



*26th Annual National Adult Protective Services Association Conference*

# **APS: Providing Help and Hope to Vulnerable Adults**

SEPTEMBER 29 - OCTOBER 1, 2015

*Conference Partner*

**Florida Department of Children and Families, Adult Protective Services**

ROSEN PLAZA HOTEL | ORLANDO, FLORIDA

**[WWW.NAPSA-NOW.ORG/CONFERENCE](http://WWW.NAPSA-NOW.ORG/CONFERENCE)**



# ROSEN PLAZA HOTEL

Rest Assured.®



## HOST HOTEL

Ideally located on Orlando's International Drive, Rosen Plaza Hotel is adjacent to the Orange County Convention Center and across the street from the Pointe Orlando shopping and entertainment complex. Our expert staff, well-appointed accommodations and state-of-the-art facilities make our hotel Central Florida's premier meetings destination. Featuring 800 deluxe guestrooms, 32 luxurious suites, complimentary Internet, dry cleaning and a business center, Orlando's Rosen Plaza Hotel goes beyond being just a Florida meetings destination. Less than 10 miles from major attractions Walt Disney World and Universal Studios.

***Reserve your room now! Online reservations link available at***

***[www.napsa-now.org/conference](http://www.napsa-now.org/conference)***



# Conference Schedule At-A-Glance

## Monday September 28, 2015

9:00 AM—5:00 PM	NAPSA Board of Directors Meeting
-----------------	----------------------------------

## Tuesday September 29, 2015

1:00 PM—2:30 PM	Workshop Sessions I
-----------------	---------------------

2:45 PM—4:15 PM	Workshop Sessions II
-----------------	----------------------

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

## Wednesday September 30, 2015

9:00 AM—10:00 AM	Welcome and Opening Remarks
------------------	-----------------------------

10:15 AM—11:45 AM	Workshop Sessions III
-------------------	-----------------------

11:45 AM—1:00 PM	Lunch Break
------------------	-------------

1:00 PM—2:00 PM	General Session I
-----------------	-------------------

2:15 PM—3:45 PM	Workshop Sessions IV
-----------------	----------------------

4:00 PM—5:30 PM	Workshop Sessions V
-----------------	---------------------

## Thursday October 1, 2015

9:00 AM—10:30 AM	Workshop Sessions VI
------------------	----------------------

10:45 AM—12:15 PM	Workshop Sessions VII
-------------------	-----------------------

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

1:45 PM—2:45 PM	General Session II
-----------------	--------------------

3:00 PM—4:30 PM	Workshop Sessions VIII
-----------------	------------------------

4:30 PM—5:30 PM	Closing Remarks
-----------------	-----------------

## Friday October 2, 2015

9:00 AM—5:00 PM	6th Annual Summit on Elder Financial Exploitation
-----------------	---

# Registration Fees

Florida Adult Protective Services Staff	\$375
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 September 1, 2015 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:*

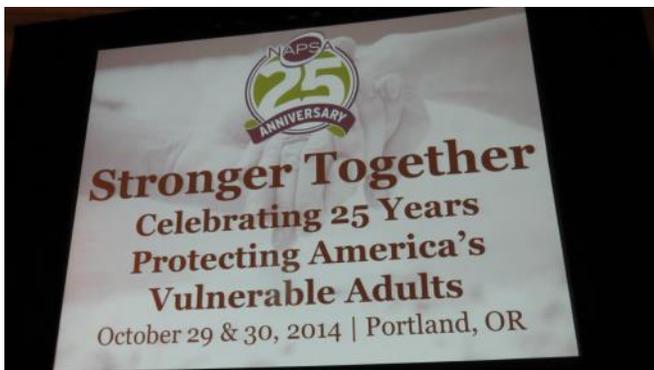
**Conference Registration Discount**

**Monthly Newsletter**

**[Member Listserv](#)**

**[Networking Opportunities](#)**

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



## Workshop Themes

**NAPSA is pleased to highlight certain workshops this year.**

**Workshops with blue text may be of particular interest to professionals who work with adults with a disability.**

**Workshops in green text indicate ones that may be of interest to nurses.**

## Workshop Sessions I

**Tuesday September 29, 2015 1:00 PM - 2:30 PM**

### 101 - **The Intersection of Stalking and Elder Abuse**

Elena Roberts, Stalking Resource Center

Shelly Fox, National Clearinghouse on Abuse in Later Life

The National Clearinghouse on Abuse in Later Life (NCALL) and the Stalking Resource Center (SRC) propose to give an educational workshop on the intersection of elder abuse and stalking. While elder abuse is a frequently discussed topic in the APS community, the role of stalking in elder abuse is rarely discussed. This workshop aims to provide an introductory overview of stalking behaviors for APS workers, including: An introduction to stalking behavior: What it is (legal/statutory framework), how often it occurs (statistical prevalence), what it looks like (behavioral cues). A discussion of how stalking specifically presents in elder and vulnerable adult abuse cases, particularly with reference to domestic violence and financial exploitation cases. What APS workers can do to help: learning to identify potential stalking behaviors; working with law enforcement and/or civil attorneys to document and potentially prosecute stalking of elder and vulnerable adults. Following the lecture-based presentation, trainers will conduct an interactive exercise in which participants will be asked to review a fictional case scenario that contains elements of both elder abuse and stalking behaviors. Participants will develop a short written statement for submission to APS or law enforcement that documents the behaviors of concern. NCALL and SRC trainers will review the participant statements and offer participants feedback/coaching on their work.

### 102 - **Using the APS SDM® Model in the Context of NAPSA's APS Program Standards**

Julie Phelps, National Council on Crime and Delinquency

Sue Gramling, National Council on Crime and Delinquency

This presentation will provide participants with information about the evidence-based Structured Decision Making® (SDM) decision-support model to help practitioners and agencies serve elderly and adult clients. The SDM® system for adult protective services (APS) is a set of assessments used at critical decision points in an APS case. Discussion will include a review of the NAPSA standards, an overview of the SDM for APS system assessments and policies, and specific examples of how use of the SDM system meets or exceeds the NAPSA standards.

### 103 - **Working in Multigenerational Teams**

Denise Hunter, Florida Department of Children & Families

Jeff Mclemore, Florida Department of Children & Families

Shelley Kimrey, Florida Department of Children & Families

This informative, thought provoking, interactive session explores the 4 generations in the workforce with a focus on valuing their differences and leveraging their strengths to aid in team building, improve communication, and boost employee engagement.

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

Jennifer Edwards-Hawkins, Disabled Persons Protection Commission

Anne Monti, Building Partnerships Initiative

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. Through examination and discussion of these training materials, participants will acquire the necessary understanding to create their own materials. Workshop includes participation in various interactive and enlightening activities designed to acquire knowledge about the effectiveness of the various curricula. Materials shown will be available to participants.

### 105 - **A New Tool for Assessing Financial Decision Making Abilities in Older Adults**

Peter Lichtenberg, Ph.D., Wayne State University

In assessing financial decision making, APS professionals must use an approach that balances the desire to protect older adults with the need to enhance autonomy where possible. It is critical, therefore, that valid and reliable tools be available to adequately assess specific financial decision-making abilities, especially as they apply to "sentinel financial transactions," which are defined as transactions that can result in significant losses or harmful consequences. Appelbaum and Grisso (1988) elaborate on the intellectual factors involved in decision making assessment: choice, understanding, appreciation, and reasoning. First, the older adult must be capable of clearly communicating his or her choice. Understanding is the ability to comprehend the nature of the proposed decision and demonstrate awareness of its risks and benefits. Appreciation refers to the situation and its consequences, and often involves their impact on both the older adult and others. Lichtenberg and colleagues (2014) published a new tool to assess the financial decision making abilities of older adults. From that larger scale a 10-item screening scale was created. This screening scale was used in a pilot study with APS workers in Michigan and with a group of other types of professionals who work with older adults making significant financial transactions or decisions. An ongoing 2-year data collection with APS workers is now underway in Michigan. This workshop will present the background for the scale, the scale itself, training to use the scale and case examples to illustrate the scale's usage.

### 106 - **APS & Police Investigations**

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 has not traditionally worked together. As a result, the victim interviewed numerous times. The collaboration between members of Montgomery County Adult Protective Services and the Montgomery County Police Department 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.

#### 107 - **Mandatory Reporting: What Policy Yields Strong Outcomes**

Michael Splaine, Splaine Consulting for NCEA

We have conducted an analysis of state mandatory reporting laws to identify what elements in the laws and/or their application create the strongest outcomes on behalf of the National Center for Elder Abuse. This workshop will showcase those results.

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

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 deescalate threatening, hostile, or angry people.

## Workshop Sessions II

Tuesday September 29, 2015 2:45 PM - 4:15 PM

#### 201 - **Improving APS Secondary Violence Prevention Efforts: The Work of the National Adult Protective Services Resource Center**

National Adult Protective Services Resource Center Staff  
Improving APS Secondary Violence Prevention Efforts: The Work of the National Adult Protective Services Resource Center The National Adult Protective Services Resource Center (RC) is in the second year of its second grant cycle. Funded by the Administration for Community Living, Administration on Aging, U.S. department of Health and Human Services, its mission is to enhance the quality, consistency, and effectiveness of elder abuse secondary prevention conducted by APS nationwide. This session will inform participants of the projects undertaken and the products produced to assist APS professionals in working effectively with victims to prevent the recurrence of abuse, neglect, and exploitation in their lives. Among the APS challenges that have been addressed by the RC in the current grant period are caseload management, assessing capacity to consent, working effectively with law enforcement and prosecutors, worker safety, evidence-based and innovative APS practices, vulnerable adult abuse as a public health issue, investigation protocols and interviewing strategies, balancing victim safety and empowerment with alleged perpetrator rights and registry issues, responding to cases involving mental health problems, creating and utilizing staff training resources, and supervision issues. Please join members of the RC TA team to learn about the work of the center and the TA products available, discuss your TA needs, and network regarding successfully meeting the complex challenges of violence prevention in the lives of APS clients.

#### 202 - **How to Get Involved with NAPSA's Regional Representatives To Enhance APS Nationally and Locally**

Nyla McCarthy, Chair of Regional Representatives Advisory Board and NAPSA President-Elect

Alan Lawitz, NAPSA Regional Co-Representative, Northeast II and Director, Bureau of Adult Services, New York State Office of Children

#### & Family Services

Barbara Pastirik, NAPSA Regional Co-Representative, Southeast and APS Program Administrator for Georgia

Karl Urban, NAPSA Regional Representative, Southwest and Director, Performance and Policy Development, APS, Texas Dept of Family and Protective Services

Would you like to contribute to our national movement to improve the lives of vulnerable elderly and disabled adults? This workshop will discuss the new role of NAPSA's Regional Representatives and how you can get involved in the great range of activities NAPSA offers. We will also discuss the 2015 NAPSA Membership Survey, emerging trends and challenges facing NAPSA members and how NAPSA can help its members in serving vulnerable adults in their communities. The workshop will identify specific opportunities for members to contribute their talents to these efforts.

#### 203 - **Federal Voluntary Guidelines for APS**

Mary Twomey, Administration for Community Living

Stephanie Whittier Eliason, Administration for Community Living

The Administration for Community Living plans to release voluntary guidelines to the states on Adult Protective Services programs in 2016. In this workshop, staff from ACL will discuss the goals of this guidance, the process for creating the guidance and will review the guidelines themselves. Opportunities for attendees to give feedback on the guidelines will be provided.

#### 204 - **"The Aging Process" / NAPSA Core Module Demonstration**

Steve Field, Field Training and Consulting Services

Paul Needham, Oklahoma DHS/APS

This workshop will be short on lecture and long on discussion, demonstration and interactive exercises. In this workshop two experienced APS trainers will demonstrate in an interactive format the NAPSA Core Competency Module on "The Aging Process". It is our belief that APS Training of all kind can be and should be a fun interactive experience. The workshop will have two additional benefits. One is to continue to HIGHLIGHT availability of the NAPSA Core Competency Modules, and second emphasize NAPSA's commitment to providing low cost or no cost training to the State and local APS programs across the country.

#### 205 - **Suspicious Deaths: Beyond Age and Disease**

Pat King, RN, GA Division of Aging Services

Chevas Yeoman, GA Division of Aging Services

Advanced age and pre-existing conditions should not be the only considerations in determining cause and manner of death. This presentation will look at elder death investigations through the lens of a multiple disciplines. Nationally, states and municipalities using Elder Death Review Teams in an effort to answer the question, "Should this individual have died at this time in this manner?". This presentation will provide an overview of a new approach to death investigations of older adults and adults with disabilities.

#### 206 - **Finding Your Path to Resiliency: The Effects of Vicarious Trauma in Adult Protective Services**

Trudy Gregorie, NCPEA

Working in systems that respond to elder abuse can be stressful. In adult protective services, frustrations and stress abound and professionals often must set their own limits. Working closely with traumatized older adults can also have an emotional and psychological impact for an APS professional due to the second-hand exposure to trauma, multiplied case after case, client after client. Vicarious trauma

ma is an occupational hazard for those who serve, treat or represent victims of elder abuse and may affect an individual professional in profound ways. This presentation defines the experience of secondary trauma and its implications for those professionals who work within adult protective services. A theoretical framework for examining the impact of vicarious traumatization (VT) is presented, as well as methods for staff to assess the impact of VT on themselves and colleagues. Upon completion of this workshop, participants will be able to: 1) describe the nature of vicarious traumatization; 1) discuss the professional and personal impact of vicarious traumatization; 3) identify signs of vicarious traumatization; and 4) describe strategies for addressing vicarious traumatization.

### **207 - Skill Building - A New Approach to Addressing Hoarding and Cluttering Behaviors Among APS Clients**

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

Sara Stratton, LCSW, City and County of San Francisco, Department of Aging and Adult Services

Hoarding and cluttering behaviors place many APS clients at high risk for health and safety problems as well as eviction. The City and County of San Francisco's APS program recently dedicated 18 months to testing out a new method of addressing these behaviors and evaluating the effectiveness of the intervention techniques.

San Francisco was one of four locations nationwide to pilot the Hoarding Intervention and Tenancy Preservation Project (HITPP) that was developed by the Metropolitan Boston Housing Partnership. The HITPP model utilizes a harm reduction approach that relies on three primary strategies for intervention: developing and maintaining insight and motivation; teaching skills to sort and discard items; and promoting teamwork between the client, social worker and others involved in the case. In collaboration with the Mental Health Association of San Francisco's Hoarding and Cluttering Institute and a local expert and researcher in the field, SF APS carried out an in-depth evaluation of the outcomes that were produced from the pilot. This workshop will review the findings from this pilot project highlighting those skills, strategies, and knowledge points that can be applied broadly to APS clients.

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

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

## **Workshop Sessions III**

**Wednesday September 30, 2015 10:15 AM - 11:45 AM**

### **301 - Effective Interviewing - Clients with Mental Illness and Intellectual/Developmental Disabilities**

Christy Ashworth, TX DFPS APS Provider Investigations

Jerre B. Wortham, Texas DFPS Center for Learning and Organizational Excellence

We will discuss "Effective Client Interviewing." 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. Focus will be on basic skills for interviewing clients who are verbal and non-communicative and how to overcome common obstacles in communication. We will also explore how Texas APS collaborates with the Forensic Assessment Network Center (FACN) and Child Advocacy Center (CAC) on specific cases.

### **302 - A Criminal Justice Response to Abuse or Crimes Committed Against Persons with Disabilities**

Elizabeth Dunphy Farris, Hampden District Attorney (MA)

Nancy Alterio, Disabled Persons Protection Commission (MA)

A Criminal Justice Response to Abuse or Crimes Committed Against Persons with Disabilities: Examining the Nuts and Bolts of a "Successful" BPI-based Prosecution, introduces participants, with the use of case studies and a team exercise, to the Massachusetts Building Partnerships for the Protection of Persons with Disabilities Initiative (BPI). 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. When working together, crimes committed against persons with disabilities can be successfully recognized, reported, investigated and prosecuted. BPI is a prosecutor-based multidisciplinary model of investigation for the reports of abuse or crimes committed against persons with disabilities. At its core, BPI operates pursuant to an MOU between key stakeholders with statutory oversight to the report, investigation and prosecution of abuse or crimes committed against persons with disabilities. The creation of a single initial reporting point of entry and the linking of law enforcement and human services investigators with prosecutors in the immediate aftermath of the report provides for key decisions to be made regarding victim safety and evidence preservation in the critical stages of the investigation.

### **303 - A Collaborative Response to Abuse in Later Life (the Family Justice Center Model)**

Ashley Carroll, MSW, A Safe Place Family Justice Center

JR Oleyar, A Safe Place - Oregon DHS Adult Protective Services

Amy Doud, A Safe Place - Clackamas Women's Services

Elder abuse looks different in each situation--and so should our response. A collaborative response to the abuse of older adults includes partnership between Adult Protective Services, law enforcement, courts, victim service providers, governmental agencies and non-profits. The Family Justice Center model brings these entities together under one roof to improve and leverage services while increasing efficiency and accessibility. Collectively viewing these cases within their context of power and control dynamics and through the "survivor-centered" lens of the domestic violence field has helped to

address the manipulation tactics and resulting fear that often hinders both victim safety and offender accountability.

### **304 - Best B.E.T.s (Basic Essential Tips for new APS Trainers and Supervisors)**

Paul Needham - MBA, Oklahoma DHS/APS

Steve Field, Field Training and Consulting Services

Essential Training for New Trainers/supervisors wanting to build their training techniques and skills in presentation, transfer of learning, technical aides, and practical aides on any subject matter, lecture, discussion, Co-trained by two experienced trainers, numerous interactive exercises and demonstrations of classroom tools will be utilized. This workshop will be short on lecture and long on discussion, demonstration and interactive exercise. It is an introduction to some basic training adult learning theory quickly transitioning into providing some of the best quick tips learned over the past 15 years by two professional SME's (Subject Mater Experts in APS) who have become professional trainers in their field of Adult Protective Services. This work shop is an essentials workshop for new trainers/supervisors. Experienced trainers, knowledgeable in the areas of Transfer of Learning and Adult Learning Theory may get a few tips or reminders, but certainly would already know much of what is being presented, albeit it in possibly a new way.

### **305 - Home Sweet Care Home- Care and Crime in Unlicensed Care Homes Stabilizing the Care Home Environment**

Douglas J Anders, Houston Police Department, Mental Health Division

Ann Macleod, LPC-S, NCC , MHMRA of Harris County

Discussion of Care and Crime issues in small unlicensed care homes within communities. With the aging of the population and high cost of care for elderly and disabled small care homes are an economic necessity. The City of Houston passed local regulation of Unlicensed Care Homes. A small unit within the Houston Police Department, Mental Health Division is tasked with regulation and investigation of these small Care Homes. Officers routinely investigate abuse, neglect, financial exploitation, illegal restraint, and assist other agencies in investigation of Medicare/ Medicaid fraud. The passing of the ordinance and the development of the Boarding Home Investigations Unit has served as a catalyst to seek development for a Senior Justice Assessment Center involving interagency cooperation. The Justice Center will coordinate investigation between state agencies, district attorney, and local law enforcement for victims with cognitive impairment and the elderly.

### **306 - Invisible Population: Outreach, Assessment and Intervention Strategies with Older Battered Women**

Dr. Ronald Dolon, Ball State University

Over the years, women who are battered and elder abuse have been treated as separate problems; however, lately there has been collaboration between elder abuse and domestic violence professionals with regard to reporting, intervention, and assistance to the older battered woman. Practitioners who work with older adults are in a unique position to identify and address the needs of older victims of abuse. By recognizing the dynamics of abuse in later life, practitioners can respond by offering services that support and improve the lives of the victims. Collaboration with other service providers with experience in abuse and aging is critical. Older battered women often have nowhere to turn and do not know what kind of help is available. Practitioners have a crucial role to play in abuse in later life cases. This presentation will focus on the following topics: Inter-

ventions, the dynamics and consequences of abuse in later life, safety strategies, and multidisciplinary responses to older battered women.

### **307 - Building (More) Bridges between the Fields of Victim Services and Adult Protective Services**

Shelly L. Jackson, PhD, Office for Victims of Crime, USDOJ

There exists a long and rancorous relationship between adult protective services (APS) and victim services broadly defined. The two fields have developed independently of one another, rarely cross paths, and are suspicious of one another. Some of this rancor is based on their historical roots and philosophical differences, and some of it stems from misunderstandings between the two fields. Believing that differences can only be overcome if they are identified and faced, this workshop will describe the ways in which the fields of APS and victim services are similar and different and will identify ways in which the two fields can collaborate and be mutually beneficial to one another.

### **308 - Monitoring Guardianship Fraud in Ground Zero**

Anthony Palmieri, Clerk and Comptroller Palm Beach Co. Division of Inspector General

Honorable Sharon R. Bock, Esq., Clerk and Comptroller Palm Beach Co. Division of Inspector General

As our nation's population continues to age, the importance of independent monitoring of guardianship grows as well. Monitoring is critical to protecting society's most vulnerable individuals—older individuals with dementia, younger individuals with disabilities, and minors. The Clerk & Comptroller, Palm Beach County's Division of Inspector General team performs highly specialized, in-depth audits and investigations of guardianships. Florida is fortunate to have many excellent guardians -- professionals, corporations and family members -- who do great work on behalf of vulnerable individuals. The Inspector General team helps to protect Floridians from those who don't have the individual's best interests at heart and, if unchecked, could do irreparable financial harm. The guardianship fraud programs throughout Florida seeks to protect vulnerable individuals with combined assets of approximately \$4-6 billion. This session will highlight the Clerk & Comptroller, Palm Beach County's monitoring program. It is no secret – with over 3.4 million persons over 65 years of age, Florida has a large senior population. From the Panhandle to the Keys, there are an estimated 500,000 older persons with Alzheimer's type dementia. With more than 100,000 persons over 80 years of age, Palm Beach County is considered "ground zero" for the aging of the nation. As a result, the county faces many age-related issues. In the mid-2000's, the Clerk & Comptroller's office started actively tracking guardianships and discovered a growing trend of open guardianship cases. In addition to a case load of more than 2,700 open cases, there were approximately 400 new guardianship cases filed each year – a rate that far outpaced the number of closed guardianship cases.

## **Workshop Sessions IV**

**Wednesday September 30, 2015 2:15 PM - 3:45 PM**

### **401 - You Can Count on it. A Case Study in Data Governance and Improving Confidence in Your Data**

Denise Brinkmeyer, JUMP Technology Services

As Adult Protective Services programs grapple with meeting an increasing demand for accurate and timely reporting at multiple levels, they may struggle with reliable information. Without a formal strategy, these efforts may seem like "herding cats." Data governance is a methodology for increasing consistency and confidence while decreasing the risk of exposure and penalty. Data governance will optimize staff effectiveness and enable better planning. We'll look at a case study of how an organization established a data governance plan that created a more satisfied and still creative staff while greatly improving data accuracy and performance.

#### **402 - ACL's National Adult Maltreatment Reporting System (Part 1)**

Stephanie Eliason, MSW, U.S. Administration for Community Living/  
Office of Elder Justice and Adult Protective Services  
Scott Cory, U.S. Administration for Community Living  
Helen Lamont, U.S. DHHS/Assistant Secretary for Planning and Evaluation

In Part 1 of this workshop, the Administration for Community Living (ACL) will share how ACL -with input from APS agencies from more than 30 states - planned, develop, designed and implemented the first nationwide pilot system to report maltreatment of older adults and persons with disabilities the National Adult Maltreatment Reporting System (NAMRS). Presenters will share an overview of the results of the pilot, including discussion of the data submitted by the pilot states, and the next steps for NAMRS. In part 2, presenters will provide a demonstration of the NAMRS tool, discuss in more detail the data elements included in the tool, and answer questions participants have regarding working with NAMRS, including the technology infrastructure, mapping state data to the NAMRS tool, and transmitting data.

#### **403 - Money Smart for Older Adults: Helping Older Adults Prevent Financial Exploitation**

Jenefer Duane, Office For Older Americans, Consumer Financial Protection Bureau

Join the CFPB Office for Older Americans for a train-the-trainer on utilizing the Money Smart for Older Adults curriculum in your community to prevent and raise awareness of elder financial exploitation. This interactive session will explore the curriculum and demonstrate effective techniques for teaching older people and family caregivers about frauds, scams and other forms of financial exploitation. The presentation will also share best practices for effective presentations, speaker tips, and strategies for planning seminars and engaging stakeholders such as financial institution as partners in prevention and response.

#### **404 - Acutely Vulnerable Adults: New Methods for Identification & Intervention with Most At-Risk Clients**

Christina Alire, Adult Protective Services of San Diego County  
Joan Tierney, Adult Protective Services of San Diego County  
Kimberly Ingram, Adult Protective Services of San Diego County  
LaShaunda Gaines, Adult Protective Services of San Diego County  
APS is continually challenged by limited resources and difficult decisions about how to best allocate those resources. APS in San Diego County has committed to identifying cases where the client is thought to be most at risk for abuse and ensuring that the resources necessary for mitigating the risk are being expended. A workgroup was established in January 2012 to determine who are most at risk (the "acutely vulnerable"), and how to most effectively work to reduce risk. We have established a tool for identifying those clients who are considered to be the most vulnerable due to their severe

cognitive impairment or communication deficits, and their dependence on individuals who are assessed as being high risk for perpetrating abuse. A field investigation tool, Enhanced Assessment Form, and an Outcome Measure Instrument have been designed and implemented. The AVA protocol employs a broad range of interventions targeted to not only address and resolve the reported protective issue(s), but also to enhance the overall safety and well-being of the client. Interventions specific to the special challenges of these cases include the use of involuntary service plans, "Collaborative Decision Making" (CDM) meetings with suspected abusers and collateral, cross-regionals MDTs for case input and review before case closure, and a "tickler system" for follow-up when appropriate. This workshop will describe the development and implementation of the AVA policies, protocols and tools/instruments. There will also be discussion of the successes and challenges associated with internal program implementation and APS efforts to effectively collaborate with other essential programs and agencies.

#### **405 - Partnering with Legal Providers to Respond to Elder Financial Exploitation**

Mary Haberland, Bay Area Legal Services, Inc.  
Sarah Halsell, Florida Department of Elder Affairs

As the number of vulnerable seniors increase, so does the risk that they will be exploited financially. With the limitations on resources to address critical needs, the need to work together to coordinate and integrate services between the aging network, legal services, and APS programs has never been greater. Participants will learn about the work of the State Legal Services Developer, a position required in each state by the federal Older Americans Act, and how the Developer can facilitate Elder Rights Advocacy and provide effective strategies for integrative partnerships. Information will be provided about how to identify civil legal issues in reported cases of adult abuse, neglect, and exploitation, and to make appropriate referrals to free civil legal providers in the client's community or through the Florida Senior Legal Helpline (or comparable state resource). After an overview of legal issue-spotting for non-lawyer elder advocates, participants will learn about available legal resources, developing interdisciplinary referral networks, and how to improve the effectiveness of referrals both to and from network partners. For the last half of the session, participants will be given case histories to work on in small groups to develop an action plan for helping the senior client in their example recover from the reported problem.

#### **406 - Balancing Rights, Protection and Legal Intervention; Adult Protective Services in Guardianship**

Mary McGurran, Minnesota Department of Human Services  
Melissa Vongsy, Minnesota Department of Human Services  
The role of APS in guardianship depends on each state's statutes for both adult protective services and for guardianship. Despite state to state variations in statute, are there consistent principles for the role of adult protective services in assessing need for guardianship, screening, petitioning, funding, acting as guardian, and evaluating guardianship services? This session will use recommendations developed through a NAPSA Technical Assistance Grant to Minnesota APS as a starting point for the development of a person centered, outcome based, structured decision making model for APS's role in guardianship.

#### **407 - Investigating and Responding to Late Life Domestic Violence: A New Training Video (Part 1)**

Dr. Holly Ramsey-Klawnsnik, NAPSA/NAPSRC

Deborah Fogarty, MA, MA Executive Office of Elder Affairs  
Kathryn Chihowski, MSW, LICSW, MA Executive Office of Elder Affairs  
APS programs nationwide struggle to prepare staff to effectively investigate and intervene in cases of alleged domestic and sexual violence. A new training video and discussion guide produced by the Massachusetts Executive Office of Elder Affairs addresses and depicts investigative interviewing of both alleged victims and perpetrators. Considerations and strategies for providing a multi-disciplinary response to older victims are also featured. This workshop will premiere portions of the video and demonstrate its use as a training and discussion-generating tool. We will address investigative interviewing of alleged victims and perpetrators, stressing victim and worker safety and clinical and forensic principles. We will also describe the three-year MA project funded by the Office of Violence Against Women designed to (1) promote collaboration on behalf of victims between protective services, domestic violence and sexual assault professionals, (2) elucidate the special needs of older DV and sexual assault victims and the complexities involved in providing effective response, and (3) produce this much-needed training video.

#### **408 - When is a Bruise Not a Bruise - Forensic Wound Identification and Documentation of Abuse and Neglect (Part 1)**

Daniel J. Sheridan, PhD, RN, FAAN, Professor, Goldfarb School of Nursing at Barnes-Jewish College

In this two-part presentation, participants from multiple disciplines will learn techniques for improving their verbal and physical assessments of abuse and neglect, forensic documentation, both written and photographic, of vulnerable individuals with possible abuse-related injuries. In addition, participants will learn to better assess if injuries were from falls versus being "found down." Forensic terminology will be presented in a format immediately useful to various professionals. Using a case history approach, an extensive series of instructive injury slides will be shown to demonstrate patterned injuries and injuries in various stages of healing. The last part of the workshop will include group participation and discussion to correctly identifying forensic injuries in two adjudicated cases and discuss how to best document and investigate the cases. To maximize learning, it is highly recommended participants attend Part 1 which will build in Part 2.

## **Workshop Sessions V**

**Wednesday September 30, 2015 4:00 PM - 5:30 PM**

#### **501 - The Benefits of Integrating Evidence Based Mental Health Interventions within Elder Abuse Services**

Jackie Berman, NYC Department for the Aging

Jo Anne Sirey, Weill Cornell Medical Center, Division of Psychiatry

Aurora Salamone, NYC Department for the Aging

Research has shown that older victims experience high levels of stress and depression. They often feel embarrassed, suffer a loss of self-esteem, and feel that their situation is hopeless. When victims seek assistance they are often coached to take steps to protect themselves, such as create a safety plan, limit contact with alleged perpetrators, consider seeking prosecution, and potentially alter their living situation. If the victim is depressed, symptoms of depression may undermine motivation and ability to take needed action. Ultimately elder abuse interventions may be underutilized as a consequence of depression. This workshop will explore the impact that depression has on a client's attitude and actions towards combating elder abuse.

We will review the current literature on depression and look at a standardized screening tool that can be used to identify depression. Finally, we will discuss an evidence based intervention tailored specifically for elder abuse victims and being piloted at the NYC Department for the Aging's Crime Victim Resource Center. Initial findings indicate that over one-third of elder abuse victims suffer from major depression, indicating a high level of need. Although the program is still in its infancy, over sixty percent of victims recommended for mental health services have agreed to participate in the program.

#### **502 - ACL's National Adult Maltreatment Reporting System (Part 2)**

Stephanie Eliason, MSW, U.S. Administration for Community Living/Office of Elder Justice and Adult Protective Services

Scott Cory, U.S. Administration for Community Living

Helen Lamont, U.S. DHHS/Assistant Secretary for Planning and Evaluation

In Part 1 of this workshop, the Administration for Community Living (ACL) will share how ACL -with input from APS agencies from more than 30 states - planned, develop, designed and implemented the first nationwide pilot system to report maltreatment of older adults and persons with disabilities the National Adult Maltreatment Reporting System (NAMRS). Presenters will share an overview of the results of the pilot, including discussion of the data submitted by the pilot states, and the next steps for NAMRS. In part 2, presenters will provide a demonstration of the NAMRS tool, discuss in more detail the data elements included in the tool, and answer questions participants have regarding working with NAMRS, including the technology infrastructure, mapping state data to the NAMRS tool, and transmitting data.

#### **503 - Family Financial Exploitation and APS: A Thin Blurred Line**

Karen Hannigan, Fairfax County Adult and Aging

Sean Gray, Fairfax County Adult and Aging

When faced with financial exploitation allegations external from family systems interactions - telephone scams, home repair overcharges or neighbors, paid caregivers or strangers helping themselves to client resources - the guidelines for how APS should intervene are clear. With family-based financial exploitation, the additional complex emotional family dynamics and the practical costs of intervention make best practice guidelines more difficult to articulate. This interactive workshop will explore a decision-making framework to help APS staff and their supervisors define when to take action. When should APS move to sever the financial access of a dependent adult family member who is also providing the client some needed care when the client lacks capacity to manage his or her own finances? How can we identify what is long-standing client choice regarding the use of their resources by family members vs. financial exploitation to in order to make an allegation founded or unfounded? Emphasis will be on "due no harm" when terminating the financial exploitation by a family member, as this action may mean replacing the tasks done for the older adult with higher-cost paid elder care services. Shades of grey regarding possible interventions will be explored in depth, as will the costs and benefits APS-initiated "cutting the financial family cord."

#### **504 - Improving the Response to Victims of Elder Abuse through Multidisciplinary Teams**

Shelly Jackson, Office for Victims of Crime

Elder abuse multidisciplinary teams are gaining prominence, and yet many communities have not embraced this approach. This workshop will define the elements of a multidisciplinary team, discuss the

types of training associated with multidisciplinary teams, briefly describe the case review process, and review existing research on elder abuse multidisciplinary teams. The workshop is unabashedly designed to promote the expansion of multidisciplinary teams as a model for responding to victims of elder abuse and encourage adult protective services caseworkers to join or develop a multidisciplinary team in their community.

#### **505 - Not Just Child's Play**

Jodi Sobotka, Texas Adult Protective Services

This workshop will look at stress management and how to use laughter to diminish stress in our professional and personal lives. We will look at statistics about stress, how it affects so many aspects of our lives; then we will go on to explore how laughter, fun and getting back to child like attitudes will make us happier, healthier and more productive in our lives. There will be tons of fun with toys, videos and more in this workshop.

#### **506 - The 2015 Survey of Nurses in APS: The Value Nurses Add to APS Work**

Lori Delagrammatikas, Academy for Professional Excellence  
Janine Brady, Aging & Independence Services, Health & Human Services, San Diego, CA

Are you considering adding nurses to your APS staff? Do you already have nurses on staff but wonder if you are using them as effectively as you could? Do you have questions about what duties they should be performing or what they should be documenting? How do you justify the cost of adding nurses? This workshop will give you an opportunity to see how agencies across the state and the county have answered these questions. In addition, the presenters will talk about the work being done to develop best practice standards for this specialized group of nurses.

#### **507 - Investigating and Responding to Late Life Domestic Violence: A New Training Video (Part 2)**

Dr. Holly Ramsey-Klawnsnik, NAPSA/NAPSRC

Deborah Fogarty, MA, MA Executive Office of Elder Affairs

Kathryn Chihowski, MSW, LICSW, MA Executive Office of Elder Affairs

APS programs nationwide struggle to prepare staff to effectively investigate and intervene in cases of alleged domestic and sexual violence. A new training video and discussion guide produced by the Massachusetts Executive Office of Elder Affairs addresses and depicts investigative interviewing of both alleged victims and perpetrators. Considerations and strategies for providing a multi-disciplinary response to older victims are also featured. This workshop will premiere portions of the video and demonstrate its use as a training and discussion-generating tool. We will address investigative interviewing of alleged victims and perpetrators, stressing victim and worker safety and clinical and forensic principles. We will also describe the three-year MA project funded by the Office of Violence Against Women designed to (1) promote collaboration on behalf of victims between protective services, domestic violence and sexual assault professionals, (2) elucidate the special needs of older DV and sexual assault victims and the complexities involved in providing effective response, and (3) produce this much-needed training video.

#### **508 - When is a Bruise Not a Bruise - Forensic Wound Identification and Documentation of Abuse and Neglect (Part 2)**

Daniel J. Sheridan, PhD, RN, FAAN, Professor, Goldfarb School of Nursing at Barnes-Jewish College

In this two-part presentation, participants from multiple disciplines

will learn techniques for improving their verbal and physical assessments of abuse and neglect, forensic documentation, both written and photographic, of vulnerable individuals with possible abuse-related injuries. In addition, participants will learn to better assess if injuries were from falls versus being "found down." Forensic terminology will be presented in a format immediately useful to various professionals. Using a case history approach, an extensive series of instructive injury slides will be shown to demonstrate patterned injuries and injuries in various stages of healing. The last part of the workshop will include group participation and discussion to correctly identifying forensic injuries in two adjudicated cases and discuss how to best document and investigate the cases. To maximize learning, it is highly recommended participants attend Part 1 which will build in Part 2.

## **Workshop Sessions VI**

**Thursday October 1, 2015 9:00 AM - 10:30 AM**

#### **601 - Tools for Fighting Elder Financial Exploitation and Helping Financial Caregivers from CFPB**

Naomi Karp, Consumer Financial Protection Bureau

The CFPB's Office for Older Americans is the only office in the federal government dedicated to the financial health of older adults. The workshop will focus on CFPB's Managing Someone Else's Money initiative--tools to help financial caregivers take good care of vulnerable adults' assets and safeguard them from financial exploitation and scams. The session will review the national guides as well as new state-specific guides--and teach participants how to adapt the guides for their state. APS can play a key role in creating state guides in collaboration with other stakeholders! Also covered in this session will be CFPB's consumer complaint function that can help your clients, and other initiatives for a variety of service providers including assisted living, nursing facilities, banks and credit unions. We'll also open the floor for discussion of how CFPB can support the work of APS around the country.

#### **602 - State Securities Regulators Tackle Elder Financial Abuse**

Pamela Epting, Florida Office of Financial Regulation

Ronald Long, Wells Fargo Advisors

Often, elder financial abuse targets the brokerage accounts of older investors. State securities regulators play a key role in ferretting out such abuse and working to bring bad people to justice. This workshop will assist the APS professional in learning the broad jurisdiction of the securities regulators as well as how APS can help the regulators pursue securities fraud. The regulators will also describe how they can work with financial institutions as well as APS in getting their mission accomplished,

#### **603 - The Intersection of APS and Guardianship: Working Together for Positive Outcomes**

Philip C. Marshall, Roger Williams University

Kim Grier, National Guardianship Association

Guardians often become part of the APS process only after they are appointed by the court. Involving guardians earlier in the process as a part of an interdisciplinary approach, will facilitate sharing expertise on cases—aimed toward achieving a person-center approach to elder care. This interactive session will be informed the story of philanthropist Brooke Astor whose grandson sought guardianship, will guide discussion between speakers and participants about the realities of guardianship, how involving a guardian in the APS process can assist

with surrogate and supported decision making, and strategies on engaging guardians in the process.

#### **604 - Preventing Elder Abuse: A Partnership Between Adult Protective Services and Primary Care**

Rachel Duer, Texas Adult Protective Services

Robert Blancato, Matz, Blancato & Associates

Carol Zernial, WellMed Medical Management, Inc.

Adult Protective Services has typically responded to elder abuse as opposed to preventing it. Hear about an ACL grant that is helping to embed Adult Protective Services in primary care clinics across Texas. Find out about a new screening tool that identifies seniors who are at risk of abuse. Learn about success stories and why this project may change the way healthcare responds to suspected abuse.

#### **605 - APS and Civil Attorneys - Allies in the Fight Against Elder Financial Abuse**

Prescott Cole, California Advocates for Nursing Home Reform (CANHR)

William F. Benson, Health Benefits ABCs

Elder Financial Abuse is on the rise. APS social workers frequently encounter victims of elder financial abuse in need of legal expertise in civil law and restitution. By allying with civil attorneys, APS programs can link financial abuse victims to critical legal services such as trusts and estates litigation, civil commercial litigation, collaborative mediation, small claims court, and senior legal services. In working together, APS social workers and civil attorneys improve a community's response to elder financial abuse and help victims achieve justice.

#### **606 - The Intersection of APS & Criminal Abuse Investigations**

Candace Heisler, Heisler and Associates

Holly Ramsey-Klawnsnik, Ph.D., NAPSRC/NAPSA

The elder abuse field has supported the belief that effective response to elder abuse requires a collaborative multidisciplinary response. Yet when APS and law enforcement conduct coordinated investigations there are significant ethical and investigative differences that must be understood and considered. When such differences are appreciated forensically sound investigations are able to be conducted which also minimize harm and trauma to victims. In this workshop case scenarios and small group tasks will be used to explore APS/law enforcement collaborations which build legally sufficient cases while accommodating victim needs.

#### **607- Best Practice Standards for APS Nurses: An Interactive Discussion**

Lori Delagrammatikas, Academy for Professional Excellence

Janine Brady, Aging & Independence Services, Health & Human Services, San Diego, CA

The National Coalition of APS Nurses has begun the process of developing best practice standards for APS nurses. In this interactive workshop, you can join that discussion and help to shape that standard. The workshop will present the work done to date and pose some of the more complex issues to the group for discussion. If you are an APS nurse, have nurses on staff or are considering adding nurses to your staff, you will want to learn about these issues. Join us!

#### **608 - Mental Health Issues for the Elderly - End of Life Issues**

Isbell Oliva-Garcia, Department of Children and Families, APS

Most elderly reach the end of their lives with many questions, fears

and anxiety. They have end of life issues and questions that many professionals are afraid to address. Their fears are normal but so is Death and they need more than just Hospice Care and/or Palliative Care which many times directs its services at just physical comfort but does not address the ongoing anxieties and depressions that come along with the end of life for the elderly. For example many times there are problems that have had no closure or unresolved issues that need to be addressed to bring about lessened anxieties. Focused therapies such as person centered, existentialism and dignity therapies offer support, compassion, empathy and a much needed ear to listen to our elderly. This workshop would offer awareness, education to professionals and a venue to express fears and concerns regarding this topic which is still considered a taboo in our society. Our elderly need to be helped psychologically before and during hospice and palliative care. Workshops, group sessions and individual therapies offer this type of treatment which can be two-fold because it provided also socialization to the elderly and contact with the outside world.

## **Workshop Sessions VII**

**Thursday October 1, 2015 10:45 AM - 12:15 PM**

#### **701 - Allies in the Good Fight, Law Enforcement and APS Unite**

Timothy F.X. Grant, Massachusetts State Police

David Viens, Disabled Persons Protection Commission

This presentation will demonstrate, through case scenarios that have been investigated in Massachusetts, how law enforcement, APS, and Human Services Agencies can work together in a comprehensive and complimentary manner to investigate allegations of crimes against persons with disabilities. In the course of presenting the case scenarios, the participants will learn what to do and what not to do when an allegation of abuse confronts them. The participants will also learn how Massachusetts has broken through the barriers, through educating both Human Services Agencies, and Law Enforcement, that to be successful in fighting crimes against persons with disabilities, they must be allies and work together. This presentation was given in past years at N.A.P.S.A Conferences. It has received excellent feedback on the evaluations in regards to the relevance of the presentation, and was suggested that the presentation be brought back for future conferences. The co-presenter this year would bring a new perspective, where works as Investigations Manager for the Disabled Persons Protection Commission.

#### **702 - Effective Identification and Investigation of Elder Abuse Cases Involving Physical Abuse or Neglect**

Arlene Markarian, King's County District Attorney's Office

Despite having over 420,000 senior citizens living in Kings County (Brooklyn), the Brooklyn District Attorney's Office Domestic Violence Bureau's Elder Abuse Unit had approximately 457 cases (cases involving intimate partner, parental, grandparental and caregiver abuse) in Year 2014. The typical offender is the adult child or grandchild of the victim. Most abusers are drug or alcohol addicted and/or have some level of mental illness. Since 1999, The Brooklyn District Attorney's Office Elder Abuse Unit had 26 elder homicides—21 were parental/grandparental and 5 were intimate partners. Of the 21 parental/grandparental homicides, only one victim ever called the police and had tried to get help for themselves and the offender. All of the offenders had some level of substance abuse and/or mental illness. There was never any intervention in the other households. Brooklyn is 1 of 40 jurisdictions in the country that has a Family Justice

Center ["FJC"]. In fact, there is a very strong elder abuse component to the Center. The FJC is located on the same floor as the District Attorney's Office Domestic Violence Bureau and Elder Abuse Unit. Social workers and attorneys from senior service agencies staff the FJC so that the victims' social service and legal needs can be met. Our Office has a Victim Services Unit which, along with the Elder Abuse Unit victim advocates, provides social service referrals, crime victim counseling, accompanies victims to court, arranges for transportation and makes home visits for victims who are physically unable to come to our Offices.

### **703 - It's Dangerous Out There: Building a Safety Program to Protect Your APS Workers**

Jessica Denison, Oregon Office of Adult Abuse Prevention and Investigations

Marie Cervantes, Oregon Office of Adult Abuse Prevention and Investigations

This workshop is intended to provide administrators and decision makers with the tools to develop and implement a Safety Coordinator position within their state. Participants will learn how to build a case for the position, how to write a position description, and how to gather and implement data to support the need. Participants will learn what essential skills, qualities, and experiences to look for when hiring. Participants will also hear what Oregon's Safety Coordinator has created related to policy and training, unforeseen obstacles, and lessons learned.

### **704 - Standardization and Certification; Looking Back and Looking Ahead**

Kevin Bigelow, NAPSA

Lori Delagrammatikas, San Diego State University-Academy for Professional Excellence

Are you thinking of providing more training (or wishing your program had more training)? Are you facing the struggle to fund training in your program? This workshop will discuss the history and development of NAPSA Training Resources, lessons learned from the development process. It will also offer a discussion on the obstacles to funding training, and the status of the NAPSA Certificate Program under development.

### **705 - Tales from the Dark Side: Lessons Learned from APS Horror Stories**

Pamela Slaughter, Multnomah County APS

This workshop is interactive, lively, educational, fun, and features storytelling. True APS stories will be shared with the participants. Each story will represent an example of something that went terribly wrong. The thing that all of the stories have in common is this: What went wrong was foreseeable and preventable. At the conclusion of each story, participants will be prompted through questions, exercises or statements, to identify the pitfalls contained in the story. They will then work with the presenter and each other, to create reasonable solutions to the problem. In addition, they will identify ways that the APS worker in the story could have avoided the situation altogether. The more experienced APS workers will have an opportunity to share their wisdom and tips with newer workers. As a result, the newer workers will gain a new perspective to look through when dealing with unusual APS situations. In the unlikely event that any of the solutions are not thoroughly identified, then the presenter will share the answers with the participants. The stories, solutions, and ideas for prevention will be captured, and shared with participants.

### **706 - Enhanced Multidisciplinary Teams: NYS's pilot intervention in cases of elder financial exploitation**

Allison Campbell, LMSW, Lifespan of Greater Rochester Inc.

Peg Horan, LMSW, New York City Elder Abuse Center

Paul L. Caccamise, LMSW, ACSW, Lifespan of Greater Rochester

Since 2012 NYS Office for the Aging, the NYC Elder Abuse Center and Lifespan of Greater Rochester have collaborated in an innovative grant project, funded through an Administration for Community Living Elder Abuse Prevention Interventions grant, to address financial exploitation of older adults. Project partners have established specialized multidisciplinary teams in two pilot regions in New York State. Presenters will discuss the development and operation of teams that bring together multidisciplinary specialists and forensic accountants to address complex financial exploitation cases.

### **707 - Developing APS Leaders in Texas**

Michael S. Roberts, MPA, Texas Department of Family and Protective Services

Kez Wold, Texas Department of Family and Protective Services

It isn't just APS clients who are aging. Baby boomers are retiring, and that means many APS administrators will retire in the near future. Developing leaders is essential for the continued advancement of the field of adult protection. This workshop describes the programs and processes Texas APS uses to cultivate the next generation of APS leaders.

### **708 - Guardianships in NYS - A Look At The Role of APS in Cases Across NYS**

Jean Callahan, JD, MSW, Brookdale Center on Healthy Aging of Hunter College

Raquel Malina Romanick, JD, Brookdale Center for Healthy Aging of Hunter College

The goal of his session is to give a broad look at the state of guardianship and to share the findings of trends and patterns we have found while looking at 14 counties over a 10 year period. We will present an overview of our research - including a discussion of the breakdown of APS cases across 14 counties. Using data and case studies, the presenters will give participants an understanding as to why guardianship cases are brought, who is bringing them and problems and issues with the legal process. Participants will also learn about challenges wards, their families and guardians face after the appointment of a guardian. A discussion about hurdles in finding guardians in low income cases will be had. Presenters will also discuss the difficulties in obtaining consistent and reliable statewide data and how data can inform systems. This is a research project but will have strong policy implications.

## **Workshop Sessions VIII**

**Thursday October 1, 2015 3:00 PM - 4:30 PM**

### **801 - The New York State Cost of Financial Exploitation Study**

Alan Lawitz, Esq., Director, Bureau of Adult Services, NYS Office of Children & Family Services

Yufan Huang, Bureau of Research, Evaluation and Performance Analytics, NYS Office of Children & Family Services

Those who work in APS and related fields serving vulnerable adults are aware that the number of APS referrals relating to financial exploitation (FE) has risen significantly in recent years. While our State APS systems usually track the numbers of FE referrals and case-

related information, such systems often do not adequately address the financial costs of FE. New York, inspired by the Utah Study, undertook to collect the following critical base-line data to inform our understanding of the real costs of FE: the cost of funds and other property stolen from vulnerable APS victims of FE; the staffing and other costs to APS and other agencies to investigate, conduct assessments and other activities as a result of the FE referral; and the cost of providing new and additional government benefits and services to APS victims as a result of the FE. In addition, the study sought information concerning the nonfinancial costs of FE, including methods perpetrators use to exploit their victims; characteristics of victims relation of victims to perpetrators; civil or criminal court proceedings. This session will also discuss how the information provided by the study could provide a basis for a variety of actions relating to prevention of FE and intervention when FE is occurring. This workshop will describe The New York State Cost of Financial Exploitation Study and present its findings.

### **802 - How to Grow Old Without Going Broke! Steps You can Take Toward a Financially Secure Retirement**

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

Retirement planning is important for everyone, especially women. Women's longer lives, their lower lifetime income, caregiving responsibilities, a likelihood of being single with reduced income, and health care needs can present major financial problems in retirement. The challenge for women is to plan carefully enough and take the steps

### **803 - Intersection of Adult and Child Protective Investigations**

Eric D. Schurger, Attorney at Law, Florida Department of Children and Families

"Intersection of Adult and Child Protective Investigations Workshop Proposal In the Intersection of Adult and Child Protective Investigations seminar, attorney Eric Schurger analyzes the law protecting children and adults, illustrates a case study with photographs, and reveals surprising outcomes. The interactive presentation focuses on safety, permanency and well-being for vulnerable adults and children through investigations and services by multiple agencies and providers. It will be of particular interest to attorneys, investigators, judges, law enforcement officers, magistrates, service providers, and other professionals interested in coordinating cases. Eric Schurger is an Assistant Regional Counsel with the Florida Department of Children and Families. His diverse law practice within the General Counsel's office includes all program areas and emphasizes adult protective services cases and child dependency law. He has litigated hundreds of cases and defended dozens of appeals. He has quasi-judicial experience as a hearing officer, arbitrator, and special magistrate. Eric is a former private practitioner, prosecutor, and paralegal. He has earned honors in college, law school, and professional associations. His community service includes volunteer teen court judge and Cub Scouts leader. Eric is an experienced lecturer on legal topics including elder law, criminal law, ethics and civil law. The lecturer will compare and contrast the Florida Adult Protective Services Act and the law on Proceedings Related to Children (dependency).

### **804 - Hoarding 101**

Lisa O'Neill, University of Arizona Center on Aging

This presentation will cover basic Hoarding Disorder definition, facts, assessments, and treatment options. It will also include information on animal hoarding and discuss different types of animal hoarding behaviors. A case review will also be discussed to illustrate why an interprofessional and interagency approach to hoarding is needed.

I will also be able to provide information/stats from our "Buried in Treasures" 20 week, evidence based program - cohort 1 (N~40). "Buried in Treasures" is a facilitated, self-help, support group for people with Hoarding Disorder or hoarding tendencies to help them manage their hoarding behavior, learn skills to reduce their clutter, and most importantly, learn they are not alone.

### **805 - Practical Ethics in Protective Services**

Christopher Dubble, Temple University

Protective Services Investigators who work with adults vulnerable to abuse, neglect, exploitation, and abandonment, and their families require unique knowledge and skills to effectively work with this challenging yet rewarding clientele. Beyond this specialized knowledge and skill set, investigators routinely face ethical issues and dilemmas in their day to day practice. These decisions can range from concerns about whether to accept a gift that doesn't have significant monetary value to deciding whether to leave someone at risk out of respect for their right to make autonomous decisions. The presenter has significant experience delivering this course to the Protective Services and Aging professional networks in Pennsylvania. This presentation utilizes a framework that incorporates ethical principles in way that takes ethics out of the theoretical and provides investigators and their agencies a practical resource for ethical decision-making.

### **806 - Convincing the Criminal Justice System That You Have a Case**

Candace Heisler, Heisler and Associates

Lori Delagrammatikas, Project MASTER, San Diego State University  
APS workers are often frustrated when serious cases they have investigated are not prosecuted. This workshop will give insight into how law enforcement officials and prosecutors analyze cases, determine what must be proven, and evaluate evidence in light of available information. With such information APS workers will be better able to evaluate their own cases for involvement in the criminal justice system and better present their cases to law enforcement for investigation and prosecution.

### **807 - Forensic Accounting: Tools for Exploitation Investigations**

Jason Olson, Eide Bailly LLP

This workshop will provide insight on when and how to use forensic accountants in financial exploitation cases. Jason will walk us through past financial exploitation cases and provide information on forensic accounting, where to start with an investigation, what to look for, how to identify what is missing, how to summarize findings and how forensic investigative tools can assist with investigations. Presenter: Jason Olson, MBA, CPA/CFF, CFE, CFI - Eide Bailly LLP's Forensic & Valuation Services Division, Minneapolis, Minnesota

### **808 - Grandma, What Large Bank Accounts You Had: When and How to Use a Forensic Accountant**

Karen Webber, CPA, StoneBridge Business Partners  
Allison Campbell, LMSW, Lifespan of Greater Rochester, Inc  
Art Mason, LMSW, Lifespan of Greater Rochester, Inc

This workshop will provide tips and techniques for investigating cases of financial exploitation. Using actual cases and creative approaches, the panel will discuss how to find and use a forensic accountant to provide in-depth analysis and critical information that can lead to successful outcomes for victims of financial exploitation.

*You're Invited*



**26th Annual National Adult Protective Services  
Association Annual Conference  
Welcome Reception**

Tuesday September 29, 2015

6:00 PM - 8:00 PM

Ballroom D | Rosen Plaza Hotel | Orlando, FL

Light Appetizers | Cash Bar | Music

**6th Annual  
Summit on Elder Financial  
Exploitation**



**FRIDAY OCTOBER 2, 2015**

ROSEN PLAZA HOTEL | ORLANDO, FLORIDA

The Summit on Elder Financial Exploitation is an opportunity to meet other important stakeholders and to learn the complex ways in which elder financial exploitation occurs and the many organizations and programs which are addressing it in creative and effective new ways.

Details available soon at [www.napsa-now.org/conference](http://www.napsa-now.org/conference)

# 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 this population. 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: Last year we had over 600 attendees at the conference and over 150 at the summit.

**Q: What's different about the conference in 2015?**

A: We are pleased to expand our conference in 2015 to include an additional 1/2 day of education (two workshop sessions, for a total of 16 additional workshops). The conference begins mid-day on Tuesday Sept. 29 in order to allow attendees to travel to the event that morning.

**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 after [making a reservation](#) for the event. This cost is the [GSA approved rate](#).

**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 6th Annual Elder Financial Exploitation Summit included in the conference registration fee?**

A: It is not, sorry. There is a separate fee for this event.

**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 happy to make continuing education available, but please check this section of your registration form in order to receive them.

**Q: How far is the hotel from Walt Disney World and Universal Studios?**

A: The host hotel is about [7.5 miles from the Walt Disney World Resort](#) and about [3.8 miles from Universal Orlando Resort](#).

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

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

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

A: The price will raise on September 1, 2015 at 12:00 AM Eastern Time.

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

A: Continental breakfast is included in your registration price for Wed. and Thurs. of the conference and summit. Lunch is provided on Thursday Oct. 1, 2015 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 serve.