other participant

Was the complaint discussed with you as the Eldercaring Coordinator?  Yes  No

If yes, was the complaint resolved?  Yes  No

Was the complaint taken to the judge?  Yes  No

**Did you testify in this case as Eldercaring Coordinator?**  Yes  No

**If yes, were you taken off the case as the Eldercaring Coordinator?**  Yes  No

If yes, was that because:

You asked the court for discharge as this case was not amenable to the eldercaring coordination process

The court wanted to avoid a conflict of interest since you just testified

The parties requested that you be discharged as Eldercaring Coordinator

The court found fault in your performance as Eldercaring Coordinator

Was another Eldercaring Coordinator appointed?  Yes  No

The complaint was: \_\_\_\_\_

**ELDERCARING COORDINATION EXPERIENCE**

**Location of meetings (check all that apply):**

Your office  Attorney's Office  Elder's residence  Family Member's Home

Religious setting  Care facility

Other \_\_\_\_\_

**Was the location(s) comfortable?**  Yes  No

Was the location(s) convenient for participants?  Yes  No

Was there adequate parking or other transportation options?  Yes  No

Were you, as the Eldercaring Coordinator, attuned to the elder's need for physical comfort?

Yes  No

Were you, as the Eldercaring Coordinator, fully attuned to the physical needs of the elder and the other participants during the meetings?  Yes  No

**What accommodations were provided to the elder?**  Ramp or elevator

Printed materials with larger writing  Handrails in bathroom  Wheelchair/walker accessibility  Wide chairs  Snacks/beverage  Comfortable room temperature

Interpreter  Printed materials in a language other than English

Assisted listening device  Other: \_\_\_\_\_

**What physical accommodations were provided for the other participants?**

Ramp or elevator  Printed materials with larger writing  Handrails in bathroom

Wheelchair/walker accessibility  Wide chairs  Snacks/beverage  Comfortable room temperature  Interpreter  Printed materials in a language other than English

Assisted listening device  Other: \_\_\_\_\_

**What time of day were the meetings?**  Morning  Afternoon  Evening  Varied

**How often were meetings?**  Once a week  Alternate weeks  Once a month  
 Scheduled according to the request of participants as needed

**Did the frequency of meetings change as the eldercaring coordination process continued?**

Increased in frequency  Decreased in frequency  
 Stayed the same

**How did you communicate during the eldercaring coordination process? (Check all that apply)**  Phone  Fax  Text  Email  Skype  Video conferencing  Other

**IS THERE ANYTHING ELSE YOU WOULD LIKE US TO KNOW?**

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## APPENDIX E:

### REPRESENTATIVES OF ORGANIZATIONS COMPOSING ACR TASK FORCE ON ELDERCARE COORDINATION (Position When Representative Joined ACR Task Force)

Co-Chair Sue Bronson, LCSW, Immediate Past ACR Elder Section Co-Chair  
Association for Conflict Resolution

Co-Chair Linda Fieldstone, M.Ed., Past President  
Association for Family and Conciliation Courts

Georgia Anetzberger, President  
National Committee on the Prevention of Elder Abuse

Joan Braun, Co-Chair Elder Section  
Association of Conflict Resolution

Andrew Capehart, Assistant Director  
National Adult Protective Services Association

Christie Coates, Designee, Past President  
Association of Family and Conciliation Courts

Annice Davis-White, Designee  
National Association of Professional Geriatric Care Managers

Resa Eisen, MSW, RSW, Designee  
Alternative Dispute Resolution Institute of Canada

Amy Gourlay, Director  
Hamlin University School of Law

Julie Gray, President  
National Association of Professional Geriatric Care Managers

Trudy Gregorie, President  
National Committee on the Prevention of Elder Abuse

Kim Grier, President  
National Guardianship Association

Chris Herman, MSW, LICSW, Senior Practice Associate  
National Association of Social Workers

Sally Hurme, Project Advisor on Education and Outreach  
Association of American Retired Persons

Hon. Sandy Karlan, President  
Florida Chapter of the Association of Family and Conciliation Courts

Michael Kirtland, J.D., LL.M., CELA, Designee  
National Academy of Elder Law Attorneys

Karen Largent, Elder Section  
Association of Conflict Resolution

Sandy Markwood, Chief Executive Officer  
National Association of Area Agencies on Aging

Linda Oxford, LCSW, LMFT, Designee  
American Association for Marriage and Family Therapy

Meredith Ponder, Federal Policy and Media Coordinator  
Elder Justice Coalition

Mary Joy Quinn, President  
National Guardianship Network

Jessica Singer, J.D, Designee  
National Council of Juvenile and Family Court Judges

Matt Sullivan, Ph.D., Designee, Board of Directors  
Association of Family and Conciliation Courts

Brenda Uekert, Principle Court Research Consultant  
National Center for State Courts

Erica Wood, Assistant Director,  
American Bar Association Commission on Law and Aging

Hon. Mike Wood, President  
National College of Probate Judges

Martin Zehr, Office on Aging  
American Psychological Association

Zena Zumeta, J.D., Designee  
American Bar Association Dispute Resolution Section