ABSTRACT

DEVELOPMENT OF AN ELDER ABUSE AWARENESS TRAINING AND ELDER ABUSE RECOGNITION TOOL FOR MEALS ON WHEELS VOLUNTEERS

By

Rosemary Warren Lewallen

December 2011

The purpose of this project was to: (a) develop a replicable training program on elder abuse awareness, (b) develop a practical tool for Meals on Wheels (MOW) volunteers and staff to facilitate their recognition of signs of elder abuse, and (c) empower MOW volunteers and staff to report suspicions of elder abuse to prevent its continuance.

In Phase One, 108 people received a half hour training including a lecture and documentary defining elder abuse, listing signs, and describing its prevalence and devastating effects. In Phase Two, 75 people attended a half hour seminar by trained professionals who reviewed information, emphasized who must report and how to report, followed by a posttest. Results showed 97.5% correct answers to knowledge-based questions and 89% who were more likely to report elder abuse than before the training. In Phase Three, volunteers were shadowed at each site and found to be observant and aware of signs of abuse or neglect.
DEVELOPMENT OF AN ELDER ABUSE AWARENESS TRAINING AND ELDER ABUSE RECOGNITION TOOL FOR MEALS ON WHEELS VOLUNTEERS

A PROJECT REPORT

Presented to the Department of Family and Consumer Sciences

California State University, Long Beach

In Partial Fulfillment

of the Requirements for the Degree

Master of Science in Gerontology

Committee Members:

Barbara White, Dr.P.H. (Chair)
Wendy Reiboldt, Ph.D.
Diane Johnson, M.A.

College Designee:

Wendy Reiboldt, Ph.D.

By Rosemary Warren Lewallen

B.A., 2009, California State University, Long Beach

December 2011
ACKNOWLEDGEMENTS

This project was made possible with the guidance and suggestions of Dr. Barbara White and Dr. Wendy Reiboldt, from California State University, Long Beach, and Diane Johnson, Director of Retired & Senior Volunteer Program (RSVP), Alpert Jewish Community Center, as well as the wise counsel of Theresa Marino, Bureau Manager of Community Health, Long Beach Department of Health and Human Services. In addition, I recognize and appreciate the support of the late Dr. Jeanne Bader, whose passion inspired me to pursue this project. I also want to thank the Elder Abuse Prevention Team members, and, especially, those who donated their time, expertise and talent to help train Meals on Wheels volunteers to recognize and report elder abuse using this curriculum: Karen Fritz, Mark Kuntz, Pedro Carbajal-Madrid, Barbara McClinton, M.S.G., and Dr. Cheryl Matheiu.

I am extremely grateful for the consistent support and encouragement of my husband, John Philip Lewallen, in this academic endeavor. I also want to thank my daughter, Catherine Lapid, and Chris Palzer, RSVP, for technical assistance. Without their support and patience this project might not have been accomplished.
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACKNOWLEDGEMENTS ................................................................. iii</td>
</tr>
<tr>
<td>LIST OF WORKS ................................................................. vi</td>
</tr>
<tr>
<td>CHAPTER</td>
</tr>
<tr>
<td>1. INTRODUCTION ................................................................................. 1</td>
</tr>
<tr>
<td>Background of the Problem .......................................................... 1</td>
</tr>
<tr>
<td>Statement of the Problem ........................................................... 4</td>
</tr>
<tr>
<td>Purpose Statement ....................................................................... 4</td>
</tr>
<tr>
<td>Importance of the Project ........................................................... 5</td>
</tr>
<tr>
<td>Project Objectives ....................................................................... 6</td>
</tr>
<tr>
<td>Operational Definitions .............................................................. 6</td>
</tr>
<tr>
<td>Assumptions .................................................................................. 8</td>
</tr>
<tr>
<td>Delimitations ............................................................................... 8</td>
</tr>
<tr>
<td>Summary ...................................................................................... 9</td>
</tr>
<tr>
<td>2. LITERATURE REVIEW .................................................................... 11</td>
</tr>
<tr>
<td>Background of the Problem of Elder Abuse and Neglect ................. 11</td>
</tr>
<tr>
<td>The Role of Meals on Wheels Volunteers ...................................... 15</td>
</tr>
<tr>
<td>The Motivation of Volunteers ...................................................... 15</td>
</tr>
<tr>
<td>Motivational Theory .................................................................... 16</td>
</tr>
<tr>
<td>Why an Elder Abuse Awareness Training and Recognition Tool is Needed .................................................. 17</td>
</tr>
<tr>
<td>Summary ...................................................................................... 18</td>
</tr>
<tr>
<td>3. METHODOLOGY ................................................................. 19</td>
</tr>
<tr>
<td>Introduction ................................................................................. 19</td>
</tr>
<tr>
<td>Population, Sample Selection, and Social Context ......................... 20</td>
</tr>
<tr>
<td>Methodology Background .......................................................... 21</td>
</tr>
<tr>
<td>Program Outline .......................................................................... 24</td>
</tr>
<tr>
<td>Project Developer’s Role ............................................................ 27</td>
</tr>
</tbody>
</table>
## RESULTS

- Phase One Training Sessions .......................................................... 29
- Phase Two Sessions ........................................................................... 30
- Phase Three ...................................................................................... 33
- Summary ............................................................................................... 36

## DISCUSSION

- Evaluation of Project ........................................................................... 40
- Interpretations and Limitations ............................................................. 41
- Implementation ...................................................................................... 43
- Recommendations for Future Projects ............................................... 43
- Project Developer Role ......................................................................... 44
- Project Outcomes .................................................................................. 45

## APPENDICES

- A. PHASE ONE-LECTURE OUTLINE ....................................................... 49
- B. ELDER ABUSE RECOGNITION TOOL .................................................. 53
- C. PHASE TWO-LECTURE OUTLINE ....................................................... 55
- D. ELDER ABUSE RECOGNITION QUESTIONNAIRE ................................. 58
- E. POWERPOINT PHASE ONE ................................................................. 61
- F. POWERPOINT PHASE TWO ................................................................. 68
- G. CERTIFICATE OF ELDER ABUSE PREVENTION ADVOCACY ............. 77
- H. DESCRIPTION OF RECORDED TRAINING SESSION ....................... 79

## REFERENCES

.............................................
LIST OF WORKS

WORKS

1. DVD for computer viewing of one session of Phase One Elder Abuse Recognition Training at Meals on Wheels Site 2 on February 9, 2011.

2. DVD for television viewing of one session of Phase One Elder Abuse Recognition Training at Meals on Wheels Site 2 on February 9, 2011.
CHAPTER 1
INTRODUCTION

Elder abuse is an under-reported crime that has devastating and, sometimes, deadly consequences. According to the National Center on Elder Abuse (NCEA) (2010), the exact number of cases per year is uncertain since many cases are not reported. However, according to the National Council on Aging (2011), a recent national survey indicated that more than one in nine elders experience some type of elder abuse, but only one in five cases or fewer are reported. Many elders are ashamed to admit that they have been victimized, especially if the perpetrator is a family member, so the crime is not reported. Others blame themselves and prefer mistreatment at home to the option of living in a long-term facility. Some are unable or unaware of how to ask for assistance or who to call. Therefore, very few older adult victims ask for or receive needed help.

Background of the Problem

Since our American elder population (people age 65 or over) is growing at an unprecedented rate with the aging of the Baby Boomers, cases of elder abuse and neglect are also projected to increase unless society becomes more aware of this crime and takes actions to stop it (Prevratil, 2010). Los Angeles District Attorney, Steve Cooley (Cooley, 2009) concurred and called the growing elder population a “senior tsunami.” In
addition, Cooley noted that the number of reported cases of elder abuse increased from 40 per month in 2005 to 80 per month in 2009 in Los Angeles County (Cooley, 2009). The aging of the large Baby Boomer Generation (those born from 1946 through 1964) and increasing longevity are two factors that contribute to the unprecedented size of the American elder population, expected to reach about 20% of the American population by 2030 (He, Segupta, Velkoff and DeBarros, 2005). At the same time, there is a corresponding trend of increasing elder abuse cases evident in the California Adult Protective Services (APS) statistics that documented more than 104,000 reports of abuse and neglect received in 2006, up 34% since 2000 (County Welfare Directors Association of California, 2007).

Several tendencies related to the aging population converge to increase the risk of elder abuse or neglect in the future. These are: the large number of seniors aging in place at home; the increased incidences of chronic disease, loss of mobility and dementia associated with the oldest old (the fastest growing segment of the population is age 85 and over); and the subsequent isolation that is related to chronic disease, loss of mobility, loss of support systems, depression, and dementia. Research shows that isolation is a prime risk factor for elder abuse and neglect (Reeves & Wysong, 2010). The majority of seniors prefer to remain in their own homes as they age, according to a 2005 housing survey (AARP, 2005). Thus, a large proportion of elders, 93% of those 65 and older, live in independent housing (He et al., 2005). This fact, together with the isolation that often is associated with mobility problems, increased chronic illnesses associated with old age, and increased incidences of dementia in the oldest old, tends to separate elders from the community, increasing their risk of depression. As isolation, chronic illness, dementia
and mobility problems increase, so does vulnerability to elder abuse and neglect due to several factors: seniors who are isolated tend to be lonely and, therefore, willing to talk with friendly telemarketers or scammers who influence them to send money for lotteries or other fraudulent deals; loss of mobility and support systems leads to reliance on a caregiver who may not be trained or ethical, since there are no laws regulating caregiver standards; many elders hire caregivers who either physically neglect them, financially exploit them, or both; and isolation of elders often leads to depression, which may present as self-neglect.

The results of elder abuse are disastrous to the elder and the elder’s family. *Elder abuse* is a broad term that includes abandonment, emotional abuse, financial abuse or undue influence, neglect, self-neglect (including hoarding), physical abuse and sexual abuse. Victims of elder abuse experience damage to their psychological and physical wellbeing and are 300 times more at risk for premature death (National Council on Aging, 2011).

Since so much of elder abuse and neglect goes unnoticed, there is an urgent need for people who have regular contact with seniors to be vigilant. These gatekeepers need to be aware of the signs of elder abuse or neglect and to report their suspicions to the Adult Protective Services (APS) or the police department so that trained professional investigators can assess the situation. Since the life of a senior could be at risk, it is crucial that gatekeepers act as alert observers and report suspicions of elder abuse or neglect to APS for further investigation.
Statement of the Problem

Meals on Wheels (MOW) volunteers and staff in a Southern California city were not trained to recognize and report elder abuse or neglect. Volunteers needed a tool to use during their brief visits delivering food to homebound seniors and dependent adults to assist them in observing signs of senior abuse or neglect on their route. Usually, two MOW volunteers, one driver and one friendly visitor, would go out to deliver meals (one hot meal and one cold sack meal) to approximately 13 seniors per route per day, Monday through Friday. Some volunteers worked one day a week and others worked more than one day a week. The volunteers had time for only a brief interface with the elders on their route on a regular basis. According to the former Meals on Wheels Assistant Director, who has since been promoted to Administrative Director, the MOW administration and the approximately 230 volunteers were, for the most part, unaware that they needed to report their suspicions of elder abuse to their supervisor and to Adult Protective Services (J. Pelzman, personal communication, June 10, 2010). In addition, although Meals on Wheels is a national organization, neither the national or local branches had a uniform policy to train Meals on Wheels volunteers about elder abuse or a tool to facilitate the recognition of signs of elder abuse or neglect (Meals on Wheels Association of America representative, personal communication, June 9, 2010).

Purpose Statement

The purpose of this project was to develop a replicable training program on elder abuse awareness and a practical tool for Meals on Wheels volunteers to facilitate their recognition of signs of elder abuse and empower them to report suspicions of elder abuse and neglect in order to prevent its continuance.
Importance of the Project

There was an urgent need for elder abuse awareness training and the development and implementation of a tool to facilitate observations by volunteers of MOW programs. This curriculum could serve as a model for other Meals on Wheels organizations throughout the United States.

The role of Meals on Wheels volunteers as deliverers of meals is vital to the life of isolated elders, both in terms of providing nourishment that prevents malnutrition and providing some socialization for the senior, who may not see anyone else regularly from the community. This service enables seniors to continue to live at home, the preferred choice of most seniors. The goal of this city’s Meals on Wheels organization, according to their website, “is to keep them (elders) well fed and independent, in their own homes for as long as possible” (MOW, 2011).

Although these visits are brief, regular visits by MOW are opportunities for volunteers to notice changes in the appearance or demeanor of a fragile senior. A bruise or a black eye and fearful behavior of an elder, for instance, are suspicious signs of possible abuse that should be reported for the safety of the elder. Even though the MOW volunteers are not experts in gerontology or geriatrics, their observations are valuable in safeguarding the well-being of an elder. It is much better to report suspicions to the APS or police than to allow inaction to result in further abuse of an elder. Therefore, training in elder abuse awareness and a tool for use by Meals on Wheels volunteers were needed to remind the volunteer to be vigilant and to serve as an aid in noticing any signs that indicate possible elder abuse or neglect. The Elder Abuse Recognition Tool created by the project developer encouraged the volunteer to be more observant of the senior, a
caregiver’s behavior, and potentially dangerous conditions of the home that may be due to hoarding behavior or neglect.

**Project Objectives**

The objectives of this project were to apply existing knowledge from literature and experiential knowledge from qualitative research to develop a training curriculum in elder abuse recognition and a user-friendly tool to facilitate vigilant observation of elders in an effort to detect elder abuse and prevent this crime from continuing.

Project objectives included: (a) to review previously completed qualitative research by the Long Beach Health and Human Services Department of MOW collected for an elder abuse prevention grant that shadowed volunteers on their routes and took field notes in order to develop an effective and practical elder abuse recognition tool that fit into their routines; (b) to increase the awareness and knowledge about elder abuse and neglect within the MOW organization, the Board of Directors, and the volunteers through training, use of visual reminders, showing a short documentary, lectures, powerpoints, professional guest speakers and handouts; (c) to develop a user-friendly elder abuse recognition tool to assist in the detection of elder abuse or neglect for use by MOW volunteers on their rounds; (d) to monitor the implementation of the tool to adapt it if changes are needed and assess the volunteers’ utilization; and (e) to make recommendations to the MOW Board of Directors regarding other ways to promote elder abuse recognition to prevent its continuance.

**Operational Definitions**

*Adult Protective Services* (APS, n.d.) is a 24-hour California mandated program that investigates all reported at-risk situations regardless of the income of the possible
victims that involve people who are age 65 or older and dependent adults who are age 18 to 64 and are physically or mentally impaired. Referrals include cases of physical, sexual, or financial abuse, isolation, neglect, or self-neglect. The Elder Abuse Hotline and other entities are sources of referrals to APS. This agency meets with the victim in person to investigate and assess the situation, develop a case plan, and work with other agencies, such as law enforcement.

_Elder abuse_ refers to any intentional or neglectful actions of a caregiver or someone who provides services or someone in a position of trust that leads to, or may lead to, harm of an older adult (NCEA, 2010). Types of elder abuse include: abandonment, or desertion of an elder by anyone with the responsibility of care; emotional abuse, which includes verbal attacks, threats, rejection, isolation, or belittling acts that cause or could cause anxiety, pain, or distress to an elder; exploitation or financial abuse, which includes theft, fraud, misuse, or neglect of authority, undue influence used to gain control over an elder’s money or property; neglect, which is defined as the failure of a caregiver to provide for the safety, physical, and emotional needs of an elder; physical abuse, defined as the use of force to threaten or physically injure an elder; self-neglect, which is the inability of an elder to take care of his basic needs and keep his home safe (includes hoarding behavior); and sexual abuse, defined as any unwanted sexual contact imposed on an elder or anyone who is unable to give consent.

_Gatekeepers_ are people in formal or informal roles that regularly interact with seniors, whether paid or unpaid, such as Meals on Wheels volunteers.
Mandated Reporters are people who are paid or unpaid and have assumed full or partial responsibility for caring for an elder (California Welfare and Institutions Code, Section 15630, 2011). Mandated Reporters who do not report actual or suspected abuse can be charged with “a misdemeanor, punishable by a jail sentence, a fine, or both” (Community and Senior Services, County of Los Angeles, 2008).

Meals on Wheels (MOW) is the largest and oldest national organization that is made up of community-based Senior Nutrition Programs in every U.S. state and the U.S. Territories. Some MOW programs provide congregate meals at locations such as senior centers and other programs deliver meals to homes of seniors who have limited mobility, and some MOW programs offer both services. The mission of MOW is to “provide national leadership to end senior hunger” (Meals on Wheels Association of America, 2011).

Assumptions

It was assumed that MOW would adopt the elder abuse awareness training program and tool to promote the recognition and reporting of suspected elder abuse or neglect. It was presumed that the risk of legal penalties and the concern for the seniors they serve would motivate the MOW organization to be willing to change their routines to utilize the elder abuse recognition tool.

Delimitations

There were several delimitations that challenged this project. First, the training program and tool were developed for three sites of the MOW as a pilot project in English only. Second, the legal term, “mandated reporter,” could not be used in the training of MOW volunteers and staff because the MOW Board of Directors was not convinced that
volunteers were, in fact, mandated reporters of elder abuse and neglect. Rather than identifying or labeling MOW volunteers and staff as mandated reporters, the project developer and other trainers used the term, people who must report elder abuse and neglect, a category that included MOW volunteers and staff. Third, the MOW administration did not make the training mandatory for their volunteers and staff because they were concerned that the time requirement of a required training would be perceived as too much of an inconvenience and result in losing volunteers. Training was encouraged, but on a voluntary basis only. This reduced the total number of people trained. Fourth, training was restricted to only a half-hour period before the volunteers went on their routes. This restriction of time in the initial training sessions caused the project developer to decide not to include a pretest. It also resulted in the need for two separate training phases over a total of six weeks plus an evaluation phase to cover the minimum basic information on elder abuse and neglect that volunteers and staff should know, making this training project very time-consuming to complete.

Summary

This project developed a replicable training program in elder abuse awareness and recognition as well as a simple, user-friendly tool for MOW volunteers to facilitate their recognition and reporting of suspected elder abuse, neglect or self-neglect. The project developer met the stated objectives by applying existing knowledge from literature and experiential knowledge from qualitative research to develop an elder abuse awareness training program and tool. Both the training and the tool facilitated vigilant observation of elders in an effort to recognize elder abuse and prevent it from continuing. It was
hoped that this training and tool could serve as a model for other Meals on Wheels organizations throughout the United States.
CHAPTER 2
LITERATURE REVIEW

The purpose of this project was to develop a replicable training program on elder abuse awareness and a practical tool for Meals on Wheels (MOW) volunteers to facilitate their recognition of signs of elder abuse and empower them to report suspicions of elder abuse in order to prevent its continuance. The areas that were addressed in the review of literature were: the background of the problem of elder abuse and neglect; the role of MOW volunteers in serving and protecting isolated seniors; the motivation of volunteers, motivational theory, and reasons why an elder abuse awareness training and recognition tool was needed.

Background of the Problem of Elder Abuse and Neglect

Elder abuse is a crime with serious medical and psychological repercussions that is expected to increase as our population ages (Prevratil, 2010). According to the Department of Justice, a minimum of 11% of elders in America age 60 and over have been victimized by some type of elder abuse each year (National Council on Aging, 2011). Victims of elder abuse have 300 times more risk of death compared with elders who have not been abused, according to the National Council of Aging, (NCOA, 2011). Assemblymember Bonnie Lowenthal, former Chair of the Aging and Long-Term Care Committee, said that financial elder abuse “is the crime of the 21st Century...every ten seconds a senior is victimized by financial abuse” (Lowenthal, 2009). Older adults are
often targeted by scams or fraudulent caregivers and lose their life savings, leaving them destitute and no longer able to pay their bills or leave property to their loved ones as they had planned. A MetLife report released in 2009 revealed that approximately $2.6 billion per year is stolen from elders due to financial exploitation (MetLife Mature Market Institute, 2009). Financial abuse of seniors is grossly underreported, according to researchers. Approximately one in 25 cases of financial elder abuse is reported (Wasik, 2000). Susan Carbon, Director of the Office of Violence Against Women, called elder abuse of any type a “crucial public health issue” that must be addressed and stopped (Carbon, 2010).

The two-year case study by Carney, Kahan and Paris (2003) revealed both the prevalence and the complexity of the problem of elder abuse and neglect, which made abuse difficult to prove. For example, since an elder’s skin is delicate and bruises easily, not all bruises indicated elder abuse (Carney et al., 2003). They also found that there is a need for medical staff to evaluate the social situation in the elder’s home when abuse or neglect is suspected and provide services to aid the elder as well as relieve some of the stress from the caregiver. The caregiver, in the case they investigated, had physical, mental and possibly substance abuse problems. One of the identified means to relieve caregiver stress was delivery of food by Meals on Wheels. Regarding prevalence of the problem, Carney et al., stated, “it is estimated that each year, between 1.5 and 2 million older adults are abused” (p. 69). They also noted that “the elderly are the fastest growing segment of the population in the United States” (Carney et al., 2003), which concurs with more recent data from the U.S. Census Bureau projections by age (2005). The Carney et al. study recommended that the medical staff look at the evidence over time, such as
any repeated injuries on the elder noticed by a doctor, and caregiver explanations of injuries that are not consistent. They also stressed the need to be careful to respect the rights of the patient and the family. Since not all bruises are due to abuse, Carney et al. advocated analyzing the total scope of the evidence in order to provide the best care, prevent accusing people falsely and safeguard the patient. Although the findings from this in-depth case study were narrow and subjective because it used a sample of one, the conclusions regarding the complexity of elder abuse cases and the need to relieve caregiver stress are valuable. The complexity of possible elder abuse and neglect cases is one reason why it is preferable to report suspicions of abuse to APS so that trained professionals can assess the situation.

The consequences of elder abuse to victims are devastating and Wolf (1997) identified food delivery from MOW as one way to reduce caregiver stress that is associated with elder abuse. In fact, Lachs, Williams, O’Brien, Pillemer, and Charlson (1998) concurred and found clinical evidence that elder abuse and neglect is highly related to morbidity and mortality in elders. Wolf (1997) explained that victims often experience “severe emotional distress…as a result of maltreatment” (p. 163). The impact of elder abuse is multiplied by disease and aging, differentiating it from other forms of family violence (Wolf, 1997). Wolf (1997) concurred with Carney et al. (2003) that caregiver stress is a prime risk factor for elder abuse and neglect and is also often associated with victim dependency, psychopathology, and abuser dependency (Wolf, 1997). Since caregiver stress is such a common factor in elder abuse, Wolf (1997) suggested several ways to reduce this stress, including the addition of services from home skilled nurses, assistants in personal care, delivery of food from Meals on Wheels, and
helpers to do other necessary household chores (Wolf, 1997). Wolf noted that elder abuse has evolved as a concept in America from an “issue of aging” (p. 171), to a form of domestic violence, to a crime. She concluded that prevention and intervention programs are needed that take account of the multiple aspects of elder abuse (Wolf, 1997).

According to Day (2010), self-neglect can result from abuse and, conversely, elders who self-neglect are often victims of abuse. The continuum of self-neglect ranges from those elders who fail to take their medications to those who refuse to eat or drink, to those who hoard an excessive and unsafe amount of things in their homes (Day, 2010). Interventions, such as trash disposal, known as “dumpster therapy,” that are meant to help the situation, involve complex processes and are often problematic due to issues of self-determination, autonomy, and capacity assessments (Day, 2010). Thus, it is important that observation of elders who appear to be experiencing neglect, self-neglect or are hoarding be reported to APS so that professionals can make an assessment and intervention.

Isolation is a major risk factor in elder abuse. Choi, Teeters, Perez, Farar, and Thompson (2010) studied the correlation of clinical depression among recipients of Meals on Wheels and recommended that a tool to screen depression be incorporated into social service agencies routines, such as Meals on Wheels, since this organization serves a more isolated population that showed high depression rates. Severe depression is also a risk factor for suicide, to which older adults are more vulnerable than are other age groups. The Choi et al. sample used 736 MOW food recipients from a large urban area, a statistically significant sample size.
The Role of Meals on Wheels Volunteers

Meals on Wheels volunteers provide relatively affordable meals to low income, isolated frail elders on a long-term basis (Caserta, 1983), thus providing nourishment regularly and aid in delaying institutionalization. It should be noted that not all recipients are low income, but may be unable or unwilling to cook meals. Choi (1999) studied 509 people aged 60 and over who receive MOW food and found that elders remain on the program until their health deteriorates to the point that they are forced to enter a nursing home. Similarly, Caserta (1983) found that community support services, such as Meals on Wheels, respite care, home healthcare and mental health care, are necessary to prevent malnutrition in elders who may have difficulty grocery shopping and cooking food due to dementia, disability, mobility problems, or depression. Another positive attribute of MOW delivery, as well as day care, visiting nurses, and outpatient medical and mental health services, is that it allows mentally impaired community residents to remain at home rather than having to move to facilities that can be dehumanizing (Simon, 1968) and cost prohibitive. According to the 2010 MetLife Market Survey of Long-Term Care Costs (MetLife Mature Market Institute, 2010), the cost of maintaining independent living arrangements at home was far less than costs at a long-term care facility.

The Motivation of Volunteers

Finkelstien (2009) studied intrinsic and extrinsic motivations that are factors in volunteering and found that intrinsic motivation was positively related to volunteer self-concept, sociability, volunteer time and the strength of their motivation to volunteer. Internal motives for volunteering were strong factors, especially if satisfied by the type of
volunteer work itself (Finkelstien, 2009). In contrast, extrinsic motives were related to job-oriented goals (Finkelstien, 2009).

The study by Hecht and Boies (2009) gave further insight into the motivation of volunteers as associated with reported increased wellbeing. It was found that volunteering was associated with higher levels of wellbeing and more satisfaction at work as well as positive emotional states (Hecht & Boies, 2009). Therefore, another motivation for volunteering appears to be that it is emotionally and psychologically satisfying to the volunteer and helps the volunteer cope with stress at work, increasing the self-reported health of volunteers (Piliavin & Siegl, 2007).

Older adult volunteers appeared to benefit from the social connectedness of volunteering, according to Pennington & Knight (2008). Social isolation, on the other hand, was associated with higher rates of morbidity, depression, and cognitive decline (Cornwell & Waite, 2009).

Motivational Theory

Frederick Herzberg’s Two-Factor Theory of Motivation predicted how to motivate people to get work done (Herzberg, 1966). He explained that people have two types of needs, “hygiene needs” and “motivators” (Herzberg, 1966). Hygiene needs involve man’s relationship to his environment, but are not motivators. These include how people are treated on the job; salary, working conditions, supervision. Hygiene factors prevent workers’ dissatisfaction and get them to do things, but do not motivate. They get people to act by either rewarding them for doing something or punishing them if something is not done, but hygiene factors do not cause workers to want to do something (motivators). Thus, money can get a worker to do something, but it can’t make him want
to do it. Motivators, in contrast, are based on the importance of the work itself. Workers want to do work that is significant, involves learning, and results in psychological growth. Motivator factors include achievement, recognition for achievement, interesting, meaningful work, responsibility, growth, self-fulfillment, and advancement. The essential needs for motivation are training, which provides ability to the worker, and opportunity, which provides the worker ways to use his ability (Herzberg, 1966).

Although Herzberg’s theory was designed as an organizational guide for employers, the motivators are still valid for organizations that utilize volunteers. JoAnne Skelly, University of Nevada Extension Educator, in her “Motivating Volunteers” Fact Sheet, similarly describes motivators of volunteers that include achievement, affiliation, recognition, and altruism (Skelly, 2000).

**Why an Elder Abuse Awareness Training and Recognition Tool is Needed**

According to Giles, Brewer, Mosqueda, Huba, and Melchior of the Archstone Elder Abuse and Neglect Initiative (2010), some of the areas that need to be addressed in the next ten years include increasing the public awareness of elder abuse, improved identification, and intervention of cases. They note that, although research is needed, there is no time to delay action to wait for research results because the number of elders subjected to abuse is expected to increase with the burgeoning increase of the older adult population (Giles et al., 2010). They also identify the need for tools that can detect suspected or potential abuse, especially if the elder has dementia, and the need for improved training (Giles et al., 2010). Reeves and Wysong reiterate the need for tools, such as screening tools, to “serve as a way of preventing future abuse” (Reeves & Wysong, 2010, p. 331). Both articles promote increased community awareness and
education about elder abuse so that citizens will advocate for the policies and services needed to protect elders and increase awareness of this often hidden crime (Giles et al., 2010). Neither mentions a specific tool to train MOW volunteers to recognize elder abuse signs, but such a tool is consistent with their promotion of tools, in general, to increase public awareness, screen, and monitor vulnerable elders, and empower the reporting of suspicious situations. There is a lack of literature on this particular type of elder abuse recognition tool because it is not commonly in practice at MOW sites.

Summary

The literature review suggests that the problem of elder abuse and neglect is serious and growing as our elder population increases. Meals on Wheels volunteers provide a vital service to frail seniors by delivering nourishing, affordable food and enable seniors to remain in their own homes, maintaining quality of life rather than moving into a costly care facility, which most seniors want to avoid. The goal of this project was to empower MOW volunteers to become careful observers of seniors in their role as gatekeepers and as mandated reporters of elder abuse. There was no prior training in elder abuse awareness or the use of an elder abuse recognition tool at this MOW organization, nor was there such a policy or training recommended at the national level of MOW. This project proposed to close that gap by implementing an elder abuse awareness training program and recognition tool for MOW and investigating its efficacy and utilization.
CHAPTER 3

METHODOLOGY

Introduction

This project addressed the problem that Meals on Wheels volunteers in a Southern California city had not been trained to recognize and report elder abuse or neglect. Volunteers needed a tool to use during their brief visits delivering food to homebound seniors and dependent adults to assist them in checking for signs of senior abuse or neglect on their route. The purpose of this project was to develop a replicable training program on elder abuse awareness and a practical tool for Meals on Wheels volunteers to facilitate their recognition of signs of elder abuse and empower them to report suspicions of elder abuse and neglect in order to prevent its continuance. Project objectives included: (a) to review previously completed qualitative research by the Long Beach Department of Health and Human Services at a MOW in Southern California as a pilot study by shadowing volunteers on their routes, including detailed field notes, in order to develop an effective and practical elder abuse recognition tool that fits into their routines; (b) to increase the awareness and knowledge about elder abuse and neglect within the MOW organization, the Board and the volunteers through training, use of visual reminders, presenting lectures, showing a short documentary, a lecture by professional speakers, and handouts; (c) to develop a user-friendly elder abuse recognition tool to
assist in the detection of elder abuse or neglect for use by MOW volunteers on their rounds; (d) to monitor the implementation of the tool to see if changes were needed and if volunteers were utilizing it; and (e) to make recommendations to the MOW Board of Directors on additional ways to prevent future elder abuse. There was no prior training in elder abuse awareness or the use of an elder abuse recognition tool at this MOW organization, nor is there such a policy or training at the national level of MOW. This project proposed to close that gap by implementing an elder abuse awareness training program and recognition tool for MOW and investigating its efficacy and utilization.

Population, Sample Selection, and Social Context

A training program and an elder abuse recognition tool were developed for the population of volunteers of a MOW organization in Southern California which had approximately 230 volunteers that work in teams of two, one driver and one “friendly visitor,” who visit approximately 300 seniors (J. Pelzman, personal communication, November 15, 2010). This population was chosen because they constitute one of the largest groups of local gatekeepers in a large metropolitan city, and, as such, have the potential to be able to recognize, report, and prevent the elder abuse of a population of about 300 seniors weekly, if they observe and report suspicious situations.

The sample of volunteers previously shadowed as part of a grant on elder abuse prevention was a sample of convenience picked by the site supervisor. The project developer offered to train all 230 volunteers of MOW. The Administrative Director assisted in the training by asking volunteers to arrive a half hour before their regular routes to attend a half-hour training session (J. Pelzman, personal communication, November 18, 2010).
The demographic characteristics of this MOW’s volunteers were diverse, ranging from high school students to retired professionals (J. Pelzman, personal communication, September 9, 2010). The volunteers shared a willingness to donate their time and energy so that people in need receive nutritious meals. Some volunteered once a week and others twice or more days during a week, each route requiring at least two hours to complete.

The demographics of the clients served were approximately 95% aged 70 and older (some were aged 90 and older) and the rest were younger dependent adults or adults with disabilities who needed help in meal preparation (J. Pelzman, personal communication, September 9, 2010). The clients were heterogeneous, but most were frail (J. Pelzman, personal communication, September 9, 2010).

**Methodology Background**

**Overview**

The Meals on Wheels Board of Directors preferred that the volunteer first talk to his or her supervisor about any suspicious incident (J. Pelzman, personal communication, September 9, 2010). If the supervisor agreed that this could be a case of elder abuse, the supervisor would call APS with the volunteer present and available to answer any questions that might be asked by APS or the police department. This protocol made reporting less stressful for the volunteer and kept the supervisor informed of the situation. However, this procedure was not widely known by MOW volunteers (J. Pelzman, personal communication, September 9, 2010). Therefore, it needed to be well publicized and supported by all MOW staff.
The variable of volunteer motivation was crucial to the success of this project. The volunteers’ intrinsic motivation to help and care for the elders and dependent adults that they serve (Finkelstien, 2009) was verbally acknowledged, praised, and utilized in order to facilitate their acceptance of changes in their routine. Site managers and administrators of MOW reinforced the powerful role of volunteers as vigilant watchdogs in the community who provide a source of both nutrition and social contact to isolated seniors and report problematic situations.

Qualitative data

The project developer used previous qualitative observations made by the project developer in September 2010 through work at the Long Beach Department of Health and Human Services to comply with the requirements of a grant on elder abuse prevention. This research was done according to Berg’s concepts on qualitative research methods (2009) to note how volunteers interact with each other and their clients in reality. The “shadowing” revealed what MOW volunteers do on their routes daily. The project developer rode with at least two volunteers on their routes at each of three MOW sites and accompanied the “friendly visitor” when food was delivered to the recipient. Detailed field notes of observations and conversations were written after each shadowing experience and kept in a log. This information was utilized to develop a user-friendly elder abuse recognition tool that was practical and fit the routine of the volunteers. Conversations with volunteers and staff provided insight into their motivation and concerns that impacted the project developer’s approach chosen to train them. Observation of the elders and dependent adults served aided the project developer in understanding the recipient’s situation and their vulnerability to abuse.
Input and Evaluation

By attending Elder Abuse Prevention Team (EAPT) multi-disciplinary meetings, the project developer became acquainted with professionals from diverse backgrounds who are passionate about elder abuse prevention. Several of these professionals volunteered to assist in training MOW volunteers and were utilized in the second phase of training. Evaluation of the elder abuse recognition tool for MOW was conducted prior to the first training phase by several professionals who were members of the Elder Abuse Prevention Team (EAPT) and had expertise in elder abuse prevention. These professionals included: Theresa Marino, Bureau Manager, Long Beach Department of Health & Human Services and Coordinator of the EAPT, and Diane Johnson, Director of Retired & Senior Volunteer Programs (RSVP). The training was pre-approved by the Meals on Wheels Board of Directors. The documentary that was shown to MOW volunteers was previously shown to EAPT members and approved.

The project developer taught MOW volunteers the signs of elder abuse and the procedure for reporting it using information learned through research done by the project developer as a contract worker with the EAPT for the City of Long Beach Health and Human Services Department on a grant in elder abuse prevention. Presentation lectures were developed by integrating information from the training manuals of several organizations as models, including: the New York City Elder Abuse Training Police Curriculum (2005); the Curriculum on Recognizing and Responding to Elder Abuse for EMS Professionals (City of San Francisco, 2006); Keep-Save Coalition (2009), and A Guide for the Mandated Reporter (Community Services, County of Los Angeles, 2008).
Final evaluation of the use of the Elder Abuse Recognition Tool and training program was discussed with the EAPT members after Phase Three. In addition, a letter to the MOW Board was sent to the Board President that included recommendations on other ways that MOW Long Beach can prevent future elder abuse.

**Program Outline**

**Phase One**

The training was multi-faceted and in three phases. Since MOW volunteers had varied schedules and flexible work times, several training sessions were made available. The trainings began a half-hour before the volunteers went on their regular routes. The model training session presented by the project developer in Phase One was videotaped (Appendix H) so that MOW will have a permanent training tool for future training use. Also, the model session was to be replicated at each of three MOW sites through the use of the video and presented by other trained members of the Elder Abuse Prevention Team, who would be able to answer questions and concerns. This “train-the-trainer” format was devised to facilitate the training so that most, if not all, of the 230 volunteers could be involved.

The procedure for Phase One focused on gaining the trust and attention of the volunteers. First, following the Outline for Phase One (Appendix A), the project developer recognized the volunteers for their generosity and the good work that they do. The project developer briefly defined the various forms of elder abuse and illustrated warning signs for each type as listed in the Elder Abuse Prevention Team brochure, which was distributed. This part of the training was done through a lecture, using a powerpoint to present the information. The importance of the volunteers’ observations
and reporting was pointed out in the handout, *Elder Abuse is a Crime* (Adult Protective Services, 2008), which was distributed during the training sessions in Phase One. Then, the Elder Abuse Recognition Tool (Appendix B) was introduced, with an explanation of how to use it.

The easy-to-use elder abuse recognition tool (Appendix B) was patterned on the list of warning signs of elder abuse in the brochure, *A Citizen’s Guide to Preventing & Reporting Elder Abuse* (2002). It is a short acronym that is a list of red flags of elder abuse. This tool was attached to the inside cover of the route books opposite the list of the names and addresses of clients. It was important that the tool be brief and easy to use quickly since the volunteers, who start on their routes about 10:00 a.m., are on a time schedule that requires them to deliver their food no later than 1:00 p.m. to prevent spoilage (J. Pelzman, personal communication, September 9, 2010). The tool was eye-catching and convenient to use, since it was attached near where volunteers look up addresses of their clients. The project developer instructed the volunteers on how to use the tool on their routes during Phase One of the training.

Finally, the importance of reporting suspected elder abuse was emphasized and a clear procedure for reporting was taught. A sixteen-minute documentary on elder abuse, *An Age for Justice* (NCOA & WITNESS, 2009), was shown. This powerful film portrayed the devastating effects of elder abuse spoken by the victims themselves and illustrated the signs of abuse through actual cases. It also focused on the sobering fact that the majority of elder abuse goes unnoticed and unreported.
Phase Two

The second phase of training, which started two weeks after the first phase ended, was conducted almost entirely by professionals from EAPT after a train-the-trainer session taught by the project developer that detailed the presentation, which was mostly a review of previous material covered in Phase One. The project developer also interfaced with the MOW staff to schedule the training sessions at three MOW sites. The trained professionals gave a fifteen-minute talk on elder abuse, neglect and self-neglect from their perspective (Appendices C and F). This served as a reinforcement of the importance of watching out for signs of elder abuse. It was meant to encourage the volunteer to continue using the Elder Abuse Recognition Tool and report their suspicions to their supervisor, who, in conjunction with the volunteer, would call either APS or the police department. These professionals donated their time to do this training. Utilizing the testimony of a professional in the field of elder abuse prevention added credibility to the training program, and, thus, motivated the volunteer to be observant and report suspicious situations. During the last fifteen minutes of this session, volunteers answered a short multiple-choice questionnaire (Appendix D) on elder abuse that also asked the volunteer’s opinions about the Elder Abuse Recognition Tool and training. Results from this questionnaire were evaluated.

Phase Three

Phase Three was conducted as part of a comparison of qualitative data obtained prior to this project as part of a Long Beach Department of Health and Human Services grant on elder abuse prevention to report back to the funder on the effectiveness of training in elder abuse. In this phase, which began one week after the second phase
ended, the project developer shadowed volunteers, at least one at each of three sites, and observed if they were using the Elder Abuse Recognition Tool. The researcher made detailed field notes of observations. These notes were compared to the first log of observations, noting whether the volunteers were more or less observant and if they were using the tool. This comparison served as part of the evaluation component.

**Summary of Training**

In summary, the first phase of this training, presented almost entirely by the project developer, took three weeks, with a half hour training presented every day, Monday through Friday; one week at each of three MOW sites. One of the initial training sessions in Phase One was videotaped. This videotape was edited and copies can be utilized by MOW to facilitate elder abuse training of volunteers and staff in the future. The second phase of training, presented almost entirely by professionals, started two weeks after the ending of Phase One and required another three-week period of training sessions. The third phase, which began one week after the second phase ended, took the project developer three days to complete and was conducted as part of a comparison of qualitative data obtained prior to this project as part of a Long Beach Department of Health and Human Services grant on elder abuse prevention in order to report back to the funder on the effectiveness of training in elder abuse.

**Project Developer’s Role**

The role of the project developer in this endeavor was as a participant observer who was passionate about stopping elder abuse and neglect. Program components were selected through the project developer’s experience as Assistant Coordinator of the Elder Abuse Prevention Team (EAPT) through the Long Beach Department of Health and
Human Services since September 2009. Thus, this project was shaped by the project developer’s previous experience with the EAPT. The project developer became acquainted with the current Administrator of a MOW in Southern California when she presented a case of possible neglect of a bedridden elderly woman to the EAPT meeting in the spring of 2010 and requested advice. Neither the MOW volunteer, who suspected neglect, nor the site manager reported this case to APS. This situation could have had a tragic ending for the senior. After the meeting, the MOW Administrator and the project developer were convinced that training of MOW volunteers and staff was necessary.

The project developer has had numerous experiences working with the relatives of elders who called the Long Beach Health Department with concerns that their relative was either being abused or vulnerable to abuse or neglect due to possible signs of declining capacity. As part of the researcher’s job as an Elder Abuse Prevention Team Assistant Coordinator, the researcher referred the family members to agencies or services that could assist in assessing the senior and investigating the situation. The project developer has, on several occasions, made reports to APS regarding seniors who may be victims of abuse and has advised relatives or friends of the elders to call APS themselves to report suspected abuse or neglect. Also, the project developer investigated a financial abuse case of a friend’s father that resulted in the elder’s loss of over $500,000 and the embarrassment of the family. This case involved a fraudulent caregiver who pretended to befriend the elder, persuaded the elder to give her money and jewelry, and, later, fled the area, avoiding prosecution. The project developer did not encounter any ethical issues in the completion of this project.
CHAPTER 4

RESULTS

The purpose of this project was to: (a) develop a replicable training program on elder abuse awareness, (b) develop a practical tool for Meals on Wheels (MOW) volunteers and staff to facilitate their recognition of signs of elder abuse, and (c) empower MOW volunteers and staff to report suspicions of elder abuse and neglect in order to prevent its continuance.

The objectives of this project were to apply existing knowledge from literature and experiential knowledge from qualitative research to develop a training curriculum in elder abuse recognition and a user-friendly tool to facilitate vigilant observation of elders. The goals were to increase the detection of elder abuse, report it, and prevent this crime from continuing.

Phase One Training Sessions

Phase One of the elder abuse recognition training took place a half hour before volunteers left to go on their routes. A session was held once a day for a week at each of the three MOW sites, for a total of three weeks. Because volunteers have variable schedules, this assured that the majority of them had the opportunity to participate in the training. The important role of MOW volunteers in the prevention of elder abuse of the seniors they visit was emphasized in this session. In addition, the project developer presented the user-friendly elder abuse prevention tool and how to use it, as well as basic information on the types of elder abuse and neglect using a 14 minute powerpoint lecture.
(Appendix E). This powerpoint used simple language, free from jargon, to teach signs of elder abuse and how to report it. Then, the 16 minute documentary, *An Age for Justice* (NCOA & WITNESS, 2009), was shown that presented interviews with family members and victims of elder abuse. A total of 108 volunteers were trained in Phase One: 35 at Site 1; 41 at Site 2, and 32 at Site 3. This represented about 47% of the total number (230) of MOW volunteers at this organization. Handouts were also given to attendees at these sessions, including: the *City of Long Beach Department of Health & Human Services Elder Abuse Prevention Team* (2010) brochure, a copy of the slides presented in the powerpoint, a copy of the Elder Abuse Recognition Tool (Appendix B), the Department of Long Beach Health & Human Services Homeless Services Division’s *Pocket Guide Resource Directory* (2010), and the Adult Protective Services brochure, *Elder Abuse is a Crime* (2008). Of the 15 training sessions in Phase One, the project developer presented 13 trainings and a professional in elder fiduciary services, who is a member of the Elder Abuse Prevention Team (EAPT), conducted the other two trainings. One of the sessions that the project developer presented was videotaped (Appendix H) at Site 2 to facilitate future training.

**Phase Two Sessions**

A week after Phase One ended, the project developer held a train-the-trainer session with four members of the EAPT who agreed to help train MOW volunteers and staff. This session detailed the curriculum and how to present it. This material was primarily a review and reinforcement of previous material covered in Phase One with added emphasis on who is required to report elder abuse and neglect. The powerpoint
script for Phase Two was used as a guide for the trainers as well as a visual summary of
the presentation for the audience (Appendix F).

Phase Two sessions started two weeks after the first phase ended and were conducted entirely by professionals, mainly from the EAPT, including three employees of SCAN and a licensed fiduciary services expert. SCAN is a health insurance company that offers health care coverage and personal care services to assist seniors in remaining independent at home. The project developer was unable to videotape a training session in Phase Two as was proposed in Chapter 3 due to complications in the editing of the Phase One tape that took several weeks, and lack of funding and time for a second videotape.

Phase Two of the elder abuse recognition training took place a half hour before volunteers left to go on their routes, a session once a day for a week at each of three MOW sites, for a total of 15 sessions in three weeks. The project developer scheduled trainings that fit the trainers’ schedules and the times that were convenient for the MOW site managers. Part of the Phase Two training included questioning the attendees to find out if they remembered material that was presented to them two weeks earlier in Phase One. The last part of the session included handing out a questionnaire of eight multiple-choice questions (Appendix D). Attendees were asked to “Please circle the best answer.” Six of the questions were knowledge-based and the last two questions included: (a) an evaluation of the Elder Abuse Recognition Tool, and, (b) whether or not the volunteer was more likely to report suspicious situations to their site manager now, after elder abuse recognition training, than prior to the training.

Of the 108 volunteers trained in Phase One, 75 completed Phase Two, (69.4%). The percentage of correct answers to the six questions that tested knowledge of elder
abuse and neglect was 97.5%. Questions 1, 5, and 6 were answered correctly by 74, (99%), respondents ("All of the above") and not answered by one respondent. Question 2 was answered correctly by 73, (97%), respondents ("All of the above") and left blank by two respondents. Question 3 asked about persons who must report elder abuse. Seventy-two, (96%), responded "All of the above", two left the question blank, and one person identified only "clergy". To the statement in question 4, "It is estimated that only one in five cases of elder abuse are reported", 71, (95%), answered "true", three did not answer the question, and one respondent replied "false".

In response to question 7 ("Has using the Elder Abuse Recognition Tool been helpful in increasing your observations of clients and their homes during your route?"), 64, (88.3%), answered, "Yes, very helpful," and 9, (12%), answered, "Somewhat helpful." Sixty-six people, (89% of those who answered question 8), marked, "Yes, I am more likely to report" to question 8: "Are you more likely to report suspicious situations to your Site Manager now, after elder abuse recognition training, than you were prior to the training?" However, 8 respondents, (11%), gave the response, "About the same likelihood of reporting as before the training".

Certificates of Elder Abuse Prevention Advocacy (Appendix G) were created. The Administrative Director of MOW wrote the names of those who had completed the training on the certificates and presented them to the volunteers, with the assistance of the site managers, after training was completed. The project developer was not involved in this recognition of the volunteers or the presenting of Certificates.
Phase Three

The last part of the project began one week after Phase Two ended. The project developer visited each of the three MOW sites and shadowed volunteers on their routes visiting one site per day over three days, which took about six hours of observation in total, about two hours per site. These observations were made as follow-up under the auspices of the Long Beach Health Department elder abuse protection grant. The project developer was unable to shadow the same volunteers observed previously during data collection for a Health Department grant due to lack of room in the car or the request of the site manager to go on a different route.

Observations of First Shadowing

The first shadowing took place at Site 3. The project developer visited 19 clients, greeted the recipients, and handed out food. The driver on this route usually does both jobs himself. The project developer noticed that the Elder Abuse Recognition Tool was visible, attached to the left inside cover of the Route Book. Several potentially dangerous situations were noted. For example, one residence had a rickety banister that needed to be secured and one elderly lady, who had dementia, seemed confused and needed a caregiver. Also, the door of a disabled client was left unlocked. The researcher was told that it was the custom of the MOW volunteers to knock, announce their presence, and enter the residence. The project developer mentioned these situations to the driver, who later reported them to the site manager. Some of these concerns were later included in a letter from the project developer to the President of the MOW Board of Directors and the Administrative Director that recommended changes in procedure to improve the safety of clients.
Also, the driver said that a client, who lived in an apartment building, did not receive food one day because a man living in that building convinced the MOW volunteer to give him the food instead, saying that he would give it to the client. The MOW volunteers had been warned not to do this in the future.

The following observations of a driver on this route illustrated that he had heightened awareness of the vulnerability of isolated seniors: He commented that so many elders were “hidden away,” creating sort of “islands” in this part of the city. This driver showed awareness and concern for his clients. He did not appear to look at the Elder Abuse Recognition Tool, but it was clearly visible to the left of the client information cards that he studied to verify addresses.

There was diversity in the health status and living conditions of these 19 clients. Most of the recipients lived alone. Only three had caregivers that answered the door, one of these was a family member. One elderly couple was providing care for a grandchild.

Observations of Second Shadowing

The second shadowing occurred the next day at Site 2. The project developer accompanied a driver and a “Friendly Visitor,” visiting ten homes and delivering 12 meals. Caregivers answered the door at four homes. The ages of the recipients ranged from a 48 year old paraplegic to several who were over age 90. The Elder Abuse Recognition Tool was clearly visible, attached to the left inside cover of the volunteers’ Route Book. One stop was to a married couple who were both 87 years of age, but the majority of clients were single. One of the clients was very hard of hearing, making it difficult for her to know that someone was at the door and, thus, vulnerable to intruders.
Both the “Friendly Visitor” and driver on this route had been trained on elder abuse recognition and the conversation with them illustrated that this training had led to practical implementation in the personal life of the driver. She said that because of the list of signs of elder abuse and neglect that was presented in the training, she became more observant of her mother’s deteriorating condition. She has since removed her mother from a single family dwelling and placed her at a skilled nursing residence. Her mother was 80, had memory problems, needed four insulin injections per day, showed possible signs of hoarding, and needed help with her activities of daily living.

Observations of Third Shadowing

The project developer accompanied two volunteers at Site 1 two days later. Twelve clients were served. The ages of the recipients ranged from a 51 year old man, who uses a pain pump in his stomach, to a 95 year old, who has congestive heart failure. Two of the clients had caregivers present. One had no emergency contact listed, and one mentioned that she had children who call her regularly on the phone.

The following field notes illustrated that the staff and volunteers were aware of a possible neglect or self-neglect situation and were concerned about it: The site manager wanted the project developer to accompany volunteers on one particular route where there was an elderly woman who might be self-neglecting. This 95 year old client was a case previously reported to Adult Protective Services (APS) by the project developer and also assessed by a public health nurse from Senior Links, a program of the Long Beach Department of Health & Human Services. She was assessed as capable of making her own personal decisions and she chose to refuse the services of an attendant. The two MOW volunteers who regularly serve this client said that this woman had lived in that
house for 67 years and wanted to die there. They said that she needed someone to come over and assist her in bathing and in cleaning the house, but she refused help and her family did not want to spend money. The volunteers expressed frustration and concern about this client. The client met us at the door, invited us in, and engaged in limited conversation. The project developer noted that the kitchen was painted a cheerful yellow and was fairly tidy, except for a few pots and pans in the sink. There was no odor or abnormal clutter. It appeared that someone had been keeping the house cleaner and that the client was in better condition than had been previously reported to APS a few months ago.

The project developer noticed that the Elder Abuse Recognition Tool used by the volunteers mentioned in the previous paragraph, although attached to the left side of the Route Book, was not clearly visible because there was a copy of the current month’s meal schedule placed over it.

Summary

Phase One of this project resulted in the training of 108 volunteers and the videotape of one training session that could be used to train other volunteers in the future. The project developer conducted 13 out of the 15 training sessions in Phase One.

Phase Two resulted in 75 out of the original training group of 108 receiving a review of material, additional training, and completing a questionnaire. Professional providers of services to elders conducted all of the training sessions in Phase Two. Results of the questionnaire included: 97.5% of the answers to the six questions that tested for knowledge of elder abuse and neglect were correct; answers to the opinion questions showed that 88.3% considered the Elder Abuse Recognition Tool very helpful,
and 89% said that, after the training, they were more likely to report possible elder abuse than they were before.

Phase Three consisted of observations of 43 clients, nine of whom had caregivers. Most of the clients were single and lived alone. The project developer’s shadowing of volunteers revealed that the MOW staff and volunteers: (a) had a high awareness of the vulnerability of isolated seniors; (b) were implementing what they learned in the elder abuse recognition training to make decisions about loved ones in their own family; and (c) were noticing signs of possible neglect or self-neglect in their clients, even though the Elder Abuse Recognition Tool was not always clearly visible in the Route Book.
CHAPTER 5
DISCUSSION

The purpose of this project was to: (a) develop a replicable training program on elder abuse awareness, (b) develop a practical tool for Meals on Wheels (MOW) volunteers and staff to facilitate their recognition of signs of elder abuse, and (c) empower MOW volunteers and staff to report suspicions of elder abuse and neglect in order to prevent its continuance.

This project addressed the problem that Meals on Wheels volunteers and staff in Southern California were not trained to recognize and report elder abuse or neglect. The project developer created a replicable training program on elder abuse awareness, a practical tool for Meals on Wheels (MOW) volunteers and staff to facilitate their recognition of signs of elder abuse, and taught them how to report suspicions of elder abuse and neglect in order to protect older adults.

There is a need for greater community awareness about how to recognize and report elder abuse and neglect because these crimes are often not reported and are increasing. According to AARP, in 2010, 25 states reported an increase in financial exploitation calls, 20 states reported an increase in neglect calls, 13 states reported an increase in physical abuse calls, and eight states reported an increase in sexual abuse calls (Fleck & Schmidt, 2011). It is estimated that only one in five cases or fewer are reported
(NCEA, 2011), resulting in the silent, often hidden, suffering of older adults. Elder abuse and neglect cases are predicted to rise along with the increasing numbers of older Americans as the Baby Boomers reach age 65, unless community awareness of this crime increases and people are empowered to stop it (Prevratil, 2010).

Meals on Wheels (MOW) volunteers are in a unique position to notice changes in their elderly clients because of their routine visits delivering food during the week. Therefore, this organization was an appropriate choice for this pilot project. As gatekeepers, MOW volunteers and staff needed to be aware of the signs of elder abuse and neglect to protect vulnerable seniors. Also, as mandated reporters who assume partial, intermittent responsibility for caring for an elder, although unpaid, MOW volunteers have a legal duty to report suspicions of elder abuse or neglect (A Guide for the Mandated Reporter, County of Los Angeles, 2008). Since the volunteers of this MOW organization visit about 300 seniors every week, they are one of the largest gatekeeper organizations in this Southern California city.

This elder recognition training for MOW was an important project for many reasons. First, it sought to increase awareness of elder abuse and neglect in the community, teach signs to recognize it, and, potentially, save lives by reporting suspicious situations. Second, it contributed to meeting the needs of homebound seniors who were at risk of elder abuse or neglect by educating the MOW volunteers and staff about this crime, identifying suspicious signs, and teaching them how to report them. Third, the project served to change the mind-set of the MOW organization to realize the importance of training volunteers to observe the elder and the elder’s home as part of the role of the MOW volunteer, along with delivering nourishing food. Finally, this project
created a simplified elder abuse model curriculum and tool that can be used to train volunteers of other MOW organizations in the country and other organizations that utilize volunteers to serve seniors.

**Evaluation of Project**

The results of the questionnaires showed that those who finished both Phase One and Phase Two of the training had a high degree of basic knowledge about elder abuse and neglect, suggesting that the training was effective. Similarly, answers to the two opinion questions, regarding whether there was an increase in observations of clients and their homes and whether they were now more likely to report suspicious situations, were overwhelmingly positive. The eight people who responded that they had “about the same likelihood of reporting as before the training” could have had prior elder abuse and neglect training through their past or current occupations and were already likely to report elder abuse or neglect. For example, one volunteer who was shadowed by the project developer was a retired doctor and at least one was a retired teacher, occupations that would have made them already aware of the importance of reporting abuse or neglect. Since no pre-test was conducted before the training, it was impossible for the project developer to know the initial knowledge of the volunteers and staff members and compare this baseline with their knowledge at the end of the training.

Utilizing professionals in the field of aging to conduct the Phase Two trainings appeared to be an effective method, as reflected in the high percentages of correct answers to the information-based questions on the questionnaire. These high scores could have been related to the reiteration of information previously presented, as well as
the credibility of the presenters, who introduced themselves and their occupations before Phase Two sessions.

The results of Phase Three validated the effectiveness of the training by comparing qualitative data from a previous grant study to that after training as part of a Long Beach Department of Health grant report. The project developer’s observations in Phase Three were that the volunteers appeared to be observant of their clients, even though they did not always look at the Elder Abuse Recognition Tool. In one case the tool was not clearly visible. The project developer cannot compare changes in the degree of observation of these volunteers with the volunteers observed before the project started since they were not the same individuals. However, the volunteers shadowed in Phase Three were observant and expressed concern about the vulnerability of isolated seniors. Also, they appeared to be implementing what they learned in the elder abuse recognition training by making care decisions about loved ones in their own family. Some noted signs of possible neglect or self-neglect in their clients and the need for personal caregivers.

**Interpretations and Limitations**

The fact that the MOW administration did not make elder abuse and neglect training mandatory reflected their initial concern that adding required time-consuming training might be too inconvenient for the volunteers, causing a reduction in their numbers. This attitude resulted in a low percentage (33%) of total volunteers receiving the full training (75 out of 230).

Another reason that the MOW administration did not make this training mandatory was because at least one of the MOW Board of Directors disputed the fact that
their volunteers were mandated reporters. Rather than confront the MOW Board of Directors and risk rejection of the entire training project, the project developer effectively persuaded the MOW Board of Directors that this training was the right thing to do to protect the safety of their clients. The project developer chose this method based on Finkelstien’s concept of the importance of intrinsic motivations of volunteers (2009) and on the tenets of Herzberg’s Two-Factor Theory of Motivation (Herzberg, 1966), which defined motivation as strongly related to the volunteer’s perception of the importance of the work itself. The MOW Board of Directors, made up of highly motivated volunteers, agreed to this project because they cared for their clients and realized the importance of their work.

The reluctance of the MOW organization to require volunteers to attend a one-hour training, resulted in restricting the project developer to give presentations for only a half-hour at a time, scheduled just before the volunteers went on their routes. Since the minimum basic information on elder abuse and neglect required at least an hour to present, this limitation resulted in the project developer having to offer two phases of half-hour trainings over a six-week period, one week at each of the three MOW sites. This was very time-consuming and, since there was at least a one-week break between the phases, may have contributed to the fact that only 69.4% of the volunteers from Phase One went on to complete Phase Two and fill out the questionnaires. The lack of time allowed for the initial training session in Phase One (a half-hour) is also one of the reasons that the project developer chose not to conduct a pre-test of the participants.
Implementation

In response to a request by the MOW Administrative Director of this organization, the project developer wrote an article about the elder abuse recognition training conducted at this MOW for their fall 2011 newsletter. Since this newsletter was distributed to about 3,000 people, this article was an effective way of disseminating information about the training project, increase awareness of elder abuse and neglect to more people, and encourage other Meals on Wheels organizations to use this training curriculum as a model.

Recommendations for Future Projects

The project developer has three recommendations for future projects based on experience in this pilot project. First, it is recommended that future elder abuse recognition curriculum and training include both a pre-test and post-test of participants to measure their prior knowledge of the subject and compare this with the results of a post-test after training. Second, it is recommended that other organizations that utilize volunteers who work with seniors make elder abuse and neglect recognition training mandatory for their volunteers and staff so that a higher percentage of gatekeepers can be trained to recognize suspicious signs to protect the people they serve. Third, it is recommended that other volunteer organizations train their volunteers for at least a one-hour, unbroken, session to maximize the number of volunteers trained and the impact of the training. This could decrease the number of volunteers who only receive half of the training and would be much more time-efficient for the project facilitators.
Project Developer Role

The process of putting together this project was a valuable learning experience. First, before the proposed training project was accepted by the MOW Board of Directors, the project developer discovered the importance of developing a non-threatening, productive relationship with the organization’s leaders, including the MOW Board of Directors and site managers. The project developer tried to remain non-judgmental regarding issues at the MOW organization and displayed a willingness to learn about the daily activities of MOW, its impact on homebound seniors, and its role in the community. This attitude created a positive relationship between the project developer and MOW that remains today.

Another lesson learned was that it is challenging to recruit busy, over-worked professionals to get involved in a community project. However, after the project developer reported the data from Phase One of the training at an Elder Abuse Prevention Team meeting, several professionals did volunteer their time and talent for this project. Perhaps, realizing that the project was actually proceeding, that the sessions took only a half-hour of work time (after the initial one-hour training), and a shared motivation to prevent elder abuse and neglect were instrumental factors in the recruitment of professionals. The project developer had originally hoped to involve members of the Adult Protective Services, but their heavy workload made them unavailable.

The train-the-trainer format of Phase Two required the project developer, a relative newcomer in the aging field, to organize and train professionals in the field of aging to use the project curriculum. The personal insight gained in this process was that, although professionals had more years of experience in the field of aging, they were
receptive to using a simplified curriculum to attain the shared goal of protecting seniors by training volunteers who serve them. This experience resulted in increasing the management skills and confidence of the project developer to implement innovative ideas in the future. It also served to energize the Elder Abuse Prevention Team in a worthwhile community project.

**Project Outcomes**

Several positive changes in the Long Beach MOW organization have occurred in the last four months since this project ended. After Phase Three, the project developer wrote a letter to the President of the MOW Board of Directors and sent a copy to the MOW Administrative Director that summarized the results of the project and made two concrete recommendations regarding safety concerns noticed while shadowing the MOW volunteers. One concern was that some of the clients, especially those with mobility problems, left their doors unlocked so that the MOW volunteer could enter easily and the client wouldn’t have to go to the door. Since some of these same clients also had hearing problems, they were vulnerable to anyone entering their home. The project developer recommended that the MOW volunteers obtain a copy of the house keys of these clients so that the clients’ doors could remain locked. The President of the MOW Board of Directors replied that this occurred in only a very few cases, but that the site managers would ask for copies of the house keys of these clients in the future (J. Pedneault, personal communication, May 23, 2011).

Another safety recommendation that the project developer made to the President of the MOW Board of Directors was to change the MOW volunteer application form. Criminal background checks of volunteers are not currently done and are expensive to
cover 230 volunteers. However, the application form could be written to imply that
criminal background checks would be done by a statement, such as, “As a volunteer for
Meals on Wheels, you are subject to a complete criminal background check.” This
implication of a background check might be enough to dissuade dishonest people from
applying as volunteers. The President of the MOW Board of Directors said that this
change would be implemented (J. Pedneault, personal communication, May 23, 2011).
However, it was not, as yet, included on the current MOW website application (Meals on
Wheels, 2011).

A sign that the attitude of MOW about elder abuse training changed in a positive
manner after the project ended was that the MOW Administrative Director revised the
MOW website (Meals on Wheels, 2011) so that it now requires new volunteers to watch
the training video of the project developer presenting a training in Phase One and answer
the Questionnaire before certification and acceptance as a new MOW volunteer. Also,
the website was changed to include the elder abuse documentary, *An Age for Justice*
(NCOA & WITNESS, 2009), and a link to the recent testimony of Mickey Rooney
speaking to the Congress about his own elder abuse case (Meals on Wheels, 2011).
Fortunately, Mickey Rooney’s testimony before the Senate Special Committee on Aging
(Fleck & Schmidt, 2011) occurred on March 2, 2011, coinciding with the interval
between Phase One and Phase Two of the elder abuse recognition training project. Since
this testimony attracted widespread press coverage, it may have added credibility to the
prevalence and importance of the problem plus the urgency to recognize this crime and
report it. The fact that a celebrity with as much wealth, intelligence, and popularity as
Mickey Rooney had become a victim of financial elder abuse and physical neglect at the hands of family members reinforced the point that anyone can become a victim.

In addition, the project developer was asked to join the MOW Board of Directors and accepted. As a Board member, the project developer will have a vote regarding future training of volunteers and other issues that affect the safety and wellbeing of seniors in the community.

Another ramification of this project was that, after the project ended, the project developer was asked by the Director of Retired & Senior Volunteer Program (RSVP) to present a similar training on elder abuse and neglect recognition to 30 Long Beach Senior Police Partners (SPP), including nine new recruits. Senior Police Partners are older adult volunteers who assist the Long Beach Police Department by visiting with seniors in the community and connecting seniors to the services that are needed. As gatekeepers, they, also, are in a position to discover possible elder abuse or neglect situations and report it. The project developer conducted a one-hour elder abuse and neglect recognition training to SPP on August 10, 2011. Thus, the implication of this pilot project was that other local organizations that utilize volunteers have asked the project developer for a version of the training. This could produce consistent elder abuse training for volunteers who work with older adults and increase awareness and prevention of this crime substantially in the community.
APPENDIX A

PHASE ONE - LECTURE OUTLINE
Elder Abuse Recognition Training – Phase One

I. The importance of the work that you do as MOW volunteers

A. Provide nourishing, affordable meals to homebound seniors and dependent adults which allow them to live independently at home

B. Visit with seniors and dependent adults regularly, providing them with a friendly contact with the community

C. Generously share your time, energy and friendship with those less fortunate

D. Care about the well being of others

II. What is Elder Abuse?

A. The physical, sexual, emotional or financial abuse or neglect or abandonment of an older adult by a family member, friend, fiduciary or caregiver

1. Physical abuse: causing physical pain or injury. It includes hitting, slapping, shoving, cutting, burning, forcible restraint

2. Sexual Abuse: any non-consensual sexual contact, or sexual contact with a person who is incapable of giving consent

3. Neglect: the refusal or failure to carry out a care-giving responsibility, whether it is unintentional or intentional; can include abandonment

4. Psychological/Emotional Abuse: mental pain caused by name calling, insulting, ignoring, threatening, isolating, demeaning, and/or controlling behavior

5. Financial Exploitation: illegal or improper use of the resources of an older adult for personal benefit, profit, or gain; includes misuse of a Power of Attorney

B. Note: More than one form of abuse may be occurring at the same time

III. Signs of Elder Abuse that you may notice as a MOW volunteer
A. Signs in the Elderly Victim

- Inadequately explained bruises, cuts, sprains, broken bones, dislocations, scratches, or burns
- Dehydration or malnutrition without an illness related cause
- Appears overly medicated or overly sedated
- Indications of unusual confinement and isolation
- Lack of cleanliness, grooming
- Fear of speaking for oneself in the presence of caretaker
- Shame, fear, embarrassment
- Unusual weight loss
- Frayed or stained clothing
- Extremely withdrawn behavior
- Demented person left unsupervised
- Extremely depressed, crying

B. Signs in the Suspected Abuser/Caregiver

- Gives conflicting stories; offers inconsistent or implausible explanations for the victim’s injuries
- Is reluctant to let the elderly person talk
- Speaks for the elderly person
- Handles the elderly person roughly or in a manner that is threatening, manipulative, or insulting
- Caregiver appears to be drunk or under the influence of drugs
- Appears indifferent or angry towards the older adult
- Is reluctant to, or fails to, assist or attend to the older person
C. Environmental Signs

- Lack of food in the home
- Lack of heat or electricity
- Strong odors (e.g., feces or urine)
- Unsanitary living conditions (feces, bugs, dirt),
- Hoarding conditions (piles of stuff in the house)
- Mail piled up, unopened
- A mistreated or malnourished pet

D. Signs of Financial Exploitation

- Elder expresses stress about his financial situation
- Numerous unpaid bills, eviction notices piled up
- Missing personal belongings, cash, papers, credit cards
- Elder can no longer afford to pay for his MOW meals
- Frequent expensive gifts from elder to caregiver
- Caregiver’s refusal to spend money on elder
APPENDIX B

ELDER ABUSE RECOGNITION TOOL
ELDER ABUSE RECOGNITION TOOL
FOR MEALS ON WHEELS VOLUNTEERS

You may be able to protect an elder from abuse or neglect. If you notice any of these signs, speak with your Site Manager ASAP!

E - Extremely withdrawn behavior
L - Lots of mail piled up
D - Demented person left unsupervised
E - Elder appears/acts fearful
R - Restriction or isolation of elder by caregiver

A - Any injury incompatible with explanations
B - Bruises, burn marks
U - Unclean and lack of grooming
S - Scratches/sores
E - Extreme depression, crying

H - Hoarding (piles of things in house)
U - Uncombed, matted hair
R - Ripped or bloody clothing
T - Threatening of a senior
S - Smells badly (the elder or the home)

Developed by Rosemary Lewallen and the Elder Abuse Prevention Team, Long Beach Dept. of Health & Human Services (CA), supported by the Archstone Foundation 1/21/11
APPENDIX C

PHASE TWO – LECTURE OUTLINE
PHASE TWO – LECTURE OUTLINE

I. What is considered elder abuse? A brief review:
   A. Physical abuse: includes hitting or restraining
   B. Emotional Abuse: includes verbal belittling of an elder
   C. Financial Abuse: includes identity theft or misappropriation of fiscal resources
   D. Neglect or Self-Neglect: includes hoarding

II. Who perpetrates abuse in most cases?
   A. Someone in a position of trust, such as a family member or caregiver
   B. Telemarketers and other scammers target seniors
      --70% of the nation’s wealth is held by seniors
      --take advantage of cognitive decline or early dementia in elders
      --take advantage of loneliness by befriending senior

III. Who Must Report Elder Abuse?
   A. People who must report suspicions of elder abuse include:
      • Persons, including volunteers, who have assumed full or intermittent responsibility for the care or custody of an elder or dependent adult, (whether or not they are paid for their services)
      • Administrators, supervisors and licensed staff of a public or private facility that provides care or services for elders or dependent adults
      • Elder or dependent adult care custodians
      • Health practitioners, physicians and medical professionals
      • Clergy members
      • Banks and Financial Institutions
      • Employees of County Adult Protective Services Agencies
      • Local Law Enforcement Agencies

   B. What Does the Law Require?
      • The reporter observes or has knowledge of an incident that reasonably appears to be abuse, or
      • The reporter is told of an incident by the victim, or
      • The reporter reasonably suspects abuse.
      • The law encourages reporting of known or suspected incidents of treatment resulting in mental suffering, deprivation by a caregiver
      • Report all instances of alleged abuse of any type of an elder or dependent adult, even if the victim does not desire prosecution
C. How do you report elder abuse as a MOW volunteer?

- Speak to your Site Manager about the situation
- If the situation appears to be elder abuse or neglect, the Site Manager will call APS or the police with the volunteer present to answer questions.
  
  Adult Protective Services (APS) for Los Angeles County:
  Telephone: (888) 202-4248   Fax: (213) 738-6485
  After Hrs. phone: (877) 477-3646

- If the report involves possible criminal activity, it may be reported to the local law enforcement agency by dialing 911.
- For Los Angeles County, the Elder Abuse and Neglect 24-hour hotline is (877) 477-3646.
APPENDIX D

ELDER ABUSE RECOGNITION QUESTIONNAIRE
ELDER ABUSE RECOGNITION QUESTIONNAIRE

Please circle the **best** answer:

1. Which of the following are considered elder abuse?
   a) Identity theft
   b) Verbal belittling of an older adult
   c) Neglect
   d) All of the above

2. Possible signs of elder abuse or neglect include:
   a) Extremely withdrawn behavior
   b) Welts
   c) Unexplained bruises
   d) Fearful behavior
   e) All of the above

3. People who must report elder abuse include:
   a) Unpaid volunteers who help seniors on a regular basis
   b) Clergy
   c) Bank personnel
   d) Doctors
   e) All of above

4. It is estimated that only one in five cases of elder abuse are reported.
   a) True
   b) False
5. Types of elder abuse include:
   a) Financial exploitation
   b) Self-neglect
   c) Neglect
   d) Physical abuse
   e) All of the above

6. In the majority of cases of elder abuse by a known perpetrator, the perpetrator is:
   a) A robber
   b) A family member, caregiver or trusted individual
   c) A mugger
   d) A gang member

7. Has using the Elder Abuse Recognition Tool been helpful in increasing your observations of clients and their homes during your route?
   a) Yes, very helpful
   b) Somewhat helpful
   c) No, not helpful

8. Are you more likely to report suspicious situations to your Site Manager now, after elder abuse recognition training, than you were prior to the training?
   a) Yes, I am more likely to report.
   b) About the same likelihood of reporting as before the training.
   c) No, I am not more likely to report
APPENDIX E

POWERPOINT PHASE ONE
PHASE 1: ELDER ABUSE RECOGNITION TRAINING

Developed for MEALS ON WHEELS, XXX (MOW)

Presented by the Elder Abuse Prevention Team, Long Beach Dept. of Health & Human Services, supported by the Archstone Foundation

WHY YOUR WORK AT MOW IS IMPORTANT & WORTHY OF PRAISE

• You provide **nourishing, affordable meals** to homebound seniors and dependent adults, preventing malnutrition and allowing people to live independently at home.

• Your **friendly visit** provides isolated people a needed **social contact** and a **connection to their community**.

• You generously **share your time, energy and friendship**.

• **You care** about others and want to help them.
What is Elder Abuse?

- Physical, sexual, emotional, financial abuse, neglect, self-neglect or abandonment of a senior.
- Perpetrator may be a trusted family member, friend, fiduciary or caregiver
  - Approximately 90% of known perpetrators of elder abuse are family members

--Note: More than 1 form of abuse may be occurring at the same time.

Types of Elder Abuse Defined

- **Physical abuse:** causing physical pain or injury: includes hitting, slapping, shoving, cutting, burning, forcible restraint

- **Sexual abuse:** Any non-consensual sexual contact, or sexual contact with a person who is incapable of giving consent (mental problems)
More Definitions of Types of Elder Abuse

- **Neglect & Self-neglect**: the refusal or failure to carry out a care-giving responsibility, whether unintentionally or intentionally (includes abandonment); failure or inability to care for oneself (includes hoarding)

- **Psychological/Emotional**: mental pain caused by name calling, insulting, ignoring, threatening, isolating, demeaning and/or controlling behavior

Elder Abuse Forms Continued

- **Financial Exploitation**: illegal or improper use of an elder’s resources for personal profit, benefit or gain; includes misuse of a Power of Attorney

  - Seniors are targeted by scammers because about 70% of the nation’s wealth are in the hands of seniors.
The Elder Abuse Recognition Tool

- E - Extremely withdrawn behavior
- L - Lots of mail piled up
- D - Demented person left unsupervised
- E - Elder appears/acts fearful
- R - Restriction or isolation of elder by caregiver

- A - Any injury incompatible with explanations
- B - Bruises, burn marks
- U - Unclean and lack of grooming
- S - Scratches/sores
- E - Extreme depression, crying

- H - Hoarding (piles of things in house)
- U - Uncombed, matted hair
- R - Ripped or bloody clothing
- T - Threatening of a senior
- S - Smells badly (the elder or the home)

MOW Reporting Procedure

- If you notice any of the signs of elder abuse or neglect, speak with your Site Manager.

- Together, the volunteer and Site Manager will decide whether to call Adult Protective Services (APS) or 911 for the police (if criminal activity is suspected or there is imminent danger).
Other Signs of Abuse or Neglect

- Person appears overly medicated or sedated
- Unusual weight loss
- Lack of food, heat, electricity in home
- A mistreated or malnourished pet

Signs of Financial Exploitation

- Elder expresses stress about finances
- Elder can no longer afford to pay for MOW meals
- Expensive gifts from elder to caregiver
- Caregiver’s refusal to spend money on elder
- Missing personal belongings, cash, papers, credit cards
- Numerous unpaid bills, eviction notices piled up
Signs in Suspected Abuser/Caregiver

- Gives conflicting stories; inconsistent or implausible explanations for victim’s injuries
- Is reluctant to let the senior speak
- Handles the elder roughly or in a threatening, manipulative or insulting manner
- Caregiver appears to be drunk or under the influence of drugs
- Caregiver appears indifferent or angry towards elder
- Is reluctant to, or fails to, assist or attend to the elder

You may be able to protect an elder from abuse or neglect!

- Less than 1 out of 5 cases of elder abuse are reported
- As more people are living longer and “aging in place,” the rates of elder abuse and neglect are also increasing.
- It is far better to report your suspicions of elder abuse, than to allow an elder to continue to suffer. Note: You don’t have to prove elder abuse is occurring, but if you have reasonable concerns, a report to APS or the police will alert professionals to assess the situation.
APPENDIX F

POWERPOINT PHASE TWO
PHASE 2: ELDER ABUSE RECOGNITION TRAINING

Developed for MEALS ON WHEELS XXX (MOW)

Presented by the Elder Abuse Prevention Team, Long Beach Dept. of Health & Human Services, supported by the Archstone Foundation

What is elder abuse?
A brief review:

- Physical abuse: includes hitting or forcible restraint of an elder

  Can you think of other means of physical abuse?
Answer: More Types of Physical Elder Abuse Include:

- Slapping
- Shoving
- Cutting
- Burning

What is Emotional or Psychological Elder Abuse?

- Emotional/Psychological abuse: includes verbal belittling of an elder

– What else does emotional or psychological abuse include?
Answer: More Types of Emotional or Psychological Elder Abuse Include:

- Name calling
- Insulting
- Ignoring
- Threatening
- Isolating
- Demeaning
- Controlling behavior

What is Financial Elder Abuse or Exploitation?

- **Financial Abuse:** includes identity theft or misappropriation of fiscal resources

  - What else does financial abuse include?
Answer: More Examples of Financial Elder Abuse Include:

- Misuse of a Power of Attorney
- Stealing credit cards
- Stealing jewelry or other property of elder
- Stealing papers or documents of an elder
- Stealing cash
- Any improper use of an elder’s resources for another’s personal profit, benefit or gain

What is Neglect?

- Neglect is the refusal or failure to carry out a care-giving responsibility, whether unintentionally or intentionally.

  - Neglect includes ____________ of an elder.
Answer: Neglect includes abandonment of an elder.

- **Self-neglect** is the failure or inability to care for oneself.

  - What type of behavior is included in self-neglect?

Answer: **Hoarding** is included in self-neglect.

- **Sexual abuse** is any non-consensual sexual contact or sexual contact with a person who is incapable of giving consent (such as, someone who has mental illness).
Who perpetrates abuse in most cases?

- Someone who is in a position of trust, such as a family member, caregiver or fiduciary
- Telemarketers and other scammers target seniors because—
  - Approximately 70% of the nation’s wealth is held by seniors
  - Scammers take advantage of cognitive decline
  - Scammers take advantage of loneliness

Who must report elder abuse?

- Persons, including volunteers, who have assumed full or intermittent responsibility for the care or custody of an elder or dependent adult, whether or not they are paid

- Administrators, supervisors & licensed staff of a public or private facility that provides care or services for elders or dependent adults

- Elder or dependent adult care custodians
Who else must report elder abuse?

- Employees of County Adult Protective Services Agencies (APS)
- Local Law Enforcement Agencies
- Clergy members
- Personnel of banks & financial institutions
- Health practitioners, physicians & medical professionals

What does the law require?

- **Report** when reporter observes or has knowledge of an incident that reasonably appears to be abuse
- **Report** if the reporter is told of an incident by the victim
- **Report** if the reporter reasonably suspects abuse or neglect
- The law encourages reporting of known or suspected incidents of treatment resulting in mental suffering, deprivation by a caregiver
- **Report** all instances of alleged abuse of an elder or dependent adult of any type, even if the victim does not desire prosecution
How do you report elder abuse or neglect as a MOW volunteer?

- Speak to your Site Manager about the situation ASAP

- If the situation appears to be elder abuse or neglect, the Site manager will call Adult Protective Services (APS) or the police with the volunteer present to answer questions.

  - Adult Protective Services for Los Angeles County:
  - Phone: (888) 202-4248  Fax: (213) 738-6485
  - After Hrs. phone: (877) 477-3646

Additional Ways to Report Elder Abuse & Neglect

- If the situation involves possible criminal activity, it should be reported to the local law enforcement agency by dialing 911.

- For Los Angeles County, the Elder Abuse and Neglect 24-hour hotline is (877) 477-3646.
APPENDIX G

CERTIFICATE OF ELDER ABUSE PREVENTION ADVOCACY
Certificate Of Elder Abuse Prevention Advocacy

To honor _________________ upon completion of training on How to Recognize Elder Abuse developed for Meals on Wheels, XXX volunteers and staff from the

City of Long Beach Department of Health and Human Services Elder Abuse Prevention Program

_____________________________________________________________________

Theresa Marino, Bureau Manager

Date _____________________
APPENDIX G

DESCRIPTION OF RECORDED TRAINING SESSION
DESCRIPTION OF RECORDED TRAINING SESSION

A videotape of the project developer conducting the Elder Abuse Recognition training session to Meals on Wheels (MOW) volunteers and staff during Phase One of this pilot project took place at MOW Site 2 on February 9, 2011. This training was videotaped by Dr. Cheryl Matheiu, Director of Aging Pro. It is 15 minutes in length and represents about half of the training session. The other half of the session was spent showing the documentary, *An Age for Justice* (NCOA & WITNESS, 2009). DVDs of this training session in two forms, one for computer use and one for television use, are archived in the University Library at California State University, Long Beach.
REFERENCES
REFERENCES


City of Long Beach Department of Health and Human Services. (2010). *Elder Abuse Prevention Team* [brochure].

Community and Senior Services Department, County of Los Angeles. (2008). *A Guide for the Mandated Reporter, Reporting elder and dependent abuse* [Brochure].


Council on Aging, Orange County. (n.d.). *It’s the law, mandated reporters must report suspected elder and dependent adult abuse* [pocket card].

County Welfare Director’s Association of California. (2007, March). *Fact Sheet: Adult Protective Services Program*.


