



28th Annual National Adult Protective Services Association Conference

# **Justice for All:** **Protecting Our Vulnerable Adults**

**August 28-30, 2017**  
**Hilton City Center | Milwaukee, WI**

*Primary Conference Partner*

**Wisconsin Department of Health Services**

Division of Public Health  
Division of Care and Treatment Services  
Division of Medicaid Services  
Division of Quality Assurance

**Register Now at [www.napsa-now.org/conference!](http://www.napsa-now.org/conference!)**



# Host Hotel

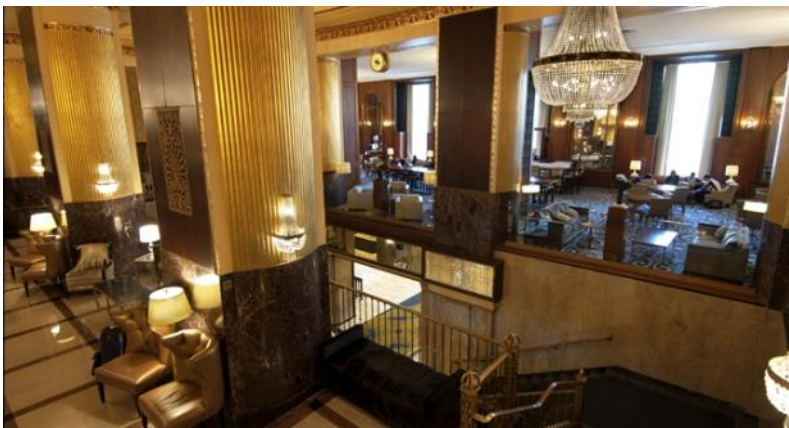
## Hilton City Center | Milwaukee, WI



The Hilton Milwaukee Downtown hotel is a classic art deco hotel with rich furnishing and distinctive architecture built in 1927. Originally called The Schroeder Hotel, today the Hilton Milwaukee Downtown is recognized as the city's largest hotel with a tradition of excellence spanning nearly 85 years. The gracious style of the hotel is reflected in impeccable service and attention to every detail provided by a tenured team of hospitality professionals. We are proud to say we are a AAA Four Diamond hotel.



Combining 1920's grandeur and elegance with today's modern conveniences, the Hilton Milwaukee Downtown is the premier choice of business travelers, families, corporate events, galas and weddings. The Milwaukee hotel features 729 guest rooms and over 30,000 square feet of meeting space, including the 8,800 square foot ornate Crystal Ballroom, and the regal Empire Ballroom. The Hilton Milwaukee City Center is located among the downtown Milwaukee hotels on Wisconsin Avenue, the main thoroughfare of downtown living, and is connected to the city's convention center.



Theatre, and a bounty of boutique shops. Families will enjoy the Discovery World and the Betty Brinn Children's Museum.

**Visit [www.napsa-now.org/conference](http://www.napsa-now.org/conference) to make your reservations at the special conference rate.**





# CONFERENCE SCHEDULE AT-A-GLANCE

## Sunday August 27, 2017

9:00 AM - 5:00 PM | NAPSA Board of Directors Meeting *(Invitation Only)*

## Monday August 28, 2017

12:30 PM - 1:30 PM | Welcome and Opening Remarks

1:45 PM - 3:15 PM | Workshop Sessions 1

3:30 PM - 5:00 PM | Workshop Sessions 2

6:00 PM - 8:00 PM | Welcome Reception

## Tuesday August 29, 2017

9:00 AM - 10:30 AM | Workshop Sessions 3

10:45 AM - 12:00 PM | General Session 1

12:00 PM - 1:30 PM | Lunch *(On Your Own)*

1:30 PM - 3:00 PM | Workshop Sessions 4

3:15 PM - 4:45 PM | Workshop Sessions 5

## Wednesday August 30, 2017

9:00 AM - 10:30 AM | Workshop Sessions 6

10:45 AM - 12:15 PM | Workshop Sessions 7

12:15 PM - 1:45 PM | Awards Luncheon *(Lunch Provided)*

1:45 PM - 2:45 PM | General Session 2

3:00 PM - 4:30 PM | Workshop Sessions 8

4:30 PM - 5:30 PM | Closing Remarks & Basket Raffle

## Thursday August 31, 2017

8:30 AM - 5:00 PM | 8th Annual Summit on Elder Financial Exploitation *(Additional Charge)*

# REGISTRATION FEES

|   |       |
|---|-------|
| Wisconsin Adult Protective Services Staff | \$400 |
| NAPSA Member <i>(Early Discount)*</i>     | \$400 |
| Non-Member <i>(Early Discount)*</i>       | \$475 |
| NAPSA Member                              | \$475 |
| Non-Member                                | \$550 |
| Elder Financial Exploitation Summit       | \$150 |

*\*Early price is available until Tuesday August 1, 2017 at 12:00 AM ET*



## 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. For membership questions or concerns, please contact us at [www.napsa-now.org/contact](http://www.napsa-now.org/contact).

*Member benefits include:*

**Conference Registration Discount**

**Member Newsletter**

**Member Listserv**

**Networking Opportunities**

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





## Keynote Address

**Dr. Holly Ramsey-Klawnsnik, NAPSA Director of Research**

General Session 2 | Wednesday August 30, 2017 | 1:45 PM - 2:45 PM

### **Yes! We Can! Making APS Trauma-Informed**

What is trauma-informed care? Who is qualified to provide it? What is the value of this approach? Is it relevant within APS? If so, how can we make our services trauma-informed? And, isn't APS already trauma-informed? This address will explore these questions illustrating trauma-informed principles and their application to benefit clients AND staff. We will discuss concrete suggestions for assisting people who have suffered abuse, profound loss, and other traumas. Tips will be provided for APS and related providers ranging from support staff to administrators, as well as guidelines for making entire programs "trauma-informed."

*About the Speaker - Dr. Holly Ramsey-Klawnsnik is a sociologist researcher, Licensed Marriage & Family Therapist, and Licensed Certified Social Worker. She provided clinical evaluation and treatment services for years, including trauma-informed therapy and training and supervision for clinical*

*teams assisting victims. Her research, practice, and staff training address investigating alleged abuse, interviewing skills, casework intervention and supervision, mental health and mental capacity, domestic violence and sexual assault, victimization in facilities, polyvictimization, trauma-informed care, and self-neglect. The author of extensive journal articles, book chapters, training curricula, and technical assistance materials, Holly is delighted to collaborate with APS programs as NAPSA's Research Director.*

### **Self-Neglect Track**

NAPSA is offering a special "Self-Neglect Track" at this year's conference. These sessions are designated in **red**.

Participants who attend each of these sessions will be eligible for a certificate of 10.5 hours in specialty self-neglect training.

## **WORKSHOP SESSIONS 1**

**MONDAY 8/28/2017 | 1:45 PM - 3:15 PM**

### **101 - Dementia: Assessing & Addressing Challenging Behaviors (Part 1)**

*Tracy Schroepfer, University of Wisconsin-Madison*

Meeting the needs of an elder diagnosed with dementia can be challenging for people working with the elder and frustrating for the elder who cannot easily express their needs. Without the communication skills they once possessed, these individuals can become easily frustrated and display behaviors that caregivers may not understand or have the skills to address. In this workshop, participants will learn

about potential triggers for these behaviors; assessment techniques for determining the trigger that can occur in different situations; and effective communication, behavioral and environmental strategies for effectively addressing the triggers.

### **102 - APS Laws & Regs: "Did You Ever Think It Would Be This Much Fun"**

*Lisa Amador MSW, Hawaii Staff Development*

*Paul Needham MBA, TCS Services*

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 Rules and Regulations, one of the 24 APS Core Competency Training Modules identified by NAPSA and ACL. This workshop will be short on lecture and long on discussion, demonstration and interactive exercises. In doing so participants will learn: In this fun and interactive workshop participants will learn the value of the NAPSA Modules that make "Rules and Regs" an engaging and memorable time in the classroom. When was the last time you thought that when you were trained on policy and procedures?

### **103 - Awareness & Action: Educating Persons with Disabilities to Recognize, Report and Respond to Abuse**

*Jennifer Edwards-Hawkins, Disabled Persons Protection Commission*

*Anne Monti, Disabled Persons Protection Commission*

*Susan Moriarty, Mass Advocates Standing Strong*

*Pauline Bosma, Mass Advocates Standing Strong*



This workshop introduces and demonstrates the Awareness and Action (A&A) Trainer Guide and Curriculum developed for and by persons with intellectual and developmental disabilities and others on recognizing, reporting and responding to abuse. The A&A curriculum, taught by a team of 3-5 people with and without disabilities, involves participants in the most active learning process possible. It includes many types of instructional aides geared to reach persons with a variety of learning styles and abilities so information is accessible to and understood by all participants. Teaching people about recognizing, reporting and responding to abuse will empower and help keep them safer in their daily lives. The workshop includes various interactive activities led by an A&A training coordinator and self-advocate trainer. Participants will review the A&A Trainer Guide which provides all A&A trainers with the necessary skills, attitudes and knowledge to teach the challenging topic of abuse to a very diverse group of people. The guide contains training tips, preparation guidelines, information on facilitation, but most importantly an understanding that this topic can be emotional and affects both trainers and participants. An A&A Participant Workbook and training video which reinforce learning post training will be available for review. Through examination and discussion of all training materials, participants will acquire the necessary understanding to replicate this training in their state. Careful and sensitive training, provided by individuals with and without disabilities, is the first step in breaking down barriers to reporting abuse and thereby enabling people with disabilities to live meaningful lives within their communities.

#### **104 - Dementia: Stop, Starting It!**

*Cagney Martin, North Central Health Care*  
*Merry Wimmer, North Central Health Care*

When it comes to Dementia, our personal and cultural views of dementia tend to focus on suffering, loss, and behaviors. Because of those views caregivers, both personal and professional, mimic that attitude in the care they provide. But, if we can start to change that caregiver's perception, attitude, view of what dementia is, what abilities still exist, and what quality of life can look like, people can than really LIVE a full life with dementia. By using experiential activities to put caregivers in circumstances that many people with dementia live through each day, the workshop helps answer the question – who really is “starting it” and who ultimately has the ability to “stop it?”

#### **105 - National Institute on Elder Financial Exploitation - Listening Session**

*Joe Snyder, Philadelphia Corporation for Aging*  
*Kathleen Quinn, NAPSA*

The National Institute on Elder Financial Exploitation (NIEFE) was founded to support NAPSA and strengthen the capacity of adult protective services (APS) by working with a variety of disciplines and serving as a forum for innovative thinking, training and information sharing relevant to the exploitation of vulnerable adults. Members of the APS sub-committee will lead a discussion to gather information from participants on what are the major issues in the field and what would be most useful to you for NIEFE to pursue. This is open to all professionals with a particular emphasis on APS professionals.

#### **106 - Protecting LGBT Older Adults: Considerations for Safety, Health, Autonomy and Guardianship**

*J.J. Mesko-Kimmich, M.Ed., LPC, Volunteer Guardian Program/NGA Board of Directors*  
*Gizelle Jones, LISW-S, Jewish Family Service*

In this session, we will give an overview of our LGBT older adults and the barriers they face in healthcare and their personal lives. We will teach participants strategies and techniques to properly protect LGBT mature adults so they can live autonomously. Discussion and education will include Social Work and Counseling ethical guidelines, NGA Standards of Practice and organizational advocacy. We will educate and reinforce that LGBT adults deserve to live a life free of exploitation and abuse with dignity and respect.

#### **Self-Neglect Track**

#### **107 - The Cutting Edge in Self-Neglect: ACL Innovation Grants to Understand Self-Neglect**

*Dr. Holly Ramsey-Klawnsnik, NAPSA*

*Aiesha Gurley, Administration for Community Living*

*Stephanie Bergen, Rush University Medical Center*

*Dr. Farida Ejaz, Benjamin Rose Institute on Aging*

This panel workshop will be moderated by Ms. Aiesha Gurley, ACL Project Officer, and features presentations from the three teams currently conducting ACL-funded self-neglect projects: (1) The Rush University Medical Center, under the direction of Dr. XinQi Dong and in conjunction with the Rush Institute for Healthy Aging and key stakeholders and social service agencies, is leveraging and expanding on existing research to improve the prediction of elder self-neglect. They are creating predictive index of self-neglect onset in diverse communities and examining the racial/ethnic differences amongst several cohorts. (2) Benjamin Rose Institute on Aging, under the direction of Dr. Farida Ejaz and in partnership with TX APS, WellMed Charitable Foundation, and the Elder Justice Coalition are screening vulnerable adults attending TX primary care clinics for self-neglect risk factors. Those identified as self-neglecting are referred to APS. Those at risk receive targeted long-term services and supports to prevent self-neglect. A comparison group receives usual care. Evaluation assesses whether the intervention group has better outcomes than the comparison group, are more likely to remain at home, and have lower healthcare costs. (3) NAPSA, under the direction of Dr. Holly Ramsey-Klawnsnik, has utilized mixed methods to illuminate the problem of self-neglect, the volume of cases coming to APS attention, and current policies and practices regarding case assessment and intervention. The project includes a systematic literature review and nationwide survey research regarding APS policies, practices, tools, and innovative collaborations with community agencies.

#### **108 - Accessing VOCA Funds for Elder Justice**

*Shelly Jackson, Office for Victims of Crime/Elder Justice Initiative*

*Kate Peterson, Office for Victims of Crime*

*Laura Ivkovich, Office for Victims of Crime*

*Amanda Powers, Wisconsin VOCA Administrator*

Government and community-based elder abuse programs continue to be underfunded. In the last two years, Congress significantly raised the financial cap on VOCA funding, quadrupling 2016 funding that is available to states to support victim services. In addition, the new VOCA Victim Assistance Rule was finalized in August, 2016, which clarified and expanded states' allowable uses of VOCA victim assistance funding. With this tremendous increase in funding and the new Rule that clarifies and expands how states may expend the funding, states are looking to support previously underserved populations, such as victims of elder abuse. In this Workshop, a policy analyst with the Office for Victims of Crime (OVC) will briefly describe VOCA victim assistance funding and the new Rule. THE Wisconsin VOCA victim assistance state administrator will provide practical tips on how elder justice professionals can access VOCA funds in any

state. Finally, a policy analyst with the OVC will provide examples of VOCA-funded elder abuse programs. The remainder of the workshop will be devoted to answering specific attendee questions about VOCA and accessing VOCA funds.

## **WORKSHOP SESSIONS 2**

### **MONDAY 8/28/2017 | 3:30 PM - 5:00 PM**

#### **201 - Dementia: Assessing & Addressing Challenging Behaviors (Part 2)**

*Tracy Schroeffer, University of Wisconsin-Madison*

Meeting the needs of an elder diagnosed with dementia can be challenging for people working with the elder and frustrating for the elder who cannot easily express their needs. Without the communication skills they once possessed, these individuals can become easily frustrated and display behaviors that caregivers may not understand or have the skills to address. In this workshop, participants will learn about potential triggers for these behaviors; assessment techniques for determining the trigger that can occur in different situations; and effective communication, behavioral and environmental strategies for effectively addressing the triggers.

#### **Self-Neglect Track**

#### **202- Self-Neglect in Older Patients: Lessons from a Collaboration between a Healthcare System and APS**

*Dr. Farida Ejaz, Benjamin Rose Institute on Aging*

*Deborah Billa, WellMed Charitable Foundation*

*Catherine Bingle, Texas Adult Protective Services, Department of Family and Protective Services*

In a unique partnership, two Adult Protective Services (APS) specialists were embedded in a Texas healthcare system, WellMed Medical Management, to serve as a resource for clinicians. The APS specialists provided training on elder abuse to 826 clinicians at 63 primary-care clinics in five regions of Texas. WellMed also implemented screening for abuse using the EASI (Elder Abuse Suspicion Index). It was embedded in the electronic medical record. More than 11,000 EASIs were completed between 2013-2016. The APS specialists collected qualitative data on 529 WellMed patients reported to APS by clinicians. Findings indicated that 902 allegations of abuse were documented for these patients. The majority of patients (386) had a single allegation of abuse; 90% of the time, the allegation was self-neglect. Of the 140 patients with multiple allegations of abuse, 92% had an allegation of self-neglect in combination with other types of abuse (neglect by others, emotional abuse, exploitation, physical abuse, and/or sexual abuse). The most frequent patient outcome was refusal of APS services and/or denial of allegations, followed by receipt of home health services. Of the 617 allegations of self-neglect, more than two-thirds were validated, compared to validation of about half of all 902 allegations. The findings suggest the importance of further research on self-neglect, interventions for prevention, and the role of clinicians collaborating with APS to identify and help prevent self-neglect.

#### **203 - Developments in Multidisciplinary Team Responses to Elder Abuse: Resources and Research to Practice**

*Zach Gassoumis, University of Southern California*

*Talitha Guinn-Shaver, U.S. Department of Justice*

*Mary Twomey, U.S. Administration for Community Living*

Elder abuse multidisciplinary teams (MDTs) have evolved steadily

over the past 50 years. They provide important interprofessional collaboration between social workers and other elder abuse professionals, and MDTs models have been customized to meet a diverse range of system needs. Since the early 2000s, the traditional elder abuse MDT model has been refined with the introduction of the Elder Abuse Forensic Center (EAFC) model and other Enhanced MDTs. New attention and funding at the federal, state, and local level is allowing for the development, expansion, and refinement of these models nationally. This workshop will discuss the current state of multidisciplinary responses to elder abuse in the U.S., drawing on two federal initiatives. The Department of Justice's Elder Justice Initiative has established an MDT Technical Assistance Center to provide guidance to elder abuse networks and MDTs, helping to promote best practices nationwide. The Administration on Community Living's Office of Elder Justice and Adult Protective Services has funded a series of Elder Justice Innovation Grants, including a project to investigate the EAFC model nationwide. Building on these initiatives, we will review the diversity of elder abuse networks and MDTs, including information about resources available through the Technical Assistance Center. We will then focus on the EAFC model, emphasizing unique characteristics and its potential to improve practices and outcomes in the community.

#### **204 - Interviewing Alleged Perpetrators of Abuse**

*Candace Heisler, Heisler and Associates*

Interviewing the alleged perpetrator is a critical part of the APS investigation. Not all workers feel confident when conducting the interview. This workshop will use a case study and video clips and offer suggestions for enhancing worker and client safety when conducting the interview, preparing for an effective interview, and addressing challenges which may arise during the interview. Examples of effective and ineffective questioning will be provided.

#### **205 - The NAPSA Certificate Program**

*Kevin Bigelow, NAPSA/Kevin Bigelow-Training and Consulting*

*Lori Delagrammatikas, California Department of Social Services*

*Paul Needham, TCS Services*

This workshop is intended to inform attendees about the newly launched (by then) NAPSA Certificate program, its history, goals, requirements, and pricing. The intent of the workshop will be to provide information about the Certificate Program, and to encourage APS Programs to let their workers know about the certificate and perhaps to move toward having their entire program Certified.

#### **206 - Elder Fatality Review Teams: Growing the Field**

*Teri Covington, MPH, National Center for Fatality Review and Prevention*

*Bill Benson, NAPSA/Health Benefits ABCs*

*Kendra Kuehn, MSW, NAPSA/Health Benefits ABCs*

Multi-disciplinary fatality review teams have been in existence for over two decades for children and at least 15 years in the domestic violence field. Teams identify factors leading to premature deaths and work to implement changes to prevent such deaths in the future. Elder Fatality Review Teams are being developed across the country and interest in this resource is growing. Join us to learn about the state of Elder Fatality Review Teams, how you can create one in your jurisdiction, and the resources NAPSA provides.



### **207 - Supported Decision-Making: Maximizing Self-Determination and Safety**

*Jonathan G. Martinis, Esq., The Burton Blatt Institute at Syracuse University*

This workshop will introduce attendees to Supported Decision-Making (SDM), an alternative to guardianship where older adults and people with disabilities work with trusted friends, family members, and professionals to help them understand the situations and choices they face, so they may make their own decisions without the need for a guardian. SDM maximizes a person's self-determination, or life control. Study after study has found that people with more self-determination are more likely to be independent, employed, integrated into their communities, and safer. This session will discuss ways for APS workers to help people at risk of abuse and neglect use SDM as an alternative to guardianship and a way to maximize their self-determination, while at the same time being mindful of their personal safety and security. The session will discuss the research behind SDM, real-world examples of people using SDM, and strategies for implementing SDM for at-risk adults.

### **208 - Civil and Criminal Remedies for Abuse, Neglect, and Financial Exploitation**

*Timothy Samuelson, Wisconsin Department of Justice*

*Francis X. Sullivan, Wisconsin Department of Justice*

*Peter M. Tempelis, Wisconsin Department of Justice*

The Wisconsin Department of Justice's Medicaid Fraud Control and Elder Abuse Unit, and Consumer Protection and Antitrust Unit, will present a panel discussion to explain the mission of each of these two Units, investigations or prosecutions that may be relevant to older adults (e.g., financial exploitation, abuse or neglect in long-term care facilities), and various resources available to older adults. Among other things, DOJ staff will provide initial remarks, answer moderator-curated questions, and respond to questions from the audience.

## **WORKSHOP SESSIONS 3**

**TUESDAY 8/29/2017 | 9:00 AM - 10:30 AM**

### **301 - Recognizing and Responding to Domestic and Sexual Abuse in Later Life (Part 1)**

*Ann Turner, National Clearinghouse on Abuse in Later Life*

This workshop will use a combination of case scenarios, interactive exercises, video and lecture to enhance participants understanding of the dynamics of domestic & sexual abuse in later life. Participants will explore how historical, generational, cultural, and spiritual values impact older victims of abuse and will explore how agencies can work together to provide a collaborative, victim-centered response to abuse in later life.

### **302 - Structuring Improvement in APS: Federal Initiatives to Enhance Effectiveness of APS Programs (Part 1)**

*Mary Twomey, US Administration for Community Living (ACL)*

*Karl Urban, WRMA*

*ACL and APS Technical Assistance Resource Center Staff*

Across the country, APS is defined by diversity. The structure, policy, and practice of APS programs differ across states and local jurisdictions. Working as a catalyst for improvement, the Administration for Community Living has sponsored two projects that have prompted examination of the basic structure and approach of APS programs around the country: development of National Voluntary Consensus Guidelines for APS Systems (Guidelines) and implementation of the first national program evaluation of APS. Both projects ask: what is the ideal way to structure APS programs? The evaluation project developed the first of its kind APS Logic Model to present, in one page, the relationship between key components of APS programs. The Guidelines present in a structured format policy and practice that is considered ideal by APS stakeholders. The purpose of this session is to provide information about these two projects and engage the audience in an extended dialogue about what is ideal structure, policy and practice in APS. APS programs will be **challenged by presenters** to improve their programs; presenters will be challenged by APS programs to improve their projects.

### **Self-Neglect Track**

### **303 - The NAPSA Self-Neglect Project: Policy, Practice & Research Realities & Needs (Part 1)**

*Dr. Holly Ramsey-Klawnsnik, NAPSA*

*Trudy Gregorie, NAPSA*

*Dr. Jason Burnett, McGovern Medical School in Houston*

*William Benson, NAPSA/Health Benefits ABCs*

This session will present findings from the NAPSA Self-Neglect Project funded by the US DHHS Administration for Community Living. This national project was designed to contribute to the self-neglect evidence knowledge base and inform research, policy and practice. Enhancing existing knowledge regarding responses of APS and other programs to self-neglect and contributing to evidence-based APS policy and practice are key objectives. Our multi-disciplinary project team of the presenters listed plus Kathleen Quinn, Bill Benson, Dr. Pat Brownell, Carol Dayton, Dave Baldrige and Kendra Kuehn has utilized mixed methods to illuminate the problem of self-neglect, the volume of cases coming to APS attention, and current policies and practices regarding case assessment and intervention. Project components conducted include: (1) A systematic review of the literature published over the past 20 years within the US to identify and analyze self-neglect research including that addressing tools and scales, (2) Development of a Self-Neglect APS (SNAPS) questionnaire and conducting a national survey of APS program self-neglect policies, practices, tools used, and caseloads, and (3) Identifying innovative APS practices to respond to self-neglect and collaborations between APS programs and community agencies to prevent and remediate these cases. Findings from this first nationwide analysis of self-neglect policies, practices, and research will be presented and discussed by the project team.



### **304 - To Empower and Protect: Exploring the Realities of Responding to Abuse of People with Disabilities (Part 1)**

*Nancy Smith, Vera Institute of Justice*

*Sandra Harrell, Vera Institute of Justice*

People with disabilities are three times more likely to experience serious violent victimization than people without disabilities. For some individuals with disabilities, addressing the stark reality of violence in their lives often triggers the primary public policy response to this violence: mandatory reporting. Depending on the person, the situation, and the response, mandatory reporting can lead to beneficial or detrimental outcomes for victims/survivors. This interactive workshop will engage participants in dialogue and critical analysis about mandatory reporting and its inherent complexities and tensions between protection and empowerment of people with disabilities given their realities of violent victimization.

### **305 - APS Registries Across the Country: The Results of the NAPSA Abuse Registry Ad Hoc Committee Project**

*Nancy A. Alterio, MA Disabled Persons Protection Commission*

*Catherine Bingle, Texas Department of Family and Protective Services*

*Mariah C. Freark, MA Disabled Persons Protection Commission*

NAPSA's Abuse Registry Ad Hoc Committee formed in response to inquiries from multiple states about the need to analyze available information about states' abuse registries and study the feasibility, impact, administration, cost, and benefit of state adult abuse registries. The Committee conducted a multi-stage research process, including electronic surveys and telephone interviews, to identify the states that have abuse registries, or an information system that functions as such, and to collect information about the information contained on the registry, who has access to that information, what the information is used for, and how the registry is maintained and administered. This session will be the first presentation of the final results of the Committee's 18-month project, and will provide a general overview of registry trends across states as well as state-specific information.

### **306 - Fighting Elder Financial Exploitation through Community Networks**

*Jenefer Duane, CFPB-Office for Older Americans*

*Jon Hofacker, Age Options Inc.*

There is a growing consensus among community stakeholders, experts and practitioners that multidisciplinary community collaboration improves detection, and enhances reporting, investigation and prosecution of elder financial exploitation cases. Join us to discuss the findings of our recent study of 23 "elder financial protection networks" from around the country. We will discuss their successes and challenges in a number of areas including their activities, membership, funding and sustainability. We will discuss recent activities of an established networks in Chicago, Illinois, and new networks in Florida and Oklahoma. Participants will be engaged to share their experience and perceptions of the need for new or enhanced networks in their communities.

### **307 - Re-Framing the Issue of Elder Abuse - A New Approach**

*Julie Schoen, National Center on Elder Abuse*

*Aly Neumann, National Center on Elder Abuse*

Creating a just society includes treating older people as equal members of that society. It also means making sure we are connected to

our communities as we age, so that we can prevent and address elder abuse. By sharing services and community supports we can reduce social isolation and provide solutions. The National Center on Elder Abuse responds to hundreds of requests for information yearly. The NCEA responds to all inquiries pertaining to all forms of Elder Abuse-Financial, Physical, Sexual, Neglect and Emotional Abuse. We have various resources and responses to share with APS professionals. The NCEA has also been working with the Frameworks institute on changing the public discourse and actions pertaining to Elder Abuse. In this session we would like to provide innovations and resources to better equip APS personnel as they face these complex issues. We would also like to facilitate discussions to learn more about what is happening in the field and areas that require additional attention.

### **308 - Investing in the Future: Funding Community-wide Collaboration to Address Abuse in Later Life**

*Candace Heisler, Heisler and Associates*

*Ann Laatsch, National Clearinghouse on Abuse in Later Life*

Increasingly, APS must work across systems and with organizations which have limited experience with older adults. Building an effective community-wide response to elder abuse can be challenging due to lack of training, expertise, coordination, and resources. This workshop will provide information about a federal grant program designed to directly address these issues. For over a decade, the Department of Justice Office of Violence Against Women has provided funding to communities under the "Enhanced Training and Services to End Abuse in Later Life" program. These grants support communities in developing and sustaining a comprehensive, collaborative approach to addressing elder abuse, neglect, and exploitation. Under this program, grantee partners will train criminal justice professionals, including law enforcement and prosecutors, and will offer training to court officials, in order to better identify and serve victims of abuse, and hold offenders accountable; provide cross-training opportunities to professionals who work with older victims, including APS, aging services, and community- and system-based advocates; establish or support an existing coordinated community response to elder abuse; and provide or enhance services for victims and survivors who are 50 years of age or older. This workshop will focus on the requirements, benefits, and potential long-term outcomes of these three-year grants. The presenters are a technical assistance provider for the program, and a national expert/consultant who has worked with numerous grant communities in meeting grant requirements.

## **WORKSHOP SESSIONS 4**

**TUESDAY 8/29/2017 | 1:30 PM - 3:00 PM**

### **401 - Recognizing and Responding to Domestic and Sexual Abuse in Later Life (Part 2)**

*Ann Turner, National Clearinghouse on Abuse in Later Life*

Across the country, APS is defined by diversity. The structure, policy, and practice of APS programs differ across states and local jurisdictions. Working as a catalyst for improvement, the Administration for Community Living has sponsored two projects that have prompted examination of the basic structure and approach of APS programs around the country: development of National Voluntary Consensus Guidelines for APS Systems (Guidelines) and implementation of the first national program evaluation of APS. Both projects ask: what is the ideal way to structure APS programs? The evaluation project developed the first of its kind APS Logic Model to present, in one

page, the relationship between key components of APS programs. The Guidelines present in a structured format policy and practice that is consider ideal by APS stakeholders. The purpose of this session is to provide information about these two projects and engage the audience in an extended dialogue about what is ideal structure, policy and practice in APS. APS programs will be challenged by presenters to improve their programs; presenters will be challenged by APS programs to improve their projects.

#### **402 - Structuring Improvement in APS: Federal Initiatives to Enhance Effectiveness of APS Programs (Part 2)**

*Mary Twomey, US Administration for Community Living (ACL)*

*Karl Urban, WRMA*

*ACL and APS Technical Assistance Resource Center Staff*

Across the country, APS is defined by diversity. The structure, policy, and practice of APS programs differ across states and local jurisdictions. Working as a catalyst for improvement, the Administration for Community Living has sponsored two projects that have prompted examination of the basic structure and approach of APS programs around the country: development of National Voluntary Consensus Guidelines for APS Systems (Guidelines) and implementation of the first national program evaluation of APS. Both projects ask: what is the ideal way to structure APS programs? The evaluation project developed the first of its kind APS Logic Model to present, in one page, the relationship between key components of APS programs. The Guidelines present in a structured format policy and practice that is consider ideal by APS stakeholders. The purpose of this session is to provide information about these two projects and engage the audience in an extended dialogue about what is ideal structure, policy and practice in APS. APS programs will be challenged by presenters to improve their programs; presenters will be challenged by APS programs to improve their projects.

#### **Self-Neglect Track**

#### **403 - The NAPSA Self-Neglect Project: Policy, Practice & Research Realities & Needs (Part 2)**

*Dr. Holly Ramsey-Klawnsnik, NAPSA*

*Trudy Gregorie, NAPSA*

*Dr. Jason Burnett, McGovern Medical School in Houston*

*William Benson, NAPSA/Health Benefits ABCs*

This session will present findings from the NAPSA Self-Neglect Project funded by the US DHHS Administration for Community Living. This national project was designed to contribute to the self-neglect evidence knowledge base and inform research, policy and practice. Enhancing existing knowledge regarding responses of APS and other programs to self-neglect and contributing to evidence-based APS policy and practice are key objectives. Our multi-disciplinary project team of the presenters listed plus Andy Capehart, Kathleen Quinn, Bill Benson, Dr. Pat Brownell, Carol Dayton, Dave Baldrige and Kendra Kuehn has utilized mixed methods to illuminate the problem of self-neglect, the volume of cases coming to APS attention, and current policies and practices regarding case assessment and intervention. Project components conducted include: (1) A systematic review of the literature published over the past 20 years within the US to identify and analyze self-neglect research including that addressing tools and scales, (2) Development of a Self-Neglect APS (SNAPS) questionnaire and conducting a national survey of APS program self-neglect policies, practices, tools used, and caseloads, and (3) Identifying innovative APS practices to respond to self-neglect and collaborations between APS programs and community agencies to prevent

and remediate these cases. Findings from this first nationwide analysis of self-neglect policies, practices, and research will be presented and discussed by the project team.

#### **404 - To Empower and Protect: Exploring the Realities of Responding to Abuse of People with Disabilities (Part 2)**

*Nancy Smith, Vera Institute of Justice*

*Sandra Harrell, Vera Institute of Justice*

People with disabilities are three times more likely to experience serious violent victimization than people without disabilities. For some individuals with disabilities, addressing the stark reality of violence in their lives often triggers the primary public policy response to this violence: mandatory reporting. Depending on the person, the situation, and the response, mandatory reporting can lead to beneficial or detrimental outcomes for victims/survivors. This interactive workshop will engage participants in dialogue and critical analysis about mandatory reporting and its inherent complexities and tensions between protection and empowerment of people with disabilities given their realities of violent victimization.

#### **405 - At-Risk Adult Exploitation and Trafficking: Hiding in Plain Sight**

*Heather Strickland, Georgia Bureau of Investigation*

*Anna Ayres, Georgia Department of Human Services*

There is an emerging crime involving predators who target extremely vulnerable adults to gain access to the adults' monthly benefits and perpetrate various types of abuse, theft and fraud. These crimes target billions of dollars in state and federal funds intended to benefit the victims. The funds most often targeted are Social Security, Supplemental Nutritional Assistance Program (food stamps) and Veterans' Benefits. This presentation will present an overview of this evolving crime and strategies to identify the criminal acts, stop the fraud, neglect and abuse, address the needs of victims and build strong cases for prosecutors.

#### **406 - Financial Exploitation: It Takes a Village, A Panel Presentation**

*Ramona Dicks-Williams, MSW, APSW, Milwaukee County Department on Aging*

*Nicole Bickerstaff, BA, HSW, Milwaukee County Department on Aging*

*Dewey Martin, JD, Milwaukee County Corporation Counsel*

*Kurt Benkley, JD, Assistant District Attorney for Milwaukee County District Attorney's Office*

*Nicole Zimmer, Elder Rights Project Director*

*Eamon Guerin, Guerin Law Office*

This workshop will present and discuss the financial exploitation of an elder through using undue influence, isolation, manipulation, misrepresentation, collusion to set up a process of robbing elder of up to 3 million dollars plus her property. It will be from the perspective of the various disciplines involved including the elder abuse investigator and agency, county Corporation Counsel, the guardian of estate who was also an attorney, a private financial forensic investigator, the District Attorney's office, and one of the financial institutions involved. Each presenter will discuss their role, perspective, limitations and advantages they had in resolving this case. Also discussed will be global lessons learned, the collaborations needed, the commitment of each discipline, the realistic limitations, skills sets needed and the overall role of the APS/EA lead investigative agency in doing financial exploitation case investigation. Also there will be a facilitated opportunity to have an open discussion with audience regarding their ex-



periences with financial exploitation and the limitations of current law and statutes. Another focus will be in working with clients who are not competent and are unable to clearly articulate their directions or past decisions or understanding of what has happened to their finances and property.

#### **407 - Improving Outcomes of Sexual Assault Victims with Intellectual/Developmental Disabilities: The Massachusetts ACL Project**

*Susan Vickers, Disabled Persons Protection Commission*

*Nancy A. Alterio, Disabled Persons Protection Commission*

*Jeni Prater, Boston Area Rape Crisis Center*

*Patty Quatieri, Massachusetts Advocates Standing Strong*

The Massachusetts Disabled Persons Protection Commission (DPPC) received an ACL grant to improve the health and well-being of persons with intellectual or developmental disabilities (I/DD) who are victims of sexual assault. Persons with I/DD are highly vulnerable to sexual assault, yet the barriers to them accessing victim services are equally profound. The project has three main goals: improve and streamline access to rape crisis centers for persons with I/DD through the APS system; improve communication, information and awareness about trauma-informed services for persons with I/DD; and improve the effectiveness of sexual assault services provided to persons with I/DD through a multidisciplinary approach. During this workshop, participants will hear directly from a sexual assault survivor with I/DD about her journey, and her recommendations for other victim service providers about how to best work with her community. This session will also discuss the progress made in the grant's first year, including convening a core group of active project participants as well as a broader team of advisory partners; the creation and implementation of four regional multidisciplinary trainings; and drafting guidelines to assist rape crisis centers in serving persons with I/DD. Finally, this workshop will discuss the DPPC's sustainability plan utilizing VOCA funds to create a designated Sexual Assault Response Unit within the DPPC specifically to assist persons with disabilities in navigating through available trauma services after a sexual assault.

#### **408 - Dementia Crisis Response - Collaboration Stories From Innovative Coalitions**

*Patrick Enright, Wisconsin Department of Health Services*

*Dinah LaCaze, MBA, APSW, Milwaukee County Department on Aging*

*Cheryl Neubauer, La Crosse County Human Services*

*Paula Becker, Dodge County Human Services and Health Department*

In 2016 Wisconsin offered counties or coalitions of counties opportunity to apply for one-time funding to support collaborative efforts focused on improving response for those with dementia in crisis. Guided by the principles learned from Wisconsin's Dementia Care Redesign efforts of 2014, grantees were offered the opportunity to expand current dementia coalitions to improve understanding of procedures and resources for supporting persons with dementia in crisis, identify gaps and needs and creating local solutions to prevent crisis and improve crisis response. Grantees will share what they learned during their 18 month initiatives focusing on prevention, training strategies, policy and procedure improvements and responses to crisis that are person centered, least restrictive and prioritize stabilization-in-place whenever possible.

#### **501 - Eldercaring Coordination to the Rescue! Uncovering Family Loyalties, Secrets and Flying Accusations**

*Linda Fieldstone, M.Ed., Association for Family and Conciliation Courts*

*Sue Bronson, LCSW, Association for Conflict Resolution*

*Pamela B. Teaster, Ph.D., Center for Gerontology, Virginia Tech*

Eldercaring Coordination is a trauma-informed dispute resolution process that addresses the care and safety of elders in high conflict family situations. Eldercaring Coordination was developed by an Association for Conflict Resolution Task Force composed of 20 US/Canadian organizations, including NAPSA, conceived to fill the gap when high family conflict jeopardizes the welfare of elders. A main goal is to identify any hidden red flags for elder abuse and exploitation in complex family situations, which may include deep-rooted secrets, inappropriate expectations and obligations, loyalty conflicts, and distorted personal perceptions that make it extremely difficult to identify true elder safety concerns and find resolutions to underlying issues. Florida Adult Protective Services created a model template to link court involved cases to Eldercaring Coordination. Eldercaring Coordinators are trained to work with challenging family dynamics and disentangle unresolved issues held by family member participants. The five states piloting Eldercaring Coordination are gathering pre-post data on the focal elder, participants, judges/court administrators, and Eldercaring Coordinators. Preliminary findings from the evaluation will be presented, as well as promising practices and de-identified case studies showing ways that Eldercaring Coordinators can assist families in responding to the needs of elders and create a support system for the next generations.

#### **502 - Sexuality and Intimacy in Long Term Care**

*Julie Button, Ombudsman, CSW, WI Board on Aging & Long Term Care*

This presentation will provide participants with the knowledge to address sex and intimacy in long term care. Using a case scenario, statutes and case law, the speaker will discuss the topics of sexuality, intimacy, sex, assault and consent. Participants will learn to balance the rights of people who are able to consent to sex and intimacy, while protecting those individuals who cannot consent. Respecting diversity and focusing on assessment for consent are key elements in this workshop. Although the speaker uses Wisconsin statutes and case law, anyone should benefit from this discussion, giving people from other states ideas on what to look for in their own statutes and case law. We must embrace and honor that all people, regardless of age or abilities, are sexual beings. Open discussions about this topic are paramount in balancing rights and protection.

#### **Self-Neglect Track**

#### **503 - Self-Neglect and Tribal Elders: Collaborations with APS**

*Dave Baldrige, International Association for Indigenous Aging*

*Bill Benson, International Association for Indigenous Aging*

*Dr. Holly Ramsey-Klawnsnik, NAPSA*

*Kristin Post, Saint Regis Mohawk Tribe Adult Protection*

Older American Indians and Alaska Natives (AIANs) constitute a population that will grow substantially over the next 30 years. By 2050 the population of AIAN elders age 65 and over is expected to triple, and the oldest cohort (ages 85 and older) is projected to increase sevenfold. The complex nature of tribal, federal, state, and county relations can make serving elders experiencing self-neglect can be challenging. This workshop will provide an overview of the tribal

## **WORKSHOP SESSIONS 5**

**TUESDAY 8/29/2017 | 3:15 PM - 4:45 PM**

system and relationships with federal, state, and local governments. We will discuss current efforts, challenges, and recommended next steps. Join us for an exciting presentation on working with tribes and their elders.

#### **504 - Discovering the Truth Through Non-Confrontational Interviewing Techniques**

*Jerre B. Wortham, Texas DFPS APS Program Training Division*

*Johh J. Guzman, Jr., Wicklander-Zulawski & Associates, Inc.*

This Workshop introduces non-confrontational interviewing techniques that have been proven to improve the interviewing abilities of APS staff to better meet investigative goals of obtaining complete, relevant and truthful information. The presentation is based on a customized 5-day training course that was developed in collaboration with the Texas Department of Family and Protective Services APS Program to enhance APS investigator skills to effectively prepare and conduct structured interviews using multiple techniques and methods. It has since been presented eight times to over 250 APS investigators and staff personnel. The Texas APS program teaches multiple approaches that are critically important in building rapport, reading verbal and physical behavior, improving active listening, phrasing appropriate questions, overcoming denials and objections, and taking concise statements. The results of the training have increased the efficiency of APS investigators to effectively conduct more successful investigations that include those involving physical and sexual abuse, neglect and exploitation. Texas APS In-home caseworkers investigate allegations of abuse, neglect and exploitation of vulnerable adults in the community (e.g. private homes, adult foster homes, unlicensed board and care homes, etc.) and who are over 65 years of age, or age 18-65 with a disabling condition. APS is also responsible for investigating ANE of individuals receiving services in state operated and/or contracted settings that serve adults and children with mental illness or intellectual disabilities. Investigations are conducted in the following settings: • State supported living centers • State center • State hospitals • Community centers • Facility and community center contractors, including home and community-based waiver programs • Intermediate Care Facilities for Persons with Intellectual Disabilities (ICFs/ID) The Texas APS program includes instruction in the Wicklander-Zulawski (WZ) Non-Confrontational Method. This technique has proven to be of significant value in educating, or drawing out, information from subjects and sources. In many cases, the interviewee can be engaged in such a manner that he or she reveals information without being aware of giving away anything of value. The WZ Method is especially effective in establishing rapport, opening conversation and maintaining interaction with a subject who appears initially unwilling to provide information. The Workshop focuses on best practices related to interviewing victims, witnesses, collaterals, or alleged perpetrators with the goal of uncovering truthful information.

#### **505 - Specialization Within APS: Evaluating the Benefits and Addressing the Challenges**

*David Weinzimmer, MCP, MS, Office of the Controller, City Performance Division*

*Jill Nielsen, LCSW, San Francisco Department of Aging and Adult Services*

*Nadia Woodcock, Sonoma County Adult and Aging Services, Human Services Department*

Balancing caseload demands to effectively meet the needs of vulnerable clients, while also ensuring workload equity between staff is a challenging arena for Adult Protective Services administrators. The wide range of abuse types that APS Workers must investigate and address make it even more complicated to distribute APS casework appropriately. This workshop will explore Specialization as one approach to addressing this issue. In San Francisco, the Office of the Controller carried out a national survey that gathered data from 74 programs on the usage and benefits of specialized units within APS. Findings from this survey will be presented, as well as key highlights from a study that was conducted with the City and County of San Francisco's APS program evaluating the principle drivers of case complexity that inform business decisions around unit organization and caseload management. Sonoma County's APS program will discuss the benefits and challenges that have resulted from the creation of Financial Abuse Specialist positions that are attached to units handling investigations. Sonoma County APS has had social workers designated as financial abuse specialists since 2010. Additionally, San Francisco's APS program will provide an overview of the specialized High Risk Self-Neglect and Eviction Prevention Unit that they are currently developing.

#### **506 - Allies in Good Fight: Identification and Investigation of Abuse Against Persons with Disabilities**

*Elizabeth Dunphy Farris, Esq., Hampden District Attorney's Office*

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

*David Viens, Disabled Persons Protection Commission*

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, adult protective, 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.

#### **507 - Building Bridges - Identify Gaps and Develop Solutions for Coordination of Care Among Stakeholders**

*Ann Lamberg, State of Wisconsin DHS*

It will include a panel of APS, Managed Care Organizations, state representatives, corporate guardians and advocates. The discussion will be about identifying gaps and developing solutions for coordination of care amongst stakeholders in order to support and meet the clients needs.

#### **508 - Preparing for NAMRS: Journeys of Five County-Administered APS**

*Pi-Ju (Marian) Liu, Ph.D., University of California, San Francisco*

*Margie Aranda, Minnesota Department of Human Services*

*Doreen Goetsch, WI Office on Aging*

*Jennifer Mills, NJ Division of Aging Services*

County-administered Adult Protective Services (APS) operates the program independently at the county level, while the state only provides oversight of the statewide operation. Five county-administered APS, all at various stages in preparing for the data submission to the National Adult Maltreatment Reporting System (NAMRS), including California,



Minnesota, New Jersey, Ohio, and Wisconsin, will come together to share their experiences. Participating states are at early stages in the NAMRS journey. Some have no statewide system, or others' statewide system is not compatible with NAMRS' data submission requirements. Although challenges are not to be overlooked, the five states' NAMRS journeys have been full of opportunities and potential to enhance APS. Each state's scope of APS and key indicators/case level data system will be presented, and accomplishments as well as challenges in preparing for NAMRS will be discussed. This NAMRS alliance communicates via monthly conference calls, and states exchange information and help each other with solutions to challenges. Reflections on APS value are often discussed, and presenters will bring this conversation to the workshop. County-based APS programs also working towards collecting NAMRS data will benefit from the five states' process, and all APS programs will gain insight on NAMRS data collection. Active participation is expected from the audience, since the presenters from all five states would like to exchange experiences with other states.

justice system, techniques for case building, burdens of proof, and the role of the victim/client. Workers will practice identifying crime elements and applying information and evidence to crime elements to determine if there is sufficient proof of a crime. Crimes and case studies will focus on financial exploitation cases, including those in which the older adult has been the victim of polyvictimization.

### **603 - Assessing Decision-Making Capacity in Older Persons: Skills for Elder Justice Professionals (Part 1)**

*Adria E. Navarro, PhD, LCSW, University of Southern California*

The decision-making ability of an older adult may be influenced by the natural process of cognitive aging, capacity, and psychosocial factors. Following this workshop, helping professionals will have enhanced ability to provide functional assessments of older persons by receiving training in the use of three evidence-based assessments that inform decisional capacity. Subtle cognitive declines in executive function, episodic memory, and literacy occur even among persons without dementia (Boyle et al., 2013). As a result, normal age-related changes in decision-making capacity can increase one's risk for financial exploitation. The Institute of Medicine (2015) indicates that cognitive aging may lead to the potential for financial fraud and abuse and poor consumer decision-making, among other factors. A study of 6,159 older persons (Dong et al., 2014), age 65 and over, found that participants with greater cognitive decline had an increased risk of elder mistreatment. Because diminished decision-making ability can lead to an increased risk for abuse, particularly financial exploitation (Spreng et al., 2016), understanding the many factors relevant to decision-making ability is imperative to reducing the risk of abuse and exploitation, while maintaining and promoting autonomy among older persons. Part I will review and enhance the participants understanding of values related to serving older and dependent persons, often key in complicated cases involving questions of decision-making ability. Key terms will be explained, such as: executive function, cognition, and financial literacy. Part II will introduce and train on three evidence-based assessment tools that can inform our risk assessments and our overall ability to provide quality service to these clients that depend on us.

### **604 - Guardianship - Supportive Decision Making for the Public and APS (Part 1)**

*Michael E. Hagenlock, LCSW, LAC, Adult Protective Services - Montana*

Guardianship of the person and/or their money (Conservator) is one of the most misunderstood process and is the most severe right a person can lose; their right to make their own decisions. Guardians need help, as well as oversight. Serving as guardian is one of society's most demanding roles. "Living the life of another" or "stepping into the shoes" of the at-risk individual is no easy task. Many guardians are family members with little experience with the judicial or legal system. Other guardians are professionals or agencies, sometimes with a large caseload. In either case, guardians can benefit from help. In many cases a guardianship is not necessary, there are other alternative process to assist the vulnerable adult. Adult Protective Services (APS) responsibility is to investigate Abuse, Neglect and Exploitation. APS provides connection to resources to reduce or remove the risk of physical or mental harm that has occurred or is occurring to a person as a result of abuse, neglect, or exploitation. These services are provided to person age 60 years old or older; or adult persons who are physically or mentally disabled and adults with intellectual disabilities hereinafter referred to as vulnerable adults who are

## **WORKSHOP SESSIONS 6**

**WEDNESDAY 8/30/2017 | 9:00 AM - 10:30 AM**

### **601 - Bridging the Gap between Research and Practice Without Getting Lost (Part 1)**

*Madelyn Iris, Ph.D., Iris Associates*

*Catherine Bingle, MPA, PMP, Texas Department of Family and Protective Services, APS*

*Patti Tosti, MBA, PMP, TN Dept. of Human Services, APS*

*Pi-Ju (Marian) Liu, Ph.D., University of California, San Francisco*

Greater demands for accountability and outcomes evaluation of programs serving vulnerable adults require increased use of research inquiries and application of findings to build and expand our knowledge and use of best practices. This workshop focuses on how program staff, policy makers, and researchers can work collaboratively to improve client and program outcomes. Practitioners, program managers and researchers will discuss their perspectives regarding the value, benefits and challenges of collaborative research and describe how results have been used to enhance program effectiveness. With audience input, we will examine critical points in the adult mistreatment assessment/intervention process where data collection and analysis is most useful. Presenters will discuss principles of research design in practice settings, practical issues in collecting useful and reliable data, interpreting findings, and applying results to practice. In the second half of the workshop participants will be guided through several hands-on activities that will help them frame their own research questions, take advantage of existing data collection methods to maximize the use of already available information, strategies for incorporating new data collection activities and tools into ongoing practices, and suggestions for how to use results to inform their policies and procedures.

### **602 - Bridging the Divide: When APS and Criminal Investigations Intersect (Part 1)**

*Candace Heisler, Heisler and Associates*

APS workers increasingly investigate and handle cases in which suspected criminal conduct may have occurred. APS staff must often deal with and navigate the criminal justice system with its different rules, philosophy, and goals. A lack of understanding of these differences can lead to frustration, dissatisfaction, and conflict which ultimately may affect the client/victim. This highly interactive session is intended to increase the APS worker's understanding of the criminal

at risk of abuse, sexual abuse, neglect, or exploitation. In addition to the rising numbers of the elderly population we are also faced with increased awareness of mental illness, intellectual disabilities and military service related disabilities. With the better understanding of mental illness, intellectual disabilities and military service related disabilities this will impact the resources of each community and the need for more guardianships and/or conservatorships or is there another way?

### **Self-Neglect Track**

#### **605 - Ethics & Hoarding-“Weighing the Ethical & Practical issues - Lifestyle vs. Risk to Community Safety”**

**Paul Needham, MBA, TCS Services**

**Lisa Amador, MSW, Staff Development Hawaii**

APS workers confront a variety of ethical dilemmas in the course of their daily practice. They also may be challenged by differences in culture, beliefs, and values. Although the balancing act between self-determination and protection is at the heart of APS work, there are other sources of ethical conflict that complicate difficult case situations. Participants will learn how to identify major ethical concepts and dilemmas related to their daily practice and probe the many factors that influence the decision-making process. This workshop will first introduce the ethics behind working with any APS Client including those that Hoard, by using some of the IN-CLASS Training from the NAPSA Training Module on Ethics. The Majority of the workshop then will focus on Hoarding itself and the huge problem it can be, and ultimately Provide some insight about how best to provide services with a person who hoards.

#### **606 - The Promise of NAMRS: What We Learned in Year One**

**ACL and APS TARC Staff**

The first year of National Adult Maltreatment Reporting System (NAMRS) was a success. Overall state participation was very high and many states provided case component data. With the first year in the, um, cloud, what did we learn? This session will explore this question by engaging discussion of the following potential topics: strengths and weaknesses in the data, some of the anticipated changes in the second year, some of the key technical assistance and training issues, and how to help more states provide more comprehensive data in year 2. Most importantly, the session will provide states with an opportunity to ask questions and provide feedback to the Administration for Community Living and the APS Technical Assistance Resource Center on how make year 2 even more successful.

#### **607 - Guardianship: Is it Necessary for Positive Outcomes for Vulnerable Adults?**

**Anita Raymond, LISW, CMC, Center for Excellence in Supported Decision Making**

When working with people with cognitive, intellectual, or psychiatric challenges, professionals often consider guardianship as an effective tool to address vulnerabilities and ensure safety. This workshop will highlight the benefits and costs associated with the imposition of guardianship, from legal, practical, and ethical perspectives, as well as provide information about alternatives which can even be used with people with decision making challenges.

#### **608 - When Drinking Water and To Do Lists Aren't Enough: Stress Management through Organizational Culture**

**Christopher Dubble, Temple University Harrisburg**

This session will focus on stress in Adult Protective Services. The workshop takes a unique perspective on stress management emphasizing that individual stress management techniques are not enough to maintain professional health in the everyday life of an APS investigator. Instead, effective stress management is dependent on organizational cultures that prioritize mitigating the effects of stress. Stress on APS staff and agencies will be examined in detail with a focus on how stress harms staff and individuals served. Specifically, professional burnout, secondary traumatic stress, and compassion fatigue will be defined and explained. The theoretical framework of Psychological Capital and its constructs of Hope, Self-Efficacy, Optimism, and Resiliency will be used as the foundation for building an organizational culture that provides the necessary renewal to successfully mitigate the negative effects of stress. This session will emphasize that stress management must be a top priority of everyone in an agency to help all of us have long and healthy professional careers in APS.

## **WORKSHOP SESSIONS 7**

**WEDNESDAY 8/30/2017 | 10:45 AM - 12:15 PM**

#### **701 - Bridging the Gap between Research and Practice Without Getting Lost (Part 2)**

**Madelyn Iris, Ph.D., Iris Associates**

**Catherine Bingle, MPA, PMP, Texas Department of Family and Protective Services, APS**

**Patti Tosti, MBA, PMP, TN Dept. of Human Services, APS**

**Pi-Ju (Marian) Liu, Ph.D., University of California, San Francisco**

Greater demands for accountability and outcomes evaluation of programs serving vulnerable adults require increased use of research inquiries and application of findings to build and expand our knowledge and use of best practices. This workshop focuses on how program staff, policy makers, and researchers can work collaboratively to improve client and program outcomes. Practitioners, program managers and researchers will discuss their perspectives regarding the value, benefits and challenges of collaborative research and describe how results have been used to enhance program effectiveness. With audience input, we will examine critical points in the adult mistreatment assessment/intervention process where data collection and analysis is most useful. Presenters will discuss principles of research design in practice settings, practical issues in collecting useful and reliable data, interpreting findings, and applying results to practice. In the second half of the workshop participants will be guided through several hands-on activities that will help them frame their own research questions, take advantage of existing data collection methods to maximize the use of already available information, strategies for incorporating new data collection activities and tools into ongoing practices, and suggestions for how to use results to inform their policies and procedures.

#### **702 - Bridging the Divide: When APS and Criminal Investigations Intersect (Part 2)**

**Candace Heisler, Heisler and Associates**

APS workers increasingly investigate and handle cases in which suspected criminal conduct may have occurred. APS staff must often deal with and navigate the criminal justice system with its different rules, philosophy, and goals. A lack of understanding of these differences can lead to frustration, dissatisfaction, and conflict which ultimately may affect the client/victim. This highly interactive session is intended to increase the APS worker's understanding of the criminal justice system, techniques for case building, burdens of proof, and



the role of the victim/client. Workers will practice identifying crime elements and applying information and evidence to crime elements to determine if there is sufficient proof of a crime. Crimes and case studies will focus on financial exploitation cases, including those in which the older adult has been the victim of polyvictimization.

### **703 - Assessing Decision-Making Capacity in Older Persons: Skills for Elder Justice Professionals (Part 2)**

*Adria E. Navarro, PhD, LCSW, University of Southern California*

The decision-making ability of an older adult may be influenced by the natural process of cognitive aging, capacity, and psychosocial factors. Following this workshop, helping professionals will have enhanced ability to provide functional assessments of older persons by receiving training in the use of three evidence-based assessments that inform decisional capacity. Subtle cognitive declines in executive function, episodic memory, and literacy occur even among persons without dementia (Boyle et al., 2013). As a result, normal age-related changes in decision-making capacity can increase one's risk for financial exploitation. The Institute of Medicine (2015) indicates that cognitive aging may lead to the potential for financial fraud and abuse and poor consumer decision-making, among other factors. A study of 6,159 older persons (Dong et al., 2014), age 65 and over, found that participants with greater cognitive decline had an increased risk of elder mistreatment. Because diminished decision-making ability can lead to an increased risk for abuse, particularly financial exploitation (Spreng et al., 2016), understanding the many factors relevant to decision-making ability is imperative to reducing the risk of abuse and exploitation, while maintaining and promoting autonomy among older persons. Part I will review and enhance the participants understanding of values related to serving older and dependent persons, often key in complicated cases involving questions of decision-making ability. Key terms will be explained, such as: executive function, cognition, and financial literacy. Part II will introduce and train on three evidence-based assessment tools that can inform our risk assessments and our overall ability to provide quality service to these clients that depend on us.

### **704 - Guardianship - Supportive Decision Making for the Public and APS (Part 2)**

*Michael E. Hagenlock, LCSW, LAC, Adult Protective Services - Montana*

Guardianship of the person and/or their money (Conservator) is one of the most misunderstood process and is the most severe right a person can lose; their right to make their own decisions. Guardians need help, as well as oversight. Serving as guardian is one of society's most demanding roles. "Living the life of another" or "stepping into the shoes" of the at-risk individual is no easy task. Many guardians are family members with little experience with the judicial or legal system. Other guardians are professionals or agencies, sometimes with a large caseload. In either case, guardians can benefit from help. In many cases a guardianship is not necessary, there are other alternative process to assist the vulnerable adult. Adult Protective Services (APS) responsibility is to investigate Abuse, Neglect and Exploitation. APS provides connection to resources to reduce or remove the risk of physical or mental harm that has occurred or is occurring to a person as a result of abuse, neglect, or exploitation. These services are provided to person age 60 years old or older; or adult persons who are physically or mentally disabled and adults with intellectual disabilities hereinafter referred to as vulnerable adults who are at risk of abuse, sexual abuse, neglect, or exploitation. In addition to

the rising numbers of the elderly population we are also faced with increased awareness of mental illness, intellectual disabilities and military service related disabilities. With the better understanding of mental illness, intellectual disabilities and military service related disabilities this will impact the resources of each community and the need for more guardianships and/or conservatorships or is there another way?

### **Self-Neglect Track**

### **705 - Elder Self-Neglect: A Review of 20 Years of the TEAM Institute Research**

*Jason Burnett, UT Health, Houston McGovern Medical School*

This review will cover the history and evolution of elder self-neglect research from the TEAM Institute and future research endeavors based on the needs of the field.

### **706 - The Road to Retirement: Understanding the Basics and Avoiding Costly Financial Mistakes**

*Lara Hinz, MSW, Women's Institute for a Secure Retirement (WISER)*

*Linda K. Stone, FSA, Society of Actuaries & WISER Senior Fellow*

Workers today have a great deal of responsibility for planning their own retirement. Living much longer than their parents' generation, today's retirees are also spending more time in retirement than in the years planning for it. Women are especially vulnerable to this longevity risk and can least afford to make financial mistakes. This workshop will provide attendees with a basic understanding of the different sources of retirement income and other programs that provide the foundation for retirement security. Participants will learn techniques for helping their clients, as well as themselves, identify and maximize those sources as income. Special focus will be placed on understanding and avoiding costly mistakes related to Social Security and Medicare.

### **707 - Effective Interviewing – Clients with Mental Illness and Intellectual Developmental Disabilities**

*Lesley L. Williams, Center for Learning and Organizational Excellence*

*Amanda Notto, Center for Learning and Organizational Excellence*

During this workshop, we will discuss "Effective Client Interviewing." A client can be anyone who is over or under the age of 65 who has been diagnosed with a mental illness or intellectual/developmental disability. Come prepared to learn about dynamics and how these risk factors can contribute to Abuse, Neglect, and Exploitation of the people we are set forth to protect. Focus will be on basic skills for interviewing clients who are verbal and non-communicative. Overcome common obstacles in communication while recognizing how self-awareness may influence the interview.

### **708 - The Practical Application of Ethical Considerations in APS Casework**

*Alan Lawitz, J.D., Bureau of Adult Services of the New York State Office of Children and Family Services (OCFS)*

*Lori Delagrammatikas, MSW, California Department of Social Services*

As social workers, we learn the basic ethical principles of good social work. The problem is, things aren't as clear cut when working real cases. In this class, we will explore the real life ethical dilemmas that come up every day in APS cases. We will tease apart the different issues involved in these situations using an ethical framework and learn to provide a well-reasoned argument for our case decisions. Come ready to dig in and debate some tough issues!

# WORKSHOP SESSIONS 8

WEDNESDAY 8/30/2017 | 3:00 PM - 4:30 PM

## **801 - Making Your Voice Heard Nationally**

*NAPSA Regional Representative Advisory Board*

*Lee Ann Kelly-Christenson, Florida Adult Protective Services*

The NAPSA Regional Representatives want to hear from you in this interactive workshop, exploring the issues you face when addressing elder and vulnerable adult abuse in your communities. What are your biggest stumbling blocks? What tools do you need? How might the regional representatives advocate for you and your programs? Is there something NAPSA has done in the past that you want more of (webinars, research briefs, legislative analysis, regional calls)? Come and let us know your needs and your wants! We want to hear from you.

## **802- Building Effective Adult Fatality Review Teams in Illinois Through Adult Protective Services**

*Jon Hofacker, AgeOptions*

*Holly Zielke, Illinois Department on Aging*

Adult Fatality Review Teams are a relatively recent development in Adult Protective Services, but are rapidly growing in number across the country. These Adult Review Teams follow a similar structure as the long-established Child Fatality Review Teams, but there are also significant differences between the two types of teams and implications in practice. Embedded into the State of Illinois' Adult Protective Services Act, members include representatives from the States Attorney Office, coroner/medical examiner, public guardian, public health department, health and hospital systems, and non-profit advocates. This workshop will describe the development of one such team in Suburban Cook County Illinois, and its efforts to (1) reduce the number of at-risk adult deaths caused by abuse and neglect, (2) improve the investigations of deaths of at-risk adults and (3) increase prosecutions of offenders when appropriate. Through this team, the power of case studies and individual narratives are utilized to empower a multidisciplinary team of professionals to evaluate appropriate prevention efforts, public policy, and systemic changes.

## **803 - Confidentiality: Path to Better Outcomes or Detour Along the Road to Elder Justice?**

*Colleen Beach, School of Social Work, Monmouth University*

*Jennifer Mills, MSW, Division of Aging Services, New Jersey Department of Human Services*

We know that confidentiality is a critical part of the laws we must follow in APS, but often we wonder if it is a help or hindrance to the ultimate goal of the work we do. Our clients rely upon us to respect their privacy and right to self-determination, but the reality is we can't do it alone. We rely on our community partners to work with us and share information that will help us help them. They expect the same of APS. Where is the line between sharing information and respecting the strict rules of confidentiality? In this interactive workshop participants will discuss the responsibility we have to follow the confidentiality laws, share the challenges we face when trying to do so, and brainstorm together about solutions to the challenges we face.

## **804 - Creating a Coordinated Response Among Tennessee State Agencies**

*Patti Tosti, MBA, PMP, TN Dept. of Human Services*

*Renee Bouchillon, MA, APS, TN Dept. of Human Services*

In Tennessee, the Department of Human Services' Adult Protective Services (APS) Program investigates allegations of abuse, neglect (including self-neglect), and financial exploitation of vulnerable adults. Like most states, there are many different state agencies providing investigations and services to vulnerable adults but there is no formalized structure or framework. This type of absence creates a confusing and fragmented system that produces gaps in services, duplication of processes and multiple points of entry. Meeting the needs of vulnerable adults becomes difficult, costly, and inefficient to all the state agencies participating in this type of system. In recent years, Tennessee has made some improvements to decrease fragmentation but many more are needed among state agencies. Tennessee's investigation, response, and service delivery to vulnerable adults in need of protection would substantially benefit from increased communication, coordination, and collaboration. In 2016, Tennessee Adult Protective Services was awarded the ACL grant to lead a coordinated community response (CCR) amongst state agencies. The purpose of this task is to create a seamless flow of protective services and enhanced data collection with national data collection efforts. This workshop proposal will focus on the processes needed to initiate a statewide CCR to include:

- The determination and engagement of stakeholders on the front end,
- The creation of a shared vision via the development of a Key Driver Diagram to sustain the stakeholders, and
- The mapping of existing state and federally funded programs available to protect vulnerable adults.

This workshop creates a step-by-step process at the initial stages; keeping in mind that the first steps of any new project can be overwhelming and challenging. This hands-on, process-oriented, workshop will offer participants detailed strategies and advice to work more collaboratively with other agencies at a community or statewide level and move more quickly to obtain their goals.

## **805 - Creating Pathways to Justice for Victims with Disabilities: A Community-Driven Approach**

*Leigh Ann Davis, The Arc*

*Mark Starford, The Board Resource Center*

Crime victims with intellectual and developmental disabilities require support in order to fully participate in the justice system. The National Crime Victim Survey reveals that people with disabilities are 2 to 3 times more likely to be victims of crime, and yet the systems we have in place do not typically provide the understanding about disability or accommodations needed to fully address the needs of this population. The Arc's National Center on Criminal Justice and Disability is working to change this by working with disability advocates nationwide to create Disability Response Teams, which includes victim service professionals. Participants will learn about Disability Response Teams, the Pathways to Justice training being used by the teams, and learn how to implement the training in their communities. Participants will also learn about other projects by The Center that addresses crime victims with disabilities.

## **806 - Facilitating Prosecution- Best Practices for Investigating Financial Exploitation**

*Richard Albrecht, MS, Institute on Protective Services at Temple University*

This workshop will discuss the various tools available to protective services staff, law enforcement and prosecutors when dealing with cases of financial exploitation or theft of a vulnerable adult. This workshop will cover 3 aspects of investigating financial exploitation when criminal referral is possible. This workshop will cover the importance of gathering relevant evidence, analyzing and organizing the evidence and finally creating a professional presentation of the





**Hey NAPSA participants. Looking for something fun to do when you are in Milwaukee? How about taking in a Milwaukee Brewer Game at the beautiful Miller Park?**

The Brewer's take on the Saint Louis Cardinals on August 29<sup>th</sup> at 6:40 PM. The Brewers have generously given NAPSA a discounted group rate. You can access and pay for your tickets at the following link:

**<https://groupmatics.events/event/Napsa17>**

Getting to the event will be made very easy by taking a free shuttle to the game from a local (and within walking distance) bar and restaurant! Come and join the fun!

Look for details of available shuttles at the registration table!



## Welcome Reception

All conference attendees, speakers and sponsors are invited to an opening reception. Come and network, catch-up with colleagues and relax.

**Appetizers | Cash Bar | Music**

**Monday August 28, 2017**

**6:00 PM - 8:00 PM**

**Hilton City Center | Milwaukee, WI**



# FREQUENTLY ASKED QUESTIONS

## **Q: Who should attend the NAPSA Conference or the Elder Financial Exploitation Summit?**

A: The conference will benefit anyone who works with adults with disabilities and older adults or who manages a program that comes into contact with these populations. The summit will be of particular interest to those who come into contact with older adult victims of financial exploitation.

## **Q: How many people attend the conference and summit?**

A: Our conference draws approximately 600 attendees each year and the Summit on Elder Financial Exploitation draws approximately 250.

## **Q: Is there a special NAPSA conference lodging room rate? Why don't I see it anywhere on this brochure?**

A: Yes there is! Unfortunately, we are not permitted to advertise this rate, but you can see it when [making a reservation](#) for the event. This cost is the [US General Services Administration rate for Milwaukee](#) (plus tax).

## **Q: Can I get the conference lodging rate for the weekend before or after the event?**

A: Yes, the hotel will make a block of rooms available for these days on a first come, first come basis. They may fill up fast, so the sooner you make the reservation, the better!

## **Q: Is the 8th Annual Elder Financial Exploitation Summit included in the conference registration fee?**

A: It is not, sorry. There is a separate fee for this event. The fee is \$150.

## **Q: Are there sponsorship opportunities?**

A: Yes, there are! Please visit [www.napsa-now.org/conference](http://www.napsa-now.org/conference) to see details about sponsorship.

## **Q: Where will the conference be next year?**

A: Write to us at [www.napsa-now.org/contact](http://www.napsa-now.org/contact) and ask to be placed on the annual conference information list and you'll be one of the first to know when it's announced!

## **Q: Will there be continuing education units available?**

A: Yes! We will be offering continuing education at the cost of \$15.00 per certificate. Please select the option for CEUs during your registration.

## **Q: I'm not sure if I'm a member or not. How do I find out?**

A: Contact Carol Carlton at [www.napsa-now.org/contact](http://www.napsa-now.org/contact).

## **Q: I can't find the registration code that I need to use.**

A: The member registration code will be sent via email to all current members. If you've misplaced it, contact Carol Carlton at [www.napsa-now.org/contact](http://www.napsa-now.org/contact).

## **Q: When does the price go up for registration?**

A: The early registration fee is good through Tuesday, August 1, 2017 at 12:00 AM ET.

## **Q: Are any meals provided at the conference?**

A: Continental breakfast is included in your registration price for the morning of Tues. and Wed. of the conference and at the Summit. Lunch is provided on Wednesday August 30, 2017 and at the Summit.

## **Q: Will there be handouts for each workshop?**

A: Not necessarily. NAPSA has **gone green** and does not print handouts, although some speakers do bring handouts with them. Most conference materials will be posted to a password protected section of the NAPSA website if you wish to print materials.

## **Q: Can I volunteer at the conference for a discount?**

A: All volunteer slots are filled by existing Conference Committee members, who also pay full price. Sorry, we do not have volunteer positions in exchange for reduced registration fees.

## **Q: Don't I have to sign up for specific workshops at registration and attend those I picked?**

A: No. We will make all the information available about the workshops. You may attend any workshop you wish at the conference, but spaces are first come, first served.