



**27<sup>th</sup> Annual  
N A P S A  
CONFERENCE**



**PROTECT | PREVENT | EMPOWER**

2016

# 27<sup>th</sup> Annual NAPSA CONFERENCE



**PROTECT | PREVENT | EMPOWER**

*A conference focused on innovative strategies to protect and prevent adults from abuse, ultimately empowering them to live independently.*

August 29-31, 2016

Loews Hotel | Philadelphia, PA

*Primary Conference Partners:*

**Pennsylvania Department of Aging  
Temple University Harrisburg**

*Additional Conference Partners*

Department of Human Services • Department of Health • Department of Banking and Securities  
Department of Drug and Alcohol Programs • Pennsylvania State Police • Office of Attorney General  
Department of Revenue • Pennsylvania Lottery • Pennsylvania Commission on Crime & Delinquency



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## Greetings:

On behalf of the Department of Aging, it is my pleasure to welcome you to Pennsylvania as we host the 2016 National Adult Protective Services Association (NAPSA) Conference. In partnership with Temple University, we are thankful for NAPSA's leadership, vision, and steadfastness to be the voice of adult protective services in Washington, D.C., speaking for adult protective services and elder justice across the country.

Governor Tom Wolf and our sister-state agencies that are serving as additional conference partners (including the Pennsylvania Departments of Banking and Securities, Drug & Alcohol Programs, Health, Human Services, and Revenue, along with Pennsylvania's Commission on Crime and Delinquency, State Police, and Lottery) are committed to engaging in collaborative efforts to ensure that older Pennsylvanians at risk of abuse and neglect are served and protected.

This commitment expands resources, breaks down barriers, and strengthens relationships with strong stakeholder organizations, like NAPSA. This partnership comes at a time when elder justice has made its way to the forefront of an administration, affording Pennsylvania the opportunity to provide the platform where professional education and practice can take root and flourish in communities throughout the nation.

Your conference agenda is built around the theme: Protect - Prevent - Empower and is focused on providing innovative strategies to protect and prevent adults from abuse, neglect, and exploitation, ultimately empowering them to live independently with the dignity and respect they deserve.

As you listen and learn, reconnect with old friends, build new partnerships, and share information with your peers, we hope that you also take time to relax and enjoy Philadelphia. Delve into the history of our nation's birth in Old City. Try one of the many excellent restaurants in Center City. Take a stroll along the Schuylkill River Trail or tour the Philadelphia Museum of Art. You can go to [VisitPhilly.com](http://VisitPhilly.com) to find out more about all that this wonderful city has to offer. On behalf of Governor Wolf, we invite you to pursue your happiness while you are here.

Teresa Osborne  
Secretary of Aging



## Greetings:

As 2016 Conference Chair, it is an honor and a privilege to welcome you to the City of Philadelphia and the Commonwealth of Pennsylvania for NAPSA's 27th Annual Conference.

I want to express my deepest gratitude to NAPSA, its staff and board members for their leadership and partnership in this year's conference. My thanks also to Temple University, for their tremendous support as our co-primary sponsor. Most important, my thanks to all of you for your commitment to serve those who need it most as evidenced by your attendance at this national conference.

I know you will find this year's workshops and presentations cover the critical areas you encounter in your communities on a daily basis. In the upcoming days, you will hear from experienced presenters on important topics that cover the latest best practices and topics in the field. You will have the opportunity to connect with passionate advocates from both the public and private sectors who all share the same passion around the theme of Protect - Prevent - Empower.

Pennsylvania is known as the Keystone State and your work in advocating for the protection of the most vulnerable is the key to a safe and healthy community. While you are here please take the time to collaborate, expand your views and enhance your knowledge while taking in all the sights and opportunities Philadelphia has to offer.

I look forward to meeting all of you and please enjoy your time in Philadelphia and the Commonwealth of Pennsylvania!

Sincerely,

Dan Smedley  
Executive Assistant, Office of the Secretary  
Pennsylvania Department of Aging  
2016 NAPSA Conference Chair

# CONFERENCE SCHEDULE AT-A-GLANCE

## Monday Aug. 29

1:00 PM—1:30 PM	<i>Opening Remarks (ROOM: MILLENNIUM HALL)</i>
1:30 PM—1:45 PM	<i>Break</i>
1:45 PM—3:15 PM	<i>Workshop Sessions 1 (SEE PAGE 14 FOR ROOMS)</i>
3:15 PM—3:30 PM	<i>Break</i>
3:30 PM—5:00 PM	<i>Workshop Sessions 2 (SEE PAGE 16 FOR ROOMS)</i>
5:15 PM—6:15 PM	<i>Research Committee Networking (SPONSORED BY NCCD)</i>
6:00 PM—8:00 PM	<i>Opening Reception</i>

## Tuesday Aug. 30

8:00 AM—5:30 PM	<i>Exhibit Hall</i>
9:00 AM —10:30 AM	<i>Workshop Sessions 3 (SEE PAGE 18 FOR ROOMS)</i>
10:30 AM—10:45 AM	<i>Break</i>
10:45 AM—11:30 AM	<i>General Session 1, DEPARTMENT OF AGING SECRETARY TERESA OSBORNE (ROOM: MILLENIUM HALL)</i>
11: 30 AM—12:00 PM	<i>National Legislative Update (BILL BENSON, NAPSA &amp; BOB BLANCATO, EJC)</i>
12:00 PM—1:30 PM	<i>Lunch (ON YOUR OWN)</i>
1:30 PM—3:00 PM	<i>Workshop Sessions 4 (SEE PAGE 20 FOR ROOMS)</i>
3:00 PM—3:15 PM	<i>Break (REFRESHMENTS PROVIDED IN EXHIBIT AREA)</i>
3:15 PM—4:45 PM	<i>Workshop Sessions 5 (SEE PAGE 23 FOR ROOMS)</i>

You are invited by the NAPSA-NCPEA Research Committee to join the conversation!

## Research Committee Networking Session

Monday August 29, 2016 | 5:15 PM - 6:15 PM

Room – PSFS Room / 33<sup>rd</sup> Floor

Sponsored by



# CONFERENCE SCHEDULE AT-A-GLANCE

## Wednesday Aug. 31

8:00 AM—5:30 PM	<i>Exhibit Hall</i>
9:00 AM—10:30 AM	<i>Workshop Session 6 (SEE PAGE 24 FOR ROOMS)</i>
10:30 AM—10:45 AM	<i>Break</i>
10:45 AM—12:15 PM	<i>Workshop Session 7 (SEE PAGE 27 FOR ROOMS)</i>
12:15 PM—1:45 PM	<i>Awards Luncheon - lunch provided</i> <i>(ROOM: MILLENIUM HALL)</i>
1:45 PM—2:45 PM	<i>General Session 2, ANNAROSE INGARRA-MILCH</i> <i>(ROOM: MILLENIUM HALL)</i>
2:45 PM—3:00 PM	<i>Break (REFRESHMENTS PROVIDED IN EXHIBIT AREA)</i>
3:00 PM—4:30 PM	<i>Workshop Session 8 (SEE PAGE 29 FOR ROOMS)</i>
4:30 PM—5:30 PM	<i>Closing Remarks &amp; Basket Raffle</i>

## Attention Presenters!

A Speaker's Lounge is available for all presenters during the conference.

### Room: Lescaze / 33rd Floor

Feel free to visit the lounge any time during those days to relax and network with other presenters.

Sorry, presenters only permitted in this lounge.

## Annual NAPSA Basket Raffle

Buy some tickets and support a good cause! All proceeds go to the NAPSA Conference Scholarship Fund, which sponsors APS professionals who would otherwise not be able to attend.

\$20	<i>40 Tickets</i>
\$10	<i>15 Tickets</i>
\$5	<i>6 Tickets</i>
\$1	<i>1 Ticket</i>

## ABOUT THE NATIONAL ADULT PROTECTIVE SERVICES ASSOCIATION

The National Adult Protective Services Association (NAPSA) is a national non-profit 501(c)(3) organization with members in all fifty states. Formed in 1989, the goal of NAPSA is to provide Adult Protective Services (APS) programs a forum for sharing information, solving problems, and improving the quality of services for victims of elder and vulnerable adult mistreatment. Its mission is to strengthen the capacity of APS at the national, state, and local levels, to effectively and efficiently recognize, report, and respond to the needs of elders and adults with disabilities who are the victims of abuse, neglect, or exploitation, and to prevent such abuse whenever possible.

### NAPSA STAFF



***Kathleen Quinn***  
*Executive Director*



***Andrew Capehart***  
*Assistant Director*



***Bill Benson***  
*National Policy  
Advisor*



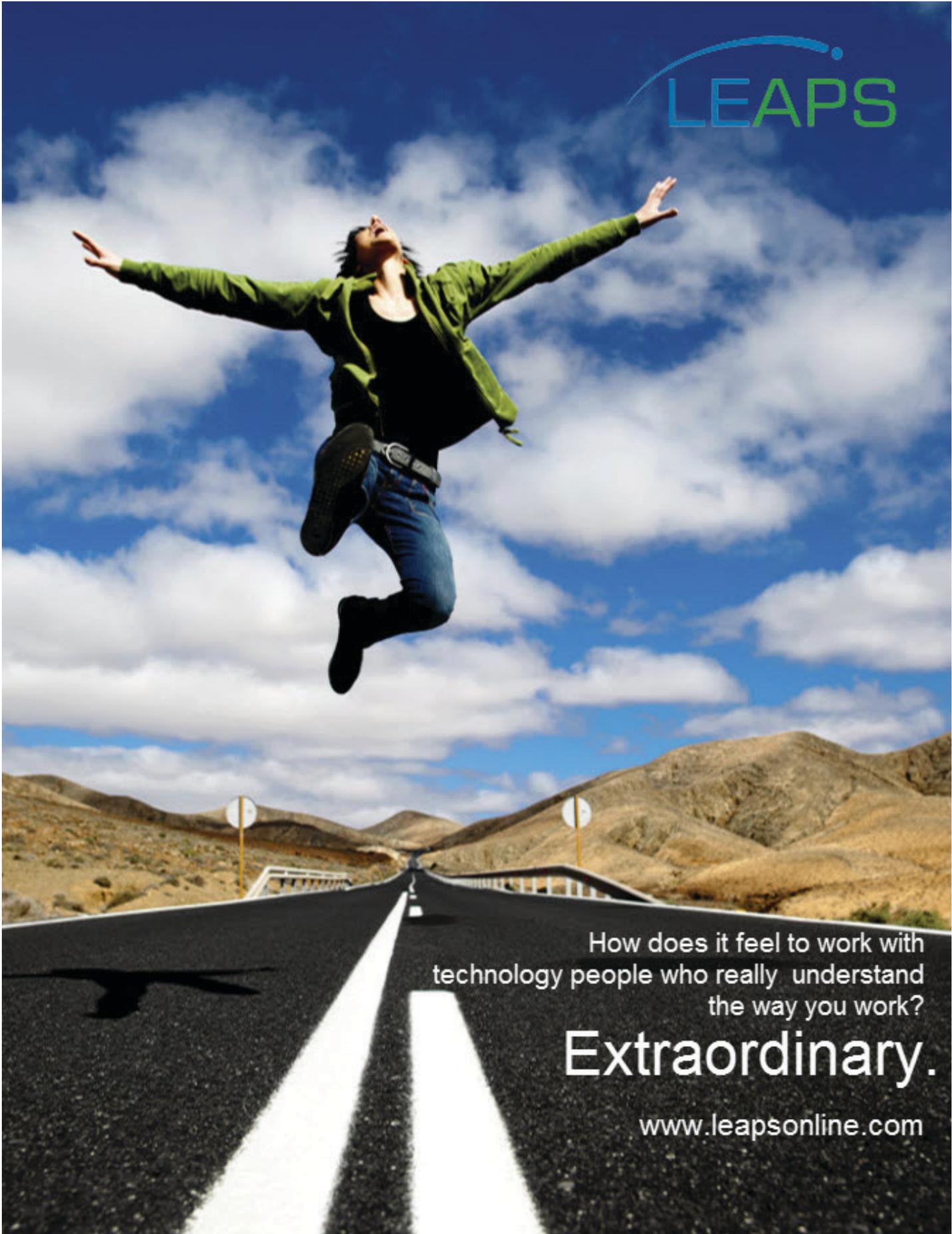
***Carol Carlton***  
*Consultant*



***Holly Ramsey***  
*Klawnsnik, PhD*  
*Director of  
Research*



***Kendra Kuehn***  
*Policy Analyst*



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**Extraordinary.**

[www.leapsonline.com](http://www.leapsonline.com)

## Choose PCA to Care for You

Philadelphia Corporation for Aging has more than 40 years of experience helping seniors get the care they need to stay in their own homes:

**Safe, secure and well cared-for.**

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**[www.pcaCares.org](http://www.pcaCares.org)**



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## PeerPlace provides best-in-class data management software for human service agencies and organizations

PeerPlace provides data management software for the health and human services industry. Our “No Wrong Door” framework enables coordinated care planning across community-based agencies. Now you can connect community resources with consumer needs to foster continuity of care and maximize the delivery of community-based services.

With a cloud-based Software as a Service (SaaS) model, PeerPlace manages the entire lifecycle of care management services while helping maintain funding compliance. PeerPlace software solutions automate real life

business processes and workflow that allows our customers to do what they do best...care for their consumers, clients and patients. Our software scales to meet the needs of statewide, regional and local system requirements.

We are ready to support your data management needs. Please contact us to schedule a demonstration and learn more about how PeerPlace can support your state and local system requirements to manage the delivery of community-based services.

350 Linden Oaks • Suite 215 • Rochester • NY • 14625  
[info@peerplace.com](mailto:info@peerplace.com) • 1-800-824-9180



Liberty Healthcare Corporation warmly welcomes our colleagues to Philadelphia for the 27th Annual NAPSA Conference

Liberty is the Pennsylvania Department of Human Services statewide contractor for Adult Proective Services

**Please stop by and visit us at Exhibit #12**

**For more information, please contact:**

Rick Robinson  
 Executive Vice President  
[rick.robinson@libertyhealth.com](mailto:rick.robinson@libertyhealth.com)

Charlie Sproule  
 Vice President, Operations  
[charlie.sproule@libertyhealth.com](mailto:charlie.sproule@libertyhealth.com)

**Or call us at 610.668.8800**

Liberty Healthcare Corporation | 401 E. City Avenue – Suite 820 | Bala Cynwyd, PA 19004  
[www.LibertyHealthcare.com](http://www.LibertyHealthcare.com) | (610) 668-8800 | Toll-Free (800) 331-7122



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*To learn more, please visit our booth located in the exhibit hall or [guardianshipcert.org](http://guardianshipcert.org).*

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## The 27th Annual NAPSA Conference

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A toll-free number that senior investors can call to get assistance from the Financial Industry Regulatory Authority (FINRA) or raise concerns about issues with brokerage accounts and investments.

**Call 844-57-HELPS  
(844-574-3577)**

**Monday-Friday, 9 am-5 pm Eastern**

Learn more and access other helpful resources at [www.finra.org](http://www.finra.org).



You are invited by the NAPSA-NCPEA Research Committee to join the conversation!

## Research Committee Networking Session

**Monday August 29, 2016 | 5:15 PM - 6:15 PM**

**Room – PSFS Room / 33<sup>rd</sup> Floor**

**Sponsored by**



**National Council on  
Crime & Delinquency**

## Support NAPSA on Amazon Smile!

0.5% of purchases will be donated to NAPSA

<http://smile.amazon.com/ch/30-0044497>



## MEMBERSHIP AT NAPSA

NAPSA welcomes all current and former Adult Protective Service (APS) agencies, institutions, workers, and all supporters—any person or agency with an interest in APS and/or elders and adults with disabilities who are victims of abuse, exploitation and/or neglect.

More information available at [www.napsa-now.org/join](http://www.napsa-now.org/join).

Member benefits include:

Conference Registration Discount • Monthly Newsletter  
[Member Listserv](#) • [Networking Opportunities](#)

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## 27<sup>th</sup> ANNUAL NATIONAL ADULT PROTECTIVE SERVICES ASSOCIATION ANNUAL CONFERENCE WELCOME RECEPTION

Monday, Aug. 29, 2016

6:00 PM - 8:00 PM

Ballroom D | Loews Hotel | Philadelphia, PA

Light Appetizers | Cash Bar | Music

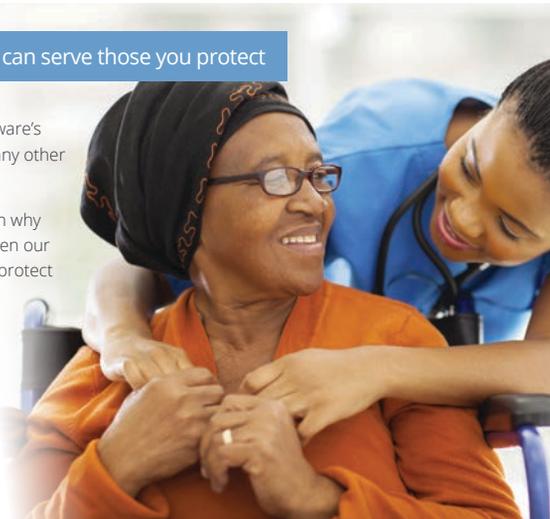
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**Mediware** - so you can serve those you protect

More states rely on Mediware's **Harmony for APS** than any other system.

Stop by our booth to learn why so many states have chosen our software solution to help protect vulnerable adults, achieve desired outcomes and align with National Adult Protective Services Data System requirements.

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**Thank You  
NAPSA Members  
For  
Being There!**



**Stop by Our Booth**

To Learn More about  
What We Do  
and to Register to Win  
Temple University Prizes

**[harrisburg.temple.edu](http://harrisburg.temple.edu)**

**WORKSHOP SESSIONS 1**  
**MONDAY AUGUST 29, 2016**  
**1:45 PM - 3:15 PM**

**101 - Government That Works**

*WASHINGTON A (3rd FLOOR)*

*Teresa Osborne, PA Department of Aging*

*Robin Wiessmann, PA Department of Banking and Securities*

*Christina Kotsalos, PA Department of Banking and Securities*

*Denise Getgen, PA Department of Aging*

*Don Blandin, Investor Protection Trust*

This session focuses on how the PA Department of Aging and PA Department of Banking and Securities are joining forces to combat elder financial exploitation by educating financial, legal and medical professionals on how to identify the red flags of fraud and abuse. The session will feature welcoming remarks from Secretary of Aging Teresa Osborne, and overview of the Department on Aging goals along with information regarding financial abuse prevention. Secretary Robin Weissmann will provide a background on the Department of Banking and Securities. Speakers will talk about the state plan for these issues and how the Department of Aging and Department of Banking & Securities work together. The EIFFE and Senior\$afe trainings will also be highlighted.

**102 - Supported Decision Making**

*WASHINGTON B (3rd FLOOR)*

*Darcy Elks, MA, Consultant*

Just like everyone else, the people we serve have to make many decisions about their lives, their relationships, their financial situations, their health, their employment and their spirituality. Our role is to support people to make the best decisions based on good information and balancing all the (sometimes) competing considerations such as safety versus autonomy, self-determination versus exploitation. This workshop will cover many of the important considerations we need to be aware of if we are to provide the best possible support for people making important decisions. This may mean not being involved at all to trying to influence a decision as constructively as possible. Topics to be covered include: 1. What is supported decision making? 2. Why is supported decision making so important for the people we serve? 3. What potential roles may we play in supporting people to make informed decisions? 5. Potential dilemmas in our support of

decision making

**103 - Trafficking of At-Risk Adults**

*WASHINGTON C (3rd FLOOR)*

*Pat S. King, RN, GA Division of Aging Services*

*Heather Strickland, GA Bureau of Investigation*

There are many names used to describe an emerging criminal activity, namely predators targeting adults with physical and intellectual disabilities, chronic and persistent mental illness and older adults for the sole purpose of gaining access to the adults' monthly checks and perpetrating other types of theft and fraud. Some of the names used include unlicensed care homes, hybrid human trafficking, racketeering enterprises, false Imprisonment, neglect and exploitation of older adults and adults with disabilities, and preying on at-risk adults for monthly benefits. The funds most often targeted are Social Security, Supplemental Nutritional Assistance Program (food stamps) and Veterans' Benefits. While residents live in squalor and suffer horrific abuse, neglect & exploitation (financial, sexual, forced labor, etc.), owners/operators drive luxury vehicles, take vacations, play the lottery – all on funds belonging to the residents. This presentation will present an overview of this emerging crime trend and the efforts GA is taking to further the identification of the offenders, address the needs of the victims and build strong cases for the prosecution.

**104 - Undoing Undue Influence:  
A Screening Tool for APS Practitioners**

*COMMONWEALTH A (2nd FLOOR)*

*Mary Joy Quinn, R.N., M.A., M.F.T., Director (ret.)  
Probate, San Francisco Superior Court*

Using unfair tactics or undue influence to get vulnerable people to do things they wouldn't otherwise do is a familiar scenario to those in the field of elder abuse. This workshop describes a 2015-16 project that developed an undue influence screening tool for APS line personnel with the assistance of APS personnel and experts in the field of elder abuse and which is applicable to other professions and community practitioners. The screening tool is an outgrowth of a 2010 project ([www.courts.ca.gov/documents/UndueInfluence.pdf](http://www.courts.ca.gov/documents/UndueInfluence.pdf)) Which explored the subject of undue influence from several perspectives and was instrumental in the change of the definition of undue influence in California law. Participants will have the opportunity to complete the screening tool using a case study.

## 105 - Utilizing a Standard Form for APS to Request Financial Records

*COMMONWEALTH B (2nd FLOOR)*

*Joseph Snyder, Philadelphia Corporation for Aging*

The Philadelphia Corporation for Aging and NAPSA, through a grant from the Huguette Clark Family Fund for Protection of Elders, developed a standard records request form for APS to use throughout the country. We have revised the form based on input from around the country from APS programs and the American Bankers Association. We have also developed an introductory letter for APS to send to local banks, and a letter you can use when a bank refuses to release records. The forms will be presented and discussed at the workshop. The history of the project as well as the history of working with financial institutions will be featured.

## 106 - The Role of Race, Ethnicity & Place in Assessing Risk: Bridging the Gap from Research to Policy & Practice (Part 1)

*COMMONWEALTH C (2nd FLOOR)*

*Jacque Gray, PhD, University of North Dakota*  
*Meies Matz, MPH, Oregon Office of Adult Abuse Prevention & Investigations*  
*Scott Beach, PhD, University of Pittsburgh*  
*Sharon Baggett, PhD, University of Indianapolis-Center for Aging and Community*

In the U.S., roughly one third of all adults with disabilities are between the ages of 45-64 years, meaning there are intersects between the aged and disabled in the challenges they face, such as higher rates of poverty, social isolation, and other social determinants that can make it more difficult for them to access services (Centers for Disease Control and Prevention, 2013). These challenges are further compounded by sociocultural differences, and as we gain a better understanding that “age cohort alone” (Martin, et al., 2014) is an inadequate indicator of quality of life, and that our aggregate statistics obscure the real time needs of diverse populations, we are finding that current practice may inadvertently undermine future reporting or mitigate the effectiveness of APS interventions. Increasingly, many APS programs and their partners are changing this paradigm by collaborating across systems, programs, and researcher in analyzing literature and data in order to create culturally responsive intervention and assistance to their disabled and/or minority populations served. Session I: Panel of experts will discuss their research regarding working with diverse populations and effective ways that research can support program practice that both increase safety and respect

cultural/ethnic needs of the families served. Session II: Discussion of effective ways to penetrate vulnerable populations, and how abuse exposure across the lifespan, ability status, race, ethnicity and place can effect victim’s attitude and actions towards acknowledging and addressing abuse.

## 107 - Senior Crime Prevention University: Scams and Frauds 101/ Adult Bullying 101 (Part 1)

*COMMONWEALTH D (2nd FLOOR)*

*Agent Janene Holter, PA Office of Attorney General*

These programs are geared toward educating older Pennsylvanians and their families throughout the Commonwealth on crime prevention, the threat of fraud as well as the growing problem of adult bullying. Our goal is to make Pennsylvania’s adult population aware of these concerns, define these issues, and provide them with resources and to teach them how to avoid becoming a victim. These presentations will give the audience the tools necessary to make informed decisions in order to better protect their families from these devastating issues. Topics that will be cover regarding scams and frauds: Charities, lotteries, estate planning, home improvements, checks & money orders, power of attorney issues, and financial institutions. Topics that will be covered in Adult Bullying 101: defining bullying, explain types of bullying, examples of bullying issues, why bullying may be happening, ways to stop and report bullying. These programs are offered throughout the Commonwealth of Pennsylvania free of charge to anyone who requests a presenter.

## 108 - Personal Safety on the Job (Part 1)

*CONGRESS A (4th FLOOR)*

*Dan Elliot, Dan Elliot LLC*

This workshop will provide participants with skills in risk assessment and interpersonal safety as it applies to professional life. Upon completion, participants will be able to assess threatening or dangerous situations and environments, recognize more choices in dealing with challenging situations, and use communication strategies that de-escalate threatening, hostile, or angry people. This training is valuable to workers who have contact with clients or family members who may become upset or emotionally charged. While the focus is on those who deliver direct service to vulnerable adults, the skills acquired in this training apply to anytime someone is in contact with anyone, either in professional or personal life. Using humor and practical experience, Dan describes why people be-

have the way they do and demonstrates what can be done to build rapport or de-escalate a challenging encounter. Dan's objective is to promote productive and safe interactions with clients and others workers may have contact with.

## **WORKSHOP SESSIONS 2**

### **MONDAY AUGUST 29, 2016**

#### **3:30 PM - 5:00 PM**

### **201 - Mobile Apps for the Community and Law Enforcement to Assist Vulnerable Adults**

*WASHINGTON A (3rd FLOOR)*  
**David Cardell, EyeOn App LLC**  
**Sharee Rines, Georgia APS**

Details and discussion around mobile apps that the state of Georgia has deployed to the community and Law Enforcement. It will focus on what tools have been provided to Law Enforcement in the form of a mobile app to better help them identify and assist victims of abuse, neglect, exploitation, or cognitive decline. We will dive into the functionality of the app, discuss how the app is being distributed, and feedback from Law Enforcement. There will also be an opportunity to discuss what changes or customization would be needed for other states.

### **202 - Scams and Fraud Targeting Senior Citizens and the Role of Law Enforcement**

*WASHINGTON B (3rd FLOOR)*  
**Adam Reed, Pennsylvania State Police**

The latest scams and fraud that target seniors will be discussed. Law enforcement has many roles dealing with these crimes, including detection, investigation, and prevention. Each of these roles will be discussed further in order to provide the law enforcement point of view on the issue.

### **203 - Collaborating and Training Across the Spectrum**

*WASHINGTON C (3rd FLOOR)*  
**Jennifer Edwards-Hawkins, Disabled Persons Protection Commission (DPPC)**  
**Anne Monti, Building Partnerships Initiative (BPI)**

This workshop introduces and demonstrates the numerous training products and curricula used by Massachusetts Disabled Persons Protection Commission to cross train professionals and persons with disabilities on effectively

recognizing, reporting and responding to abuse. Workshop includes participation in various interactive and enlightening activities designed to assist learning. Through examination and discussion of these training materials, participants will acquire the necessary understanding to create their own materials. Materials shown will be available to participants.

### **204 - Elder Justice Reform Efforts in Pennsylvania**

*COMMONWEALTH A (2nd FLOOR)*  
**Cherstin Hamel, Office of Elder Justice in the Courts Judge Paula Francisco Ott, Superior Court of Pennsylvania**  
**Zygmunt A. Pines, Esq.**  
**Secretary of Aging Teresa Osborne, PA Dept. of Aging**

This workshop will highlight elder justice reform efforts in Pennsylvania, with a particular focus on the steps the state is taking to help recognize, report and respond to elder abuse in its various forms (e.g., physical, psychological, financial).

### **205 - State Securities Regulators: Initiatives to Combat Elder Financial Abuse**

*COMMONWEALTH B (2nd FLOOR)*  
**Judith Shaw, Administrator, Maine Securities Administrator and NASAA President, Maine Office of Securities**  
**Joseph Brady, Executive Director, North American Securities Administrators Association**

This workshop will cover the investor protection functions carried out by state securities regulators, the closest regulators to the investing public, throughout the United States, with an emphasis on senior investor protection. The workshop will provide attendees with an understanding of the resources state securities regulators can provide to Adult Protective Services agencies to help protect seniors and vulnerable adults from financial abuse. The workshop also will outline NASAA's seniors initiatives, including its model act to protect seniors and vulnerable adults from financial exploitation, best practices for the financial industry when working with senior clients, and outreach efforts. These efforts include the Serve Our Seniors website, a clearinghouse of resources for caregivers, regulators and investors, and Senior\$afe, an innovative training for broker-dealers and investment advisers based on the successful Senior\$afe program for credit union and bank

tellers developed by the Maine Council on Elder Abuse Prevention.

## 206 - The Role of Race, Ethnicity & Place in Assessing Risk: Bridging the Gap from Research to Policy & Practice (Part 2)

*COMMONWEALTH C (2nd FLOOR)*

**Jacque Gray, PhD, University of North Dakota**  
**Meies Matz, MPH, Oregon Office of Adult Abuse Prevention & Investigations**  
**Scott Beach PhD, University of Pittsburg**  
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In the U.S., roughly one third of all adults with disabilities are between the ages of 45–64 years, meaning there are intersects between the aged and disabled in the challenges they face, such as higher rates of poverty, social isolation, and other social determinants that can make it more difficult for them to access services (Centers for Disease Control and Prevention, 2013). These challenges are further compounded by sociocultural differences, and as we gain a better understanding that “age cohort alone” (Martin, et al., 2014) is an inadequate indicator of quality of life, and that our aggregate statistics obscure the real time needs of diverse populations, we are finding that current practice may inadvertently undermine future reporting or mitigate the effectiveness of APS interventions. Increasingly, many APS programs and their partners are changing this paradigm by collaborating across systems, programs, and researcher in analyzing literature and data in order to create culturally responsive intervention and assistance to their disabled and/or minority populations served. Session I: Panel of experts will discuss their research regarding working with diverse populations and effective ways that research can support program practice that both increase safety and respect cultural/ethnic needs of the families served. Session II: Discussion of effective ways to penetrate vulnerable populations, and how abuse exposure across the lifespan, ability status, race, ethnicity and place can effect victim’s attitude and actions towards acknowledging and addressing abuse.

## 207 - Senior Crime Prevention University: Scams and Frauds 102/Adult Bullying 102 (Part 2)

*COMMONWEALTH D (2nd FLOOR)*

**Agent Janene Holter, PA Office of Attorney General**  
**David Shallcross, PA Office of Attorney General**

These programs are geared toward educating older Pennsylvanians and their families throughout the

Commonwealth on crime prevention, the threat of fraud as well as the growing problem of adult bullying. Our goal is to make Pennsylvania’s adult population aware of these concerns, define these issues, and provide them with resources and to teach them how to avoid becoming a victim. These presentations will give the audience the tools necessary to make informed decisions in order to better protect their families from these devastating issues. Topics that will be cover regarding scams and frauds: Charities, lotteries, estate planning, home improvements, checks & money orders, power of attorney issues, and financial institutions. Topics that will be covered in Adult Bullying 101: defining bullying, explain types of bullying, examples of bullying issues, why bullying may be happening, ways to stop and report bullying. These programs are offered throughout the Commonwealth of Pennsylvania free of charge to anyone who requests a presenter.

## 208 - Personal Safety on the Job (Part 2)

*CONGRESS A (4th FLOOR)*

**Dan Elliot, Dan Elliot LLC**

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## 209 - Professional Communication Y’all

*HOWE (33rd FLOOR)*

**Steve Field**

The NAPSA Profession Communication module is only one of 23 Core Training Modules Available through NAPSA/MASTER. In this workshop we will explore portions of this 7 hour in-class training with you. In this fun and interactive workshop participants will learn the value of “Professional Communication

Y'all" and how APS Training of all kind can be and should be an interactive experience. Two experienced APS trainers from different states will demonstrate the adaptability and availability of this workshop on APS "Professional Communication" for your state, and show you how you can access this and the other 22 APS Core Competency Training Modules; a wealth of information and training material, for Free. This workshop will be short on lecture and long on discussion, demonstration and interactive exercises. In doing so participants will participate in the demonstration of some basic interviewing skills, question typologies, and special considerations when interviewing victims with various types of limitations and at the same time if you are looking for a way to effectively provide quality training for your APS staff and not have to create it yourself, you will learn how to access this training and more for free.

### **WORKSHOP SESSIONS 3 TUESDAY AUGUST 30, 2016 9:00 AM - 10:30 AM**

#### **301 - Are We Ready for Trauma-Informed Care in APS?**

*WASHINGTON A (3rd FLOOR)*  
**Colleen Beach, Monmouth University**

The recent draft of the ACL's Voluntary Consensus Guidelines for APS included a reference to integration of trauma-informed approaches into a multi-disciplinary system that serves older adults and adults with disabilities (Draft Voluntary Consensus Guidelines for State Adult Protective Services Systems, 2015). Many of us are now seeking more information about what trauma-informed care is and what this approach may mean in the context of APS. This workshop will offer an introduction to what it is all about, and offer some resources and preliminary steps to evaluate if your system is ready to become trauma-informed.

#### **302 - Critical factors in addressing elder abuse in Asian American and Pacific Islander communities**

*WASHINGTON B (3rd FLOOR)*  
**Eun Jeong Lee, National Asian Pacific Center on Aging**  
**Ga-Young Choi, University of Northern Iowa, Department of Social Work**  
**Eun Koh, The Catholic University of America, National Catholic School of Social Service**

This session highlights challenges for both aging

professionals and American and Pacific Islander (AAPI) elders when addressing elder abuse. The workshop will begin with exploring common myths and realities of elder abuse in AAPI communities, including social and cultural values and differences from other minority groups. The workshop will also present pilot research findings regarding elder mistreatment among immigrant AAPI elders with limited English proficiency who reside in low-income households. The research participants were recruited from National Asian Pacific Center on Aging (NAPCA)'s Senior Community Service Employment Program (SCSEP). The pilot study focused on their experiences, perceptions, and help-seeking behaviors of elder abuse. Particularly, the presentation will highlight the findings on study participants' knowledge and perception of Adult Protective Service (APS). Based on these findings, presenters will identify critical factors that aging service providers need to consider in order to prevent and address elder abuse, and make suggestions for the effective use of APS in AAPI communities that will help to provide competent and linguistically appropriate services. The workshop attendees will be invited to share their experiences in serving AAPI and/or other minority elders and discuss how aging service providers can build a foundation to prevent and address elder abuse in AAPI communities.

#### **303 - Protecting the Health and Welfare of Long Term Services and Support Population.**

*WASHINGTON C (3rd FLOOR)*  
**Beth Engelking, Texas Department of Family & Protective Services- Adult Protective Services**  
**Kezeli A. Wold, Texas Department of Family & Protective Services**

The Centers for Medicare and Medicaid Services (CMS) allow states to apply for waivers in order to provide long term services and supports (LTSS) in a home or community setting instead of an institutional setting. States must assure CMS that necessary safeguards are taken to protect the health and welfare of individuals receiving HCBS. This workshop will highlight the work Texas APS has completed to prevent, identify, report, investigate, and remediate critical incidents that occur within the delivery of long-term services and supports as well as to track and trend results in order to make system improvements.

### 304 - Validity and Reliability: Important Elements of Any APS Assessment Tool

*COMMONWEALTH A (2nd FLOOR)*

*Julie Davis, National Council on Crime and Delinquency*

*Susan Gramling, National Council on Crime and Delinquency*

Assessment tools must be evaluated against certain criteria to ensure they function appropriately and that decision makers are likely to “get it right.” Validity and reliability are two of the most important criteria. Validity refers to how well the assessment measures what it intends to measure. Reliability indicates how often different people using the same information and the same assessment tool come up with the same answer. This presentation will provide participants with examples of research methodologies that determine validity and reliability of assessments used in the Structured Decision Making® model. These examples include risk fit studies, the value and use of inter-rater reliability (IRR) tests, and process evaluation methods. The presentation will demonstrate how jurisdictions using site-specific research methodologies can verify that their tools are measuring what they should. In addition, the presentation will demonstrate how IRR leads to increased consistency of practice. Data resulting from these methods can inform leaders about tool functionality and opportunities for system and practice improvement.

### 305 - Identifying Drug Diversion and How it Impacts Vulnerable Adults

*COMMONWEALTH B (2nd FLOOR)*

*Lori Knockstead, Institute on Protective Services at Temple University Harrisburg*

Theft of prescription medications is a growing problem. Drug diversion in care facilities is prevalent and too often not identified. Vulnerable adults that depend on caregivers for medication administration are placed at risk when their medications are diverted. This session will provide an overview of the concept and prevalence of drug diversion. A review of the typical ways drugs are misused and diverted will be explored. Investigative steps and actions for protective service investigators will be examined. Roles of responding agencies and law enforcement will be discussed.

### 306 - APS Moving Forward!! 11 Innovative Projects Across the Nation Working to Make a Difference

*COMMONWEALTH C (2nd FLOOR)*

*Nancy A. Alterio, Disabled Persons Protection Commission*

*Tonia Bell, Alabama Department of Human Resources*

*Kathleen Calderon, APS State of Colorado*

*Aiesha Gurley, Administration for Community Living*

Almost one year ago the Administration on Community Living (ACL) announced that it awarded the first-ever federal grants to eleven states to advance the efforts of Adult Protective Services (APS). These two-year grants were awarded to Alabama, Colorado, the District of Columbia, Illinois, Iowa, Massachusetts, New York, Oklahoma, Pennsylvania, Virginia, and Washington. Learn about the many innovative and promising practices occurring throughout the nation to address the many gaps and challenges experienced by APS to respond to the complex issues of abuse committed against older adults and adults with disabilities through a panel presentation including but not limited to: Alabama’s efforts to document successful outcomes for APS consumers data collection and tracking capabilities consistent with National Adult Maltreatment Reporting System (NAMRS); Colorado’s work to increase positive outcomes for at-risk adults in need of protective services by focusing resources on at-risk adults being mistreated and providing those adults with optimal services to improve safety and reduce risk; Iowa’s effort to maximize positive outcomes for dependent adults by protecting well-being, empowering independence, and supporting quality of life; Massachusetts’ multidisciplinary approach to improve the overall experiences, health, well-being, and outcomes of sexual assault victims with developmental disabilities; New York’s new approaches to investigating financial exploitation of vulnerable adults; and Washington’s effort to decrease the risk of fatality/near fatality incidents of persons utilizing Adult Protection Services (APS); Join the seasoned panel in an informative discussion on what states have done and hope to do to improve APS reporting, risk assessment, investigation, responses, practices, services, data collection and health and well-being of victims/survivors who are older or have a disability.

### 307 - Is this a Crime? Practices for Identification & Investigation of Abuse of Persons with Disabilities

*COMMONWEALTH D (2nd FLOOR)*

*Timothy F.X. Grant, MA State Police Detective Unit*

*Elizabeth Dunphy Farris, Legal Counsel, Hampden District Attorney’s Office*

*Elizabeth D. Scheibel, Northwestern District Attorney (ret.), Building Partnerships Initiative*

Is this a Crime? Allies in the Good Fight - Effective Practices for the Identification, Report and Investigation of Abuse Committed Against Persons with Disabilities, introduces participants, with the use of case studies, to a multidisciplinary approach to the identification, report and investigation of crimes committed against persons with disabilities so that key decisions can be made regarding victim safety and evidence preservation at the critical stages in the aftermath of a crime. When working together, abuse committed against persons with disabilities can be successfully recognized, reported, investigated and prosecuted. No one person or agency possesses all of the skill, knowledge and resources necessary to respond to the complex problems of abuse or crimes committed against persons with disabilities. Each law enforcement, human services or medical professional brings a different perspective and different information to the case investigation. Strategies to employ when interviewing alleged perpetrators and victims, preserving and collecting evidence and making a case for prosecution in the criminal justice system will be reviewed.

### **308 - Collaborating to Reduce the Incidence of Abuse, Neglect and Exploitation**

*CONGRESS A (4th FLOOR)*

**Sheryl Soukup, Soukup Strategic Solutions**  
**Robert Anderson, APS Director, Florida Department of Children and Families**

State agencies, non profits and self-advocates are teaming up in Florida to reduce the incidence of abuse, neglect and exploitation of individuals with developmental disabilities across the state. Collaborative efforts have resulted in data sharing, cross-agency data analysis, a public awareness campaign, policy work and enhanced training for law enforcement, service providers and individuals with disabilities. In this presentation, attendees will learn how a statewide task force of stakeholders is changing the way Florida detects, responds to and prevents maltreatment of individuals with developmental disabilities.

**WORKSHOP SESSIONS 4**  
**TUESDAY AUGUST 30, 2016**  
**1:30 PM - 3:00 PM**

### **401 - Safeguarding the Dementia Journey (Part 1)**

*WASHINGTON A (3rd FLOOR)*

**Krista McKay, Alzheimer's Association**

Safeguarding the Dementia Journey takes a look at the epidemic of Alzheimer's in the community, its impact on the individual, family and society, and addresses specifically the concerns most connected to this vulnerable population: Aging safely in the home, understanding and addressing wandering and other behaviors, protecting the emotional, financial and physical health of both the person with dementia and his/her caregiver.

### **402 - Clinical Aspects of Supervising APS Practice**

*WASHINGTON B (3rd FLOOR)*

**Holly Ramsey-Klawnsnik, Ph.D., NAPSA**

Supervisors face multiple challenges in helping to insure the smooth operation of their APS program and that clients are effectively served. This session will address the clinical aspects of APS supervision, specifically, (1) guiding workers as they gather, analyze, and apply information regarding client safety and functioning in order to conduct thorough investigations, and (2) overseeing the development and implementation of effective intervention plans for clients deemed at-risk. We will address evaluating worker capabilities and mentoring tips to facilitate worker development along with supervisory tools and techniques. Suggestions will be provided for helping workers to avoid either under- or over-using supervision. Supervisors are encouraged to bring issues to the session that they would like to discuss.

### **403 - Collaborative Response to Violence Against Women in Later Life**

*WASHINGTON C (3rd FLOOR)*

**Natalie Novotny-Goles, PA Commission on Crime and Delinquency**

**Mr. Sam Bellich, Chief Executive Officer of the Mercer County, Pennsylvania Area Agency on Aging**  
**Ms. Lizette Olsen, Executive Director of AW/ARE, Inc. - Mercer County Pennsylvania's dual Domestic Violence/Sexual Assault Agency**  
**Mr. Chuck Danfield, Supervisor of Older Adult Protective Services in Bucks County, Pennsylvania**  
**Ms. Sandy Carvin, Victim Advocate for Senior Victims of Crime at the Network of Victim Assistance (NOVA) in Bucks County Pennsylvania**

The general view of society is that domestic violence and sexual assault are crimes that occur primarily among the young. Professionals working

in the victim advocacy, protective service and allied stakeholder fields know that interpersonal violence occurs across the lifespan. As the demographic makeup of our population shifts to include increasing numbers of individuals over the age of 60, it is critical that communities come together to address domestic and sexual violence crimes committed against and among the elder population. Pennsylvania is the fourth “oldest” state in the nation.. This panel discussion will feature insights and lessons learned by several Pennsylvania counties who formed collaborative teams between victim services, aging services and the criminal justice system to address the needs of elder victims of domestic and sexual violence.

#### **404 - APS Fatalities & Near Fatalities-The Washington State Quality Assurance Approach**

*COMMONWEALTH A (2nd FLOOR)*

**Carol Sloan, B.A., State of Washington-Department of Social & Health Services-Aging & Long Term Services Administration**  
**Shawn Matthews, B.A., State of Washington-Department of Social & Health Services-Aging & Long Term Services Administration**

This workshop will provide information regarding Washington state’s experience with the APS Fatality Review process beginning in 2010 with the incorporation of RCW 74.34.300 into law. Workshop participants will be provided with a review of the types of cases undergoing a fatality review, both from an audit process as well as a field request. Information will be shared regarding the application used for initiating, monitoring and tracking fatality reviews and the format used to provide yearly statistics and percentages. Workshop participants will be introduced to work on a new application process for fatality and near fatality reviews to include an expanded APS data collection system that is consistent with the national data collection efforts (NAMRS).

#### **405 - Enhancing APS Practice through the Coordinated Care Initiative**

*COMMONWEALTH B (2nd FLOOR)*

**Lisa Shiner, Riverside County Dept. of Public Social Services**  
**Jennifer Claar, Riverside County DPSS, Adult Services**

The Coordinated Care Initiative (CCI) is being piloted in different states across the country. In California, seven counties were designated to pilot the

initiative, including Riverside County. Implementation of CCI in Riverside has resulted in several opportunities that have led to the enhancement of their practice in APS. This workshop will highlight the practices that have been implemented in Riverside County and have served to further enhance the county’s capacity to promote safety, wellbeing and independence of elderly and dependent adults.

#### **406 - Criminals Diagnose Dementia Faster Than Doctors Do! Elder Financial Abuse and Dementia**

*COMMONWEALTH C (2nd FLOOR)*

**Elizabeth A. Landsverk, MD, ElderConsult Geriatric Medicine**

How dementia, especially early dementia, can affect elders and allow them to be vulnerable to financial abuse. Overview of what dementia is, how it is diagnosed, what behaviors result, what exactly is capacity and how it applies to financial elder abuse. What are typical financial frauds and scams, how do criminals ‘diagnose’ dementia so quickly & use it to fraud elders. What can family, friends and society do? What are red flags? How can families & friends create a support network to protect elders.

#### **407 - Abuse in Later Life: The Economic Barriers to Separating from the Abuser**

*COMMONWEALTH D (2nd FLOOR)*

**Dana N. Goldberg, SeniorLAW Center**  
**Keeley Frank, Center for Advocacy for Rights and Interests of the Elderly (CARIE)**  
**Tara Saunders, SeniorLAW Center**

Contrary to popular belief, younger women are not the sole victims of domestic violence, nor does abuse end suddenly with age. It affects every age group. Until recently, it seems, even many domestic violence experts and providers believed that abuse tapered off by age 50, as few older women show up at shelters, call police or access the resources of advocates. But domestic violence knows no age boundaries. Nor does it happen only to older women in nursing homes or long-term care facilities. Experts and advocates have discovered unique factors keeping older victims from seeking help, including the physical and mental health challenges associated with aging such as failing memory, various stages of dementia, hearing, vision and other physical disabilities, problems of mobility, access, struggles for autonomy and independence, isolation, and dependence on caregivers and family members for their care and survival. It is estimated that 5 million seniors experience abuse each year.

While estimates vary from only one in ten to one in fourteen domestic violence cases being reported to the authorities, these vulnerable individuals remain invisible and often suffer in silence. Domestic violence is rarely a one-time episode. Older survivors are easy prey to those who live in their homes and who support them financially. Without ensuring that victims are living away from their abusers, without ensuring that victims are free from financial manipulation by their abusers, and without ensuring additional means of financial independence and economic security, senior survivors are more likely to be dependent upon their abusers and to continue in or return to their abusive situations. This workshop will educate participants about the warning signs of abuse in later life, the legal tools available for addressing the abuse, the economic barriers which often prevent older victims from leaving the abusive situations and remedies for securing financial independence. In addition we will discuss the co-occurrence of financial exploitation with abuse and the vulnerability of elder victims of domestic violence. The workshop presenters will use case scenarios to facilitate participant discussion about barriers which may confront the elder victims, how to identify these barriers and steps the participants can take to help remove those barriers. We will utilize a power point to guide the workshop but a large portion of the workshop will involve audience participation and response to case scenarios. We will also administer a pre-test and post-test regarding knowledge of the participants. This workshop is part of a grant awarded by the Office on Violence Against Women, U.S. Department of Justice to SeniorLAW Center to assist elder victims of domestic violence in overcoming barriers to safety.

#### **408 - APS and Police Investigations: WORKING TOGETHER**

*CONGRESS A (4th FLOOR)*

**Jordan Satinsky, Montgomery County  
Police Department**

This session will be an introduction to conducting investigations with the police. The idea being that APS and law enforcement have not traditionally worked together. As a result, the elder/vulnerable adult abuse victim can be interviewed several times by different agencies. All of these agencies are seeking the same goal: to assist the victim. In Montgomery County we have pulled together law enforcement, Adult Protective Services, and the State's Attorney's Office in order to better serve our elder/vulnerable adult community. The collaboration between the members of these agencies has resulted in stronger investigations, better

prosecutions, and less re-victimization. This 90 minute session will cover an introduction to police criminal investigations and interview tactics. As well as how to work with police investigators and what to expect as the police/APS investigation continues through the criminal justice system. Participants will be provided with tips and tricks with interacting with their law enforcement counterparts. This session will be interactive and the presenter will facilitate a question and answer session.

#### **WORKSHOP SESSIONS 5 TUESDAY AUGUST 30, 2016 3:15 PM - 4:45 PM**

##### **501 - Safeguarding the Dementia Journey (Part 2)**

*WASHINGTON A (3rd FLOOR)*

**Krista McKay, Alzheimer's Association**

Safeguarding the Dementia Journey takes a look at the epidemic of Alzheimer's in the community, its impact on the individual, family and society, and addresses specifically the concerns most connected to this vulnerable population: Aging safely in the home, understanding and addressing wandering and other behaviors, protecting the emotional, financial and physical health of both the person with dementia and his/her caregiver,

##### **502 - APS I-Teams: How to Build a Coalition that Sticks**

*WASHINGTON B (3rd FLOOR)*

**Sylvia Pla-Raith, Ohio Attorney General**

Because elder abuse victims have diverse and multiple needs, it is unlikely that any single agency can provide everything required to stop the abuse, neglect and exploitation and/or prevent its reoccurrence. Most clients require services from several agencies. If services are not coordinated, clients may fall through the cracks which often results in negative outcomes. In addition, unnecessary delays in interventions can lead to victims experiencing increased frustration, trauma and intrusion in their lives. This workshop will demonstrate the value of communities developing an APS I-Team to promote well-coordinated services, reduce the need for clients to repeat the story and maximize service effectiveness. By working collaboratively, clients have increase opportunities for achieving positive outcomes and experience a lessened degree of trauma. Show

participants to sustain an I-Team with real concrete

examples of accomplishments and benefits.

### **503 - Mass Marketing Fraud Schemes: How, Why, and What to Do for Victims**

*WASHINGTON C (3rd FLOOR)*

**Rachel R. Heintz, United States Postal Inspection Service**  
**Christiana Kasian, United States Postal Inspection Service**

Mass marketing fraud schemes victimize hundreds of thousands of individuals out of millions of dollars each year! This workshop will provide attendees with a definition of mass marketing fraud and examples of how fraud schemes victimize individuals. The discussion will center on the red flags that can lead to early detection of victimization, effective ways to discuss victimization with someone who is in denial of their involvement, and suggestions for assisting an individual recover after victimization. This presentation will provide attendees with an increased awareness of how fraud schemes effectively swindle innocent people.

### **504 - Identification and Intervention in abuse, neglect and exploitation**

*COMMONWEALTH A (2nd FLOOR)*

**Jeffrey John Wood, Esquire; Senior Counsel, Pennsylvania Department of Aging**  
**Denise Getgen, RN; Protective Services Office Director, Pennsylvania Department of Aging**

The presentation, or workshop, will consist of an overview of the Pennsylvania Adult Protective Services Act (35 P.S. §10210.102) and the Pennsylvania Older Adult Protective Services Act (35 P.S. §10225.101), with emphasis on identification of neglect, abuse and financial exploitation with intervention measures through civil court actions (emergency involvement under the Acts, and through the Incapacitated Persons [20 Pa. C.S.A. §5513] or Guardianship Law and the Power of Attorney [20 Pa. C.S.A. §5604(d)] or Fiduciary Law) and criminal court actions [18 Pa. C.S.A.], with a focus on financial or fraud scams.

### **505 - Launch of the NAPSA APS Worker Certificate Program**

*COMMONWEALTH B (2nd FLOOR)*

**Kevin Bigelow-Training and Consulting**  
**Lori Delagrammatikas, California Department of Social Services**  
**Paul Needham, TCSServices**

This workshop is intended to alert attendees to NAPSA's forthcoming APS worker certification and the resources involved, as well as provide an update on the progress of the NAPSA Certification Subcommittee. The training will show how to access resources via the internet. It will highlight and demonstrate the functions that users can expect, such as information on educational and conference opportunities as well as available training. We will also discuss the NAPSA Trainer's registry and its requirements and benefits. These resources will be demonstrated and examples for use explored. Parallels with federal guidelines and long-term goals for establishing national priorities will be discussed.

### **506 - Granny's Got a Gun**

*COMMONWEALTH C (2nd FLOOR)*

**Mandy Weirich, Randolph County Housing Authority**

This workshop will explore the steps that professionals can take to improve gun safety in the homes of older adults and their families. We will leave the gun control debate at the door and talk about proactive steps that we can take to protect our clients, patients, and loved ones when there is a firearm in the home.

### **507 - SUPERVISING TO PROTECT; PREVENT & EMPOWER Are You Adventure Ready**

*COMMONWEALTH D (2nd FLOOR)*

**Thomas Kimbark, Texas Department of Family and Protective Services**

For Ultimate Protection of Vulnerable Adults in their Catchment Area Empowering Supervisors will Begin with the End in Mind. No one wants to see a vulnerable adult going without basic needs; being mistreated or repeatedly abused. As a frontline supervisor it is your duty to assure that workers under your direction have the skills necessary to recognize, evaluate and deter situations that are potentially dangerous. This session will be inclusive of training that can prepare Adult Protective Service (APS) Specialists for what they will see in the field through simulation and mentoring programs. We will discuss how to properly utilize an assessment tool to help identify hazards that present harm and barriers that increase risk and how it can point workers toward steps that can be implemented to alleviate symptoms. We will look at the heart of the matter and explore the possibilities of establishing prevention measures for situations that may not have risen to the defined of abuse or neglect where a seasoned supervisor may be able to guide a novice worker to avert the inevitable. We

will look at developing community partnerships in an effort to open communication and outline the importance of front line worker involvement with these collaborative efforts. And finally we will review recruitment opportunities and how the APS Specialist can be effectively used as a marketing representative to attract new persons to our workforce.

## 508 - Administration for Community Living: Supporting APS at the Federal Level

*CONGRESS A (4th FLOOR)*

**Stephanie Eliason, ACL, Office of Elder Justice & APS**  
**Karl Urban, WRMA, Inc**

In October 2014, the Administration on Community Living (ACL) established a new office as the 1st federal home for APS: the Office of Elder Justice and Adult Protective Services. Over the past 2 years, ACL has launched a number of efforts to directly support APS, both through policy and funding. This presentation will provide an overview these activities, including the National Voluntary Consensus Guidelines for State APS Administrative Systems, the National Adult Maltreatment Reporting System, grants to enhance state APS programs, and the National Adult Protective Services Technical Assistance Resource Center (APS TARC) which is supporting ACL in these efforts. In this session, staff from ACL and the APS TARC will outline ACL's vision and goals for its APS activities, and engage participants in a listening session to solicit input on how ACL and the APS TARC can further enhance its work to support APS programs.

## WORKSHOP SESSIONS 6 WEDNESDAY AUGUST 31, 2016 9:00 AM - 10:30 AM

### 601 - Supporting Senior Victims Through a Coordinated Response: Aligning Medical Policies and Practices

*WASHINGTON A (3rd FLOOR)*

**Katie Midgley, M.S., Plough Foundation**  
**Ferrell Moore, Baptist Memorial Healthcare Memphis**  
**Laura Riker, MSW, Baptist Memorial Healthcare Memphis**

Estimates suggest that as many as 1 in 5 Americans will be victims of abuse in later life. Moreover, many forms of elder abuse remain hidden from existing safeguards. This workshop focuses on one community's response. In 2014, the Plough Foundation (a private Memphis-based grant-making institution) launched a 3-year \$3.45 million

Coordinated Response to Elder Abuse (CREA). CREA links together public and nonprofit organizations responding to elder abuse. In a little over a year, CREA has served 220 senior abuse victims. Vital to this effort is the development of an elder abuse curriculum designed by Baptist Memorial Health Care nurses and social workers –with assistance from the National Center on Elder Abuse – and made possible by the Plough Foundation's CREA grant. The training is designed to help medical personnel differentiate between normal signs of aging and signs of abuse, and establishes a best-practice protocol for interviewing and flagging patients as possible victims of elder abuse. The training will be implemented across the Baptist Memorial Health Care system, supporting the early identification and intervention in elder abuse. The workshop will review the development of CREA, the process of designing and implementing the elder abuse curriculum, and discuss lessons learned as well as offering a glimpse of early outcomes.

### 602 - Innovation in Motion- The Cuyahoga County Emergency Intervention Team

*WASHINGTON B (3rd FLOOR)*

**Natasha Pietrocola, MEd, MBA, Cuyahoga County Division of Senior and Adult Services**

This workshop explore how Cuyahoga County utilized grant funding to develop an innovative program called the Emergency Intervention Team (EIT). The EIT addresses the lack of systemic collaboration between medical providers and specific services for victims of adult abuse and those who are at risk of maltreatment. It take a holistic, wrap around philosophy to assist vulnerable clients that require medical screening and a geriatric assessment, but are not capable of arranging for this care on his/her own, do not have regular health care or lack insurance to obtain these services. An APS worker is coupled with a staff registered nurse to go out on a home visit based on the allegation identified during intake. If the client presents with cognitive concerns, APS contracts with a local hospital's home visitation geriatricians to assess the client for capacity issues. Geriatric assessments themselves often results in long scheduling delays or missed appointments by clients that often have comprehension concerns. The EIT looks to reduce recidivism, account for unplanned emergency room visits, develop timely protective plans that minimize harm and stabilizes the client and can be useful in obtaining a statement of expert evaluation for clients that require a legal decision maker/guardian.

## 603 - Opening the Door: A Training for Engaging in Attuned Adult Protective Services Work

*WASHINGTON C (3rd FLOOR)*

**Caroline Rosenthal Gelman, PhD, Silberman School of Social Work, Hunter College, City University of New York**

**Geoffrey Rogers, BA, Brookdale Center for Healthy Aging, Hunter College, City University of New York**

**Agnes Halarewicz, MSW, Silberman School of Social Work, Hunter College, City University of New York**

**Angela Ghesquiere, PhD, Brookdale Center for Healthy Aging, Hunter College, City University of New York**

Up to 1 in 10 Americans over age 60 are victims of elder abuse every year, but elder abuse is significantly under-reported. Adult Protective Services (APS) workers are often the front-line responders in elder abuse cases. Thus, training APS workers to recognize signs of elder abuse and interact with both elders suspected of being victimized and alleged abusers in a manner that maximizes disclosure of abuse is critical. Therefore, we refined, implemented, and evaluated an interactive 8-hour training program that utilizes a relational approach and active learning techniques to foster engagement, trust, and connection between the APS worker and alleged victims and abusers. The theoretical and clinical rationale for this relational approach is that alleged victims and abusers who feel the APS worker is trustworthy, attuned and engaged are more likely to disclose abuse. The training was developed and revised with extensive input from APS workers and supervisors. In this workshop, we will outline the curriculum content and present brief portions of the curriculum so that participants can experience it. We will also discuss findings on the training's impact on engagement knowledge and self-efficacy, collected in recent pilot testing with 2 cohorts of APS workers in New York City. In addition, attendees will have the opportunity to provide feedback on curriculum structure and content. In the future, we hope to disseminate the training broadly, both locally and nationally.

## 604 - Boots on the Ground: Fighting Pension Poaching Scams Against Elder Veterans in San Francisco

*COMMONWEALTH A (2nd FLOOR)*

**Shawna Reeves, Institute on Aging**

**Tamari Hedani, Institute on Aging**

**Jill Nielsen, LCSW, Adult Protective Services, City and County of San Francisco**

Veterans Aid and Attendance scams (aka "pension poaching" scams) targeting elder veterans were first detected by advocates in 2007 and continue to threaten the financial well-being of thousands of veterans across the country. California passed legislation to reign in the worst practices of abusers, with other states following suit, but most elder veterans are unaware of how to avoid pension poaching scams and where to turn for help. To address this need, the Institute on Aging, in partnership with San Francisco's Department of Aging and Adult Services, the county's Adult Protective Services program, and County Veterans Services Organization, launched a ground-breaking program to form systematic responses aiming to: 1) educate elders and APS workers about pension poaching scams, including how to avoid them, 2) direct elders who have already been scammed and their advocates to legal and/or regulatory resources that can help, 3) connect elders who wish to apply for the Veterans Aid and Attendance benefit to their local CVSO, and 4) coordinate with the California Department of Insurance and the Attorney General about ways to better regulate and prosecute scammers.

## 605 - Fraud in Guardianship: The Crime of the 21st Century

*COMMONWEALTH B (2nd FLOOR)*

**Anthony Palmieri, JD, CIA, CCSA, Clerk & Comptroller, Palm Beach County**

**Honorable Sharon R. Bock, Esq., Clerk & Comptroller, Palm Beach County**

As our nation's population continues to rapidly age, the importance of understanding and monitoring guardianship (conservatorship) fraud will grow exponentially. Understanding and monitoring guardianship fraud is critical to protecting society's oldest and most vulnerable citizens - incapacitated adult wards. The Clerk & Comptroller of Palm Beach County (Florida), Sharon R. Bock, Esq., and her Inspector General team perform highly specialized and in-depth audits and investigations of guardianships. Since inception of the Clerk's program, her chief investigator, Anthony Palmieri, has audited and investigated over 900 guardianship cases and identified over \$4.5 million worth of unsubstantiated disbursements, missing assets and fraud. From the Florida Panhandle to the Florida Keys, there are over 500,000 elderly persons with Alzheimer's type dementia in the state. With over 100,000 persons over eighty-five years of age, Palm Beach County is considered by many to be an epicenter of the greying nation. The Clerk's

Guardianship Fraud Program was designed to address a pervasive issue within this elder population; and due to the “grey tsunami” eclipsing the United States, these same issues will be experienced by many other cities and municipalities within the next 5 to 10 years. Session participants will hear about a cutting-edge monitoring program that is successfully deterring and identifying guardianship fraud. A unique component of the program is a dedicated guardianship fraud hot line that encourages concerned persons to report anyone suspected of perpetrating financial fraud, abuse, or exploitation.

### **606 - Proactive Ways to Influence the Potential Reduction of Elder Abuse Amongst our Aging Society**

*COMMONWEALTH C (2nd FLOOR)*

***Candice Simeoni, York County Elder Abuse Task Force/Kennebunk Police Department***

The workshop is designed to inspire those who are thinking about starting an Elder Abuse task force, Elder Abuse reduction program or any Elder Abuse related initiative. Presenter: Candice Simeoni is the Chair of a well developed Task Force in the state of Maine. She has been an law enforcement officer since 2004 and has been featured in many media outlets about the work she has done and is currently doing in support of our aging nation. Candice is an instructor at the Maine Criminal Justice Academy teaching cadets the importance of focusing on Elder Abuse and presents around the State of Maine on Elder Abuse related concerns. Her task force structure and implementation plan has been used Nationwide. She prides herself on her motto: “Taking Care of Those Who Once Took Care of Us.”

### **607- Banks & credit unions: Working with them to prevent & respond to financial exploitation**

*COMMONWEALTH D (2nd FLOOR)*

***Naomi Karp, Consumer Financial Protection Bureau  
Diane Menio, CARIE (Center for Advocacy for the Rights and Interests of the Elderly)***

Financial institutions play a vital role in preventing and responding to elder financial exploitation. They’re uniquely positioned to detect that an older account holder has been targeted or victimized and to take action—and they can play an important role when APS is investigating an allegation. At this workshop, the federal Consumer Financial Protection Bureau (CFPB) will describe its recent advisory and recommendations

to banks and credit unions. Learn about the CFPB’s recommendations on fraud detection, reporting, sharing records with APS and law enforcement, collaborating with key stakeholders and other best practices relevant to your work. Find out about what financial institutions across the country are doing now and how that might change. The presentation also will cover CFPB findings and tools for working in local and regional multidisciplinary networks with financial institutions. Presenters will share other

relevant CFPB publications, consumer tools and public education programs. In addition to CFPB’s presentation, the Executive Director of a leading Philadelphia advocacy organization will describe its work on elder financial exploitation and collaboration with multiple stakeholders, including financial institutions. NOTE: THIS WORKSHOP IS APPROPRIATE FOR ALL LEVELS OF EXPERIENCE (the questionnaire does not give that as an option)

### **608 - Ensuring a Successful NAMRS Data Submission**

*CONGRESS A (4th FLOOR)*

***Karl Urban, WRMA, Inc.  
Stephanie Eliason, ACL, Office of Elder Justice & APS***

The Administration on Community Living (ACL) and state APS programs are working in partnership to implement the National Adult Maltreatment Reporting System (NAMRS). States are preparing their first data submission for early 2017. This session will provide state APS administrators an update on what they need to know and do to ensure successful submission of data and will provide them an opportunity to provide feedback to ACL and WRMA on implementation efforts to-date.

### **609 - Elder Fatality Review & NAPSA**

*Room: Howe / 33rd Floor*

***Teri Covington, Michigan Public Health Institute***

Multi-disciplinary fatality review teams have been in existence for well over two decades for children and at least 15 years in the domestic violence field. These teams identify factors that lead to untimely deaths and implement changes in various policies and practices to prevent similar deaths in the future. While there are relatively few review teams for examining deaths of older adults related to elder abuse, neglect, and exploitation, there is growing interest in establishing elder fatality review teams (EFRTs). To support this interest NAPSA is partnering with the National Center for Fatality

Review and Prevention (NCFRP) at the Michigan Public Health Institute to build and support EFRTs. This session will just-released results of a national survey about EFRTs and describe NAPSA's efforts to support and expand EFRTs nationally.

## WORKSHOP SESSIONS 7 WEDNESDAY AUGUST 31, 2016 10:45 AM - 12:15 PM

### 701 - Polyvictimization in Later Life

*WASHINGTON A (3rd FLOOR)*  
*Candace Heisler, JD, Heisler and Associates*  
*Trudy Gregorie, Justice Solutions*  
*Holly Ramsey-Klawnsnik,*  
*Kathleen Quinn, NAPSA*

Research has shown that victims frequently suffer multiple forms and incidents of elder abuse which result in multiple harms. This session will review relevant research, draw on recommendations from experts to describe the nature and impact of polyvictimization, and discuss how to craft victim-centered, trauma-informed responses. The session will introduce an online curriculum for practitioners to use to better understand the experience of polyvictimization and to develop effective responses.

### 702 - Assessing financial decision making and exploitation

*WASHINGTON B (3rd FLOOR)*  
*Peter A. Lichtenberg, Wayne State University*

One of the challenges in preventing the financial exploitation of older adults is that neither criminal justice nor noncriminal justice professionals are equipped to detect capacity deficits. Because decision-making capacity is a cornerstone assessment in cases of financial exploitation, effective instruments for measuring this capacity are essential. Deficits in financial decision-making abilities are often the hidden element in financial exploitation cases. In 2015 at NAPSA we introduced a new person-centered screening scale. The brief screen we will examine combines evaluation for potential financial exploitation and assessment of decisional abilities, and is intended for use in the context of a significant real-life financial decision. We will explore the new empirical evidence supporting the scale, describe its implementation and usage and trouble shoot potential difficulties. It is our hope that this scale, currently adopted across 5 states will be used even more widely.

### 703 - Preparing for NAMRS: California's Story

*WASHINGTON C (3rd FLOOR)*  
*Pi-Ju (Marian) Liu, University of California, San Francisco*  
*Lori Delagrammatikas, California Department of Social Services*  
*Sandy Skezas, MSW, Santa Cruz County*  
*Jill Nielsen, City and County of San Francisco, Department of Aging and Adult Services*

California's Adult Protective Services (APS) program investigates approximately 15% of all elder abuse, neglect, and exploitation reports in the country. But as a county-based system, each of the 58 counties operate independently and lack the capability to share case level data. Very few data fields are tracked on a state level in aggregate. Given these circumstances, collecting and submitting state level data to the National Adult Maltreatment Reporting System (NAMRS) will be a challenge for the state. This workshop will review California's evaluation process as it sets out to drastically change state level data collection practices. This panel presentation will review the process and findings from an evaluation that was conducted in partnership with the University of California, San Francisco. Challenges including administrative, budgetary, and political issues will be summarized, and a blueprint for next steps in California will be outlined. County-based APS programs will benefit from learning about California's process. Active participation is expected from the audience, since the panel would like to exchange experiences with other states.

### 704 - Identifying risk factors and processes to assist with ongoing case management

*COMMONWEALTH A (2nd FLOOR)*  
*Nanci Thaemert, Idaho Supreme Court*  
*Renae Bieri, MPH, Idaho Supreme Court*

This workshop will describe how the Idaho courts teamed with stakeholders, including judges, adult and child protective service workers, attorney's and court personnel, to develop and implement a tool to monitor the care of persons under guardianship. This tool is designed to identify those cases where the most potential concern for abuse and exploitation exist and provide monitoring and case management where most needed. This assessment tool consists of 39 questions used to identify potential issues of concern within each case. Questions answered in the affirmative, indicating a potential issue is present, are given a score between 1 and 5. Once a score is assigned, the court is given a menu of

options to monitor the case using both court and community resources and ensure vulnerable persons are receiving the protection they need. The workshop will provide an opportunity to learn about how the Idaho courts and non-judicial partners worked together to identify processes to bring possible abusive situations occurring in the lives of persons under guardianship or conservatorship to the court's attention through a community complaint process. With a comprehensive plan in place that includes the case management tool, complaint process, and a menu of monitoring options, workshop participants will learn how to engage everyone in the system to protect vulnerable persons.

### **705 - The Life of a Guardian: Telling the Difference Between Incapacity and Questionable Decision Making**

*COMMONWEALTH B (2nd FLOOR)*

**Wanda Jones-Bevington MS, LSW, NCG, National Guardianship Association**

Good guardians consider the rights, desires and preferences of persons under guardianship. Sometimes guardians agree with the decisions that people under guardianship make, but sometimes they feel that the decision is not in the individual's best interest. When is it okay to let a person under guardianship make a "bad" decision? This interactive presentation will utilize casework examples that focus on identifying clues to reveal why an individual may be making a particular decision. Participants will discuss how a guardian should use the National Guardianship Association's Standards of Practice to guide him or her in assisting the person under guardianship to reach the best decision for that individual.

### **706 - Social Media and Electronic Communication Evidence in Protective Services Investigations**

*COMMONWEALTH C (2nd FLOOR)*

**Christopher Dubble, Institute on Protective Services at Temple University**

In today's digital world, Protective Services Investigators must increasingly recognize Social Media and Electronic Communication as critical sources of evidence for their investigations of abuse, neglect, and exploitation. Increasingly perpetrators and victims leave evidence on Electronic Communication, such as emails, texts, and voicemails, and the ever-expanding number of Social Media Sites and Applications, like Facebook, Twitter, Snapchat, Instagram, just to name a few.

Once recognized, investigators need to understand the proper investigatory steps to collect this evidence in a way that will hold up to the evidentiary standards of relevance and authenticity. This interactive practice based workshop will lead attendees through case examples of Social Media and Electronic Communication Evidence and step by step demonstrations on how to collect these sources of evidence.

### **707 - Depression and Suicide: Considerations for Adult Protective Services Specialists**

*COMMONWEALTH D (2nd FLOOR)*

**Kimberly Pearce, County of San Diego Adult Protective Services**

APS is continually challenged by limited resources and difficult decisions about how to best allocate those resources. APS in San Diego is committed to providing information and training to ensure that APS workers are well equipped when confronted with intense and potentially lethal situations involving depressed and suicidal seniors. In the last few years, APS in San Diego became concerned with the number of suicide and suicide/homicides occurring in our community. In 2014 a workgroup was formed to look at identifying risk factors associated with suicide and depression. The workgroup determined that within APS annual uniform training needed to be provided for all of the APS workers and that new workers would be provided training regarding depression and suicide assessment and risk factors within the first year of employment. The workgroup developed Policy and Procedure recommendations and reviewed and evaluated many assessment tools. APS has become a member of the San Diego Suicide Prevention Council and contributes to the development of the annual Suicide Prevention Council Report to the Community. The purpose of this training is to share with front line workers practical information and lessons learned from the San Diego workgroup.

### **708 - APS Partnerships With Your State Regulator of Financial Institutions**

*CONGRESS A (4th FLOOR)*

**Jared Elost, Esq, Assistant Counsel, New York State Department of Financial Services**  
**Sheryl Nadell, LNHA, Program Manager, Adult Protective Services, Maine Department of Health & Human Services**  
**Judith M. Shaw, Esq., Securities Administrator, Maine Office of Securities**  
**Alan Lawitz, Esq., Director, Bureau of Adult Services**

### ***New York State Office of Children & Family Services***

In some States APS has worked together successfully with the State regulator of financial institutions to benefit APS clients. In New York, for example, the State APS agency has worked with the State Department of Financial Services (DFS) to develop and issue guidance to financial institutions on the role of APS, how to report ; encouraging cooperation with APS requests for information to assist investigations of financial exploitation; and how DFS can investigate and otherwise assist in such cases. DFS has also co-presented with APS in trainings of financial professionals. Other States have similar initiatives. Learn about these current practices, which you may wish to adapt for similar initiatives in your own jurisdiction.

### **709 - Abuse Intervention/Prevention Model among Persons with Dementia and their Caregivers**

*HOWE (33rd FLOOR)*

***Bonnie J. Olsen, Ph.D., University of Southern California***

The Abuse Intervention/Prevention Model (AIM) study was conducted to test the effectiveness of the model in measuring the risk of elder abuse in adults with dementia/caregiver dyads. 76 community dwelling older adults with dementia/caregiver dyads were recruited from APS, clinics, and community agencies. Participants were administered in-home baseline assessments of abuse risk, given resource referrals to mitigate those risks, and reassessed at 3-month follow-up. All dyads met at-least one criterion for abuse risk. Nearly 1/3 were engaged with APS. This talk will present key findings that help us understand the factors associated with greater risk of abuse in this vulnerable population.

### **WORKSHOP SESSIONS 8 WEDNESDAY AUGUST 31, 2016 3:00 PM - 4:30 PM**

### **801 - Funding Training, Collaboration & Services on Abuse in Later Life through OVW**

*WASHINGTON A (3rd FLOOR)*

***Lisa G Furr, VA Office of the Attorney General  
Candance Heisler, JD, Heisler and Associates  
Ann Laatsch, J.D., National Clearinghouse on Abuse in Later Life (NCALL)***

The Office of Violence Against Women has for more

than ten years offered a grant “Enhanced Training And Services To End Abuse In Later Life Program” that focuses on a comprehensive approach to addressing elder abuse in communities. These projects train criminal justice professionals to enhance their ability to address elder abuse, neglect and exploitation; provide cross-training opportunities to professionals working with older victims; establish or support a coordinated community response to elder abuse; and provide or enhance services for victims who are 50 years of age or older. This workshop will focus on the benefits of these grants and the advantages applying for the funds can bring to your community. Join the presenters who have worked with those awarded this grant over the years as we explore what your community can do to apply for these grant funds.

### **802 - Government at Work: Addressing Financial Exploitation of Seniors**

*WASHINGTON B (3rd FLOOR)*

***Stacy Rodgers, Social Security Administration***

The workshop will highlight SSA’s efforts to heighten awareness of the incidence of abuse, neglect, and financial exploitation for our target audiences, representative payee program participants, and other individuals who serve the senior population.

### **803 - Listening Session for APS Administrators**

*WASHINGTON C (3rd FLOOR)*

***NAPSA Regional Representatives Board***

APS programs face many challenges: funding, workforce, case load, quality assurance and so on. APS program administrators (heads of state or county programs) are responsible for meeting these challenges. And NAPSA, as your membership organization, wants to provide you with support in meeting the challenges. The NAPSA Regional Representatives Advisory Board (RRAB) is responsible for making sure NAPSA knows about key issues and facilitating discussion of key issues. This session is an opportunity for APS Administrators to sit down informally with members of the RRAB to discuss your day-to-day challenges. This will help NAPSA better address your needs.

### **804 - “Verbal Abuse Mosaic” Protect/Prevent/Empower**

*COMMONWEALTH A (2nd FLOOR)*

***Paul Needham  
Steve Field***

Verbal, Psychological, Emotional Abuse how serious can it be? “After all it’s just Verbal Abuse” This interactive & impactful workshop participants will learn more about VERBAL ABUSE: What is it? How to Identify it? What the Effects of it Can? Come and learn more about what we all need to know. You will be moved. You will be motivated.

## 805 - APS Standards of Nursing Practice

*COMMONWEALTH B (2nd FLOOR)*

*Janine Brady, San Diego County APS*

The National Coalition of APS Nurses has been working for the past year on developing the Standards of Practice for APS Nurses. The document is in the final draft stages and available for input from APS nurses, APS social workers and supervisors, public health departments and IHSS supervisors. This is a workgroup to gather information and ideas from participants.

## 806 - Your Future Paycheck: What You Need to Know About Social Security, Pensions, Savings & Investments

*COMMONWEALTH C (2nd FLOOR)*

*Lara Hinz, Women’s Institute for a Secure Retirement*

*Linda K. Stone, Society of Actuaries*

Living much longer than their parents’ generation, today’s seniors are spending more time in retirement than in the years planning for it. This longevity, however, puts many people at risk for running out of money. Women are especially at risk due to longer life expectancies, lower lifetime earnings, and time out of the workforce for care giving. This workshop will look at the retirement risks workers and especially women face and provide practical information and resources for managing these risks and developing a long-term financial plan. This session will include a discussion about the different sources of retirement income and strategies for making that income last a lifetime.

## 807 - A View from the Bridge: Exploring Financial Exploitation from a Multidisciplinary Perspective

*COMMONWEALTH D (2nd FLOOR)*

*Randolph W. Thomas, MA, Law Enforcement (retired)*

*Rebecca C. Morgan, JD, Stetson University College of Law, Center for Excellence in Elder Law*

*Pamela B. Teaster, PhD, Virginia Tech, Center for Gerontology*

This session will offer 75 years of acquired multidisciplinary perspective to examine five highlighted cases (selected by the presenters) from the past year’s headline-grabbing elder financial exploitation cases to distill the overall ethics, aging and theoretical constructs, the criminal justice responses and the successes and failures of our current system of responding to financial exploitation. The presenters, pooling their years of experience, will offer a multidisciplinary look at where we started, how far we have come, how far we have yet to go, and what works and what doesn’t in the ongoing battle against financial exploitation. These current cases will be used to illustrate the foundations created years ago and currently applied to these cases and note the shortcomings of our system, from the perspective of criminal justice, civil remedies and theoretical constructs and the need to bridge the gaps in crafting an effective response.

## 808 - Understanding APS Guardianship Cases in New York State

*CONGRESS A (4th FLOOR)*

*Raquel Romanick, JD, Brookdale Center for Healthy Aging, Hunter College, City University of New York*  
*Jean Callahan, JD, Brooklyn Neighborhood Office of The Legal Aid Society*

*Angela Ghesquiere, PhD, MSW, Brookdale Center for Healthy Aging, Hunter College, City University of New York*

When an adult lacks ability to make legal, financial or health care decisions, and advanced directives are nonexistent or insufficient, guardianship may be instituted. Through this legal proceeding, the court determines whether a person should be declared legally incapacitated and appoints someone to make decisions regarding their health, safety or financial well-being. It is often APS that first becomes aware of need for guardianship or who petitions for guardianship, usually because they were already working with the vulnerable adult or were called to address a health, safety, or financial crisis. While APS’ mission and the laws around APS and guardianship are the same across New York State (NYS), there is tremendous variation in practice. This workshop will outline the guardianship statute in NYS, and discuss a recent file review of 2416 guardianship cases in 14 NYS counties, focusing on cases with APS involvement. We found that the county (typically, APS) petitioned for guardianship and was appointed guardian in about 20% of cases. However, some counties were more likely to have APS guardians than others; variability occurred most when there were other

(typically non-profit) agencies available to serve as guardian. We will also discuss how adults with APS guardians differ from those with other guardians, and how the guardianship process works in APS cases. Finally, the clinical implications of findings for APS workers, supervisors, and administrators will be reviewed.

**809 - Elder Justice Task Forces**

*HOWE (33rd FLOOR)*

**Shelly Jackson, PhD, US Department of Justice**  
**Susan Lynch, JD, MPH, PhD, US Department of Justice**

APS recognizes the need to adopt a multidisciplinary response to elder abuse. On March 30, 2016, the US Department of Justice launched 10 regional Elder Justice Task Forces, one specific type of multidisciplinary response that responds to the abuse and neglect of nursing home residents. The Elder Justice Task Forces include representatives from the U.S. Attorneys' Offices, state Medicaid Fraud Control Units, state and local prosecutors' offices, the Department of Health and Human Services (HHS), state Adult Protective Services agencies, Long-Term Care Ombudsman programs, and law enforcement. By bringing everyone together to conduct joint investigations, share information, and to have regular meetings, these teams will more effectively and quickly pursue nursing homes that are jeopardizing the health and well-being of their residents. The 10 Elder Justice Task Forces have been launched in the following Districts: Northern District of California, Northern District of Georgia, District of Kansas, Western District of Kentucky, Northern District of Iowa, District of Maryland, Southern District of Ohio, Eastern District of Pennsylvania, Middle District of Tennessee and the Western District of Washington.

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# CONGRATULATIONS TO OUR 2016 CONFERENCE AWARD WINNERS



## ***Special Board Award - Kathleen Quinn***

Kathleen Quinn has been the Executive Director of the National Adult Protective Services Association since 2006. Previously she served as Policy Advisor on Senior Issues to the Illinois Attorney General, and as the Chief of the Bureau of Elder Rights for the Illinois Department on Aging, where she was responsible for administering the statewide Elder Abuse and Neglect (APS) Program, the Long Term Care Ombudsman Program, and for overseeing the state's Legal Services Developer. Ms Quinn earlier worked with the Illinois Coalition Against Domestic Violence, where she was responsible for the first ever statewide training of law enforcement and prosecutors on domestic violence and the then newly enacted Illinois Domestic Violence Act (IDVA). Ms. Quinn is a past president of NAPSA, a former board member of the National Committee for the Prevention of Elder Abuse, the Illinois Family Violence Coordinating Council, the Illinois Center for Violence Prevention and numerous local community charitable boards, and the recipient of several awards for victim advocacy work. She is being honored for her many years of service to NAPSA, as she retires from her position this year.



## ***Rosalie S. Wolf Memorial Award - Jason Karlawish, MD***

Dr. Jason Karlawish is an internationally known expert in the field of cognitive aging and financial capacity. Jason has been published extensively in various publications and recently coined the term "Whealthcare" to highlight the need for the financial services and health care systems to cooperate in order to promote both health and conservation of assets in old age. Jason is a member of the Philadelphia Financial Exploitation Prevention Task Force and an advisory board member of the National Institute on Elder Financial Exploitation.



## ***President's Award - Alan Lawitz, JD***

Alan Lawitz is the Director, Bureau of Adult Services for the state of New York as well as serving as a regional representative for NAPSA. Alan was the driving force behind a ground-breaking research study called the NYS Cost of Financial Exploitation of Vulnerable Adults. This continues Alan's dedication to breaking down barriers with financial institutions which have traditionally not been cooperative with APS investigations. Alan is active with many related councils, coalitions and boards dedicated to fighting the abuse of vulnerable adults.

# CONGRATULATIONS TO OUR 2016 CONFERENCE AWARD WINNERS



## *Spirit of NAPSA Award in honor of Jan Stiles - Suzette Hatten*

Suzette Hatten truly represents the Spirit of NAPSA! She is known throughout Coffee County, Alabama for her compassion and expertise and always going above and beyond the call of duty. She has been known to work nights and weekends and for doing whatever it takes to insure the safety of her clients. Suzette's networking abilities are revered by her community and have played a huge role in her county's World Elder Abuse Day celebration.



## *NAPSA Collaboration Award - Candace Heisler, JD*

Candace Heisler has been a pioneer in training APS workers on how to work effectively with law enforcement. She has also trained thousands of law enforcement offices on how to investigate elder abuse cases. Candy is also a prolific author with an impressive list of publications on elder abuse. Her body of work bridging the gap between the criminal justice system and APS is unmatched and has helped promote a mutual understanding between the two systems.



## *Joanne Otto Distinguished Service Award - Lori Delagrammatikas, MSW*

Lori has been a force in APS and an important contributor to NAPSA and the field for many years. Her work with Project Master while at San Diego State University in developing and distributing the Core Training Modules has reached legendary status! These same standards became one of the building blocks for the Administration for Community Living's "Draft Voluntary Consensus Guidelines for State APS Systems." Lori continues to further the growth and development in California and across the country.

# NAPSA CONFERENCE KEYNOTE SPEAKERS



## TERESA OSBORNE, SECRETARY OF AGING

Teresa Osborne was nominated on January 16, 2015 by Governor Tom Wolf, and was confirmed as Secretary of the Pennsylvania Department of Aging by a unanimous vote of the Senate on May 13, 2015.

Secretary Osborne most recently served as the Executive Director of the Luzerne/Wyoming Counties Area Agency on Aging; previously served as Chancellor and Chief Operating Officer of the Diocese of Scranton and prior to that was Executive Director of the Lackawanna County Department of Human Services and Executive Director of the Lackawanna County Area Agency on Aging. A native of Scranton, Pennsylvania, Secretary Osborne has over two decades experience working with and advocating for older Pennsylvanians and other vulnerable populations.

She has volunteered with numerous not for profit and community organizations focused on improving conditions for seniors, persons with disabilities and the marginalized. She was recognized by Marywood University with their Recent Graduate Award, received the Legion of Honor Award from The Chapel of Four Chaplains, and was recognized as a Northeast Woman of distinction by the Scranton Times-Tribune.

Ms. Osborne has a long history of involvement in professional and community service arenas including: the Scranton Lackawanna Human Development Agency, Friends of Holy Family Residence, the Shamrock Heart Foundation and St. Joseph's Center Festival Committee.

She earned her Bachelor of Social Work degree and Masters of Health Service Administration from Marywood University. She was an Immaculate Heart of Mary Scholar and is a member of the Alpha Epsilon Lambda Honor Society, the Pi Alpha Alpha Public Administration Honor Society and the Sigma Phi Omega Gerontology Honor Society.

# NAPSA CONFERENCE KEYNOTE SPEAKERS



## ANNAROSE INGARRA-MILCH

Annarose Ingarra-Milch is a sought-after inspirational speaker, positive aging advocate, and author of the award-winning novel “Lunch with Lucille”.

A frequent speaker at international, national, and local conferences, Annarose draws upon her lifetime experiences as an investigative and supervisory probation officer, criminal justice educator, corporate trainer, and serial entrepreneur to share an uplifting message about the value of age.

Annarose works closely with Temple University Harrisburg providing soft skills training for professionals serving our vulnerable adult and older adult populations.

She is the President of ROI Training & Consulting, LLC, a premier professional development and business management consulting firm. Her web-series, “The People Chronicles – Storied Women” showcases local women who bravely share stories of how they shifted an adversity into an advantage. Deeply invested in her community, Annarose serves as a mayoral appointed Stadium Commissioner for the Fightin Phils and City of Reading and on the board of directors of FairView Children’s Play Therapy Counseling Center and The Wisdom Coalition.

In July, Annarose was crowned Ms. Pennsylvania Senior America, 2016. She is the 2016 Sallie Lee Lifetime Achievement Award recipient, TriCounty YWCA, Pottstown, PA, and is a Wall Street Journal Woman of Note. In late September Annarose will offer a TEDx Talk titled, “Your Age is Your Best Asset.”

Annarose and her positive aging message have been featured in the Wall Street Journal Retirement Living, TD Ameritrade online, on television and radio talk shows, as well as in numerous newspapers and magazines.

Living in Reading, PA. Annarose is married to Charles for almost four decades. They have three very grown children and four grandchildren.

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**NAPSA is seeking members who would like to get more involved in  
the organization by joining one or more of NAPSA's standing committees  
that serve the Board of Directors.**

Whether you are a long-time member of NAPSA or have just recently joined, your involvement is welcome and appreciated. As a new NAPSA member, you can offer new ideas and perspectives that are most beneficial in assisting with the organization's growth. Tenured members bring their experience and knowledge which help further NAPSA's success.

A brief synopsis of the goals of each Committee, activities and current projects/recent accomplishments is listed below.

## COMMUNICATIONS

The Communications Committee focuses on developing strategic initiatives to effectively expand NAPSA's reach across diverse populations and bolster NAPSA's identity and ability to attract funding for public awareness campaigns highlighting abuse, neglect and exploitation. Teleconference monthly on the second Wednesday afternoon.

## PUBLIC POLICY

The Public Policy Committee advocates on issues and legislation effecting the abuse, neglect and exploitation of vulnerable adults and other related issues germane to adult protective service programs across the country. Teleconference monthly on the third Friday at 2:30 ET.

## EDUCATION

The NAPSA Education Committee serves to emphasize the development of increased skills, knowledge, and abilities of APS professionals by developing and disseminating training materials for APS and allied professionals. The Education Committee encompasses three subcommittees: Curriculum Development, Education Review and Certification. Teleconference meetings occur monthly on the fourth Thursday afternoon.

## MEMBERSHIP

The goals of the Membership Committee are to expand NAPSA membership, identify unaddressed needs of current members and increase involvement with the organization by developing an inclusive volunteer recruitment, training, support and recognition program. Teleconference meetings are monthly on the second Tuesday a 2:30 ET.

## NAPSA-NCPEA JOINT RESEARCH

The NAPSA/National Committee for the Prevention of Elder Abuse (NCPEA) Research Committee is a unique joint effort by two national organizations to expand and encourage the linkage between research and practice in the field of elder abuse. The committee welcomes both practitioners and researchers and meets via teleconference monthly on the third Wednesday from 3-4:30 ET.

**Not a member? Join!** Visit us at [www.napsa-now.org/join](http://www.napsa-now.org/join) to sign up. Professional memberships start for as little as \$25.

**Already a member? Interested in participating?** Simply provide your contact information below, indicate which committee(s), remove this page and leave it at the Conference Registration Desk.

## NAPSA Member Committee Sign-Up

*Please Print*

NAME \_\_\_\_\_ EMAIL \_\_\_\_\_

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\*\*\*If you miss turning this in during the conference, you can email your contact information & committee selection to: [info@napsa-now.org](mailto:info@napsa-now.org).









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**Liberty is the Pennsylvania Department of  
Human Services statewide contractor  
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**Please stop by and visit us at Exhibit #12**

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# HELP PROTECT YOURSELF FROM FRAUD

Never send money to someone you haven't met in person and confirm emergency situations are real before sending money.

**If you believe that you are a victim of fraud, call the Western Union Fraud Hotline at 1-800-448-1492.**

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