



MIKE DEWINE

★ OHIO ATTORNEY GENERAL ★

**OHIO ATTORNEY GENERAL'S ELDER ABUSE COMMISSION
FEBRUARY MEETING MINUTES
CONFERENCE CALL
MONDAY, FEBRUARY 23, 2015
9:30 AM – 10:30 AM**

MEMBERS PRESENT

NAME

Georgia Anetzberger
Patrick Bailey
David Barney
Marc Baumgarten
Shelly Boyd
Judith Brachman
Jodi Crowe
Cindy Farson
Gene Fischer
Cindy Kuhr
Stephanie Graubner Nelson
Thomas Swift
Adreana Tartt

REPRESENTING

National Committee for the Prevention of Elder Abuse
County Commissioners Association of Ohio
Ohio Department of Insurance
Ohio Department of Mental Health and Addiction Services
Ohio Department of Job and Family Services
Interests of the Elderly
Ohio Board of Nursing
Ohio Association of Area Agencies on Aging
Buckeye State Sheriffs' Association
Ohio Victim Witness Association
Supreme Court of Ohio
Ohio Association of Probate Judges
Ohio Department of Mental Health and Addiction Services

Ursel McElroy

Ohio Attorney General's Office – Commission Staff/Lead

WELCOME – Ursel McElroy

- Opened the meeting by welcoming members.
- Agenda and conference call tips reviewed.

REVIEW MEETING MINUTES – Commission

- October 27, 2014 meeting minutes approved.

ANNOUNCEMENTS – Commission

- Attorney General Mike DeWine will host the annual Two Days in May Conference on Victim Assistance May 4 – 5, 2015 at the Hyatt Regency Columbus Downtown. The conference generally attracts 1000 victim advocates, prosecutors, and law enforcement professionals throughout Ohio. This year's theme is "Advancing Advocacy to Serve All Victims" and many of the workshops will address underserved population, including the elderly and people with disabilities. Visit www.ohioattorneygenera.gov for details on workshops and award nominations.
- The Ohio Family Violence Prevention Project released a policy brief entitled, "Preventing Financial Exploitation by Family Members: Policy Considerations for Ohio" on Friday, February 21, 2015. Ursel McElroy and Georgia Anetzberger are commission members that contributed to the project. Based on consultation with experts and a review of research literature, the following three approaches are cited as promising: (1) educating seniors and their concerned family members; (2) creating a clear policy environment for financial institutions; and (3) improving how incidents are investigated and recorded. Visit <http://grc.osu.edu/familyviolenceprevention/> to view the entire report.

Meeting minutes prepared by Ursel McElroy

- The True Link Report on Elder Financial Abuse 2015 was released in January. It reveals that \$36.48 billion is lost annually to elder financial exploitation – more than 12 times what was originally reported. The report provides details about the size of the problem, how seniors are being targeted, what puts them at risk, and how to protect them. Visit <https://www.truelinkfinancial.com/research> to view the entire report.

CHAIR’S REPORT – Ursel McElroy

Review of 2014

- A review of the commission’s major accomplishments in 2014:
- The Ohio Elder Justice Act was derived from the Commission’s work and was the impetus for the programmatic, legislative, and funding decisions related to Adult Protective Services (APS).
- Completed the integration of a behavioral health module into a two-day curriculum for elder abuse investigators.
- Hosted an elder financial exploitation symposium in partnership with the Ohio Bankers League, Ohio Credit Union League, Community Bankers Association of Ohio, and the Ohio Department of Commerce.

Priorities for 2015

- The commission has spent considerable time addressing APS - one aspect of a larger system of protection.
- In 2015, it will be important to diversify efforts to include elder abuse in facilities, criminal justice involvement, and working with allied professionals (ex: healthcare).
- Members offered preliminary suggestions:
 - Align efforts with current projects such as My Care Ohio;
 - Examine the summary report from the Ohio Attorney General’s Elder Financial Exploitation Symposium for possible ideas;
 - Provide information and resources to law enforcement through the Ohio Law Enforcement Gateway (OHLEG); and
 - Expand civil legal aid options for victims of elder abuse.

Subcommittees/Membership

- Along with identifying new priorities, the current subcommittee structure must be updated.
- Important to replace key members as they leave the commission.
- Members suggested replacements for a few key departments.

UNFINISHED BUSINESS – Commission

- None

NEW BUSINESS – Commission

White House Conference on Aging

- The 2015 White House Conference on Aging (WHCOA) is an opportunity to highlight the contributions of older adults today, and to shape the landscape of aging for the decade to come.
- WHCOA is launching a series of five regional forums throughout the country to engage with older Americans, their families, caregivers, and leaders in the aging field on the key issues affecting older Americans.
- Issues identified as priority matters for WHCOA 2015 include: retirement security, healthy aging, long term services and supports, and elder justice.
- The fourth forum is scheduled on April 27, 2015 in Cleveland, Ohio. The invitation-only forums are designed to help provide input and ideas for the 2015 White House Conference on Aging, which will be held in Washington, DC later this year.
- Commission members interested in attending or learning more should view <http://www.whitehouseconferenceonaging.gov/> for complete details.

Adult Guardianship – Stephanie Graubner Nelson

- The Supreme Court of Ohio published the proposed amendments to the Rules of Superintendence 66 that address adult guardianships on May 26, 2014 for public comment. The subcommittee received 32 comments for consideration.
- The Justices are expected to vote on the Rules of Superintendence 66 on February 24 or March 10, 2015.
- The Chief Justice has committed to providing free education, similar to existing training for guardians ad litem. It will include three hours of continuing education after the initial training. The trainings will be available through the Ohio Judicial College. Pilot training will be unveiled May 14 – 15 and members of the Supreme Court’s Subcommittee on Adult Guardianship are encouraged to attend and offer feedback.
- The Supreme Court of Ohio and the Ohio Association of Probate Judges are in the planning stages of hosting a Summit on Guardianship for September 2, 2015.

Adult Protective Services Funding Workgroup – Shelly Boyd

- The Mid-Biennium Review Budget appropriates up to \$10M in FY’15 for the APS system. Funds may be released by the Controlling Board per recommendations of the APS Funding Workgroup.
- The workgroup, appointed by the Governor, was charged with making recommendations to the Ohio Department of Job and Family Services (ODJFS) by September 30, 2014 about a distribution method for the \$10M appropriation for APS.
- Several members of the commission participated on the workgroup. The workgroup completed and submitted its report to the Ohio Department of Job and Family Services on September 25, 2014.
- Below is a status of the recommendations:

Recommendation 1: Define core minimum APS state and county program requirements

- APS core requirements have been identified related to screening, investigations, and services.

Recommendation 2: Implement a statewide APS data collection and reporting system

- ODJFS staff from the Office of Families and Children and the Office of Information Services have been researching the:
 - Type of APS reporting system that would be best for Ohio; and
 - Minimum data elements required to satisfy the reporting needs at the national, state, and local levels.
- ODJFS staff has met with a database vendor and consulted with other states regarding their APS database systems. No decisions have been made at this point.

Recommendation 3: Implement a statewide APS hotline

- Activities for this recommendation have not begun. The APS statewide hotline will likely use the same automated county phone system as child welfare.

Recommendation 4: Provide one-time all-system training

- The Ohio Human Services Training System (OHSTS) has adopted eight in-service training modules and three e-learning modules from the National Adult Protective Services Association (NAPSA) for its new core curriculum.
- The statewide “reboot training” requires each APS caseworker and their supervisor to take four in-service trainings and four e-learning trainings – all derived from the eight core modules.
- In Service Modules (6 hours total)
 - APS Value, Ethics, and Cultural Competence in APS
 - Collaboration in APS
 - Initial Investigation: Taking the First Steps
 - Professional Communication Skills
 - Dynamics of Elder Abuse

- Assessing Risk
- Case Planning
- Legal Framework for APS
- E-Learning Modules (1 hour total)
 - The Aging Process
 - Case Documentation
 - APS Worker Safety

Recommendation 5: Provide one-time planning funds for counties to meet core requirements

- APS Planning Grants are available January 1, 2015 through November 14, 2015.
- County departments of job and family services are eligible to receive funds to support the planning required to meet core program requirements by July 1, 2016. Funds are non-competitively awarded at the attainment of each of four benchmarks in the planning process:
 - Submission of a Letter of Attestation - \$10,000 (53 submitted)
 - Submission of a Plan of Cooperation - \$10,000
 - Establishment of an Interdisciplinary Team - \$10,000 (1 commitment)
 - Development of a Comprehensive Plan with a signed Memorandum of Understanding - \$20,000

Recommendation 6: Provide a one-time innovation fund to encourage multidisciplinary collaboration

- APS Program Innovation Grants are available January 1 through February 16, 2015.
- Grants up to \$150,000 each will be competitively awarded to support efforts that introduce new strategic or structural arrangements that allow counties to exceed or more efficiently comply with the APS core minimum requirements.
- Must be able to demonstrate that the proposed activities can be replicated in other parts of the state and must include a sustainability plan.
- Thirty-seven applications have been submitted to ODJFS.
- APS Capacity Building Grants are available February 16 through April 1, 2015.
- Grants up to \$35,000 each will be competitively awarded to support one-time APS program improvements that allow a county to more efficiently comply with minimum core requirements related to screening, investigations, and services. Applications must include a sustainability plan.
- One application has been submitted to ODJFS.

Other state requirements

- Write and amend policy as appropriate. H.B. 64 was introduced on February 11, 2015. The language in the bill reflects the recommendation from the APS Funding Workgroup.
- Work collaboratively on cross system issues. ODJFS has proposed a joint effort with the Ohio Attorney General's Office to assist with a one-time training initiative on how to develop I-Teams.

House Bill 24

- State Representatives Mike Dovilla (R-Berea) and Wes Retherford (R-Hamilton) introduced H.B. 24, the Ohio Elder Justice Act on January 29, 2015.
- H.B. 24 was referred to the House Judiciary Committee on February 10, 2015.

Action Plan 2015

- Tabled until next meeting.

▪ **ADJOURN**