APS Leadership Development Framework

APS LEADERSHIP DEVELOPMENT PLAN

KRISTA BROWN
CURRICULUM & TRAINING PROJECT CONSULTANT

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Introduction

In early 2019, the Adult Protective Services Workforce Innovations (APSWI), a program of the Academy for Professional Excellence, San Diego State University School of Social Work, commissioned work on a two-phase leadership development project. The goal of the project is to develop a statewide Adult Protective Services Leadership Development Framework for managers which includes a research report and leadership workforce development plan.

This document encompasses the second phase or the Leadership Development Plan for APS Supervisors and APS/Adult Service Managers. It leverages research and information from the Adult Protective Services Leadership Development Framework research report (Phase 1) as well as the National Adult Protective Services Association, Administration for Community Living, County Welfare Directors Association, California Department of Social Services, and California Regional Training Academies.

Information will be presented in four sections covering:

- APS Supervisor Leadership Development Plan
- APS/Adult Service Manager Leadership Development Plan
- Next Steps and Planning for the Future
- Conclusion

APS Supervisor Leadership Development Plan

APS Supervisors provide a combination of case oversight, approval of key decisions, case direction, problem-solving, and support and encouragement to the worker (Administration on Community Living, 2016).

APS Supervisors have a vital, multi-faceted role which requires training and support. Historically in California, there has been a lack of funding to develop and deliver standardized APS Supervisor training consistently. Additionally, supervisors often lack the time and support for training and professional development opportunities due to the demands of the position.[i]

The National Adult Protective Services Association (NAPSA) Recommended Minimum Program Standards documents the importance of high-quality training materials and opportunities for all APS Professionals throughout the country. [ii] The ACL Final National Voluntary Consensus Guidelines for State Adult Protective Services Systems takes NAPSA's minimum program standards and incorporates them into a guideline dedicated entirely to training, including APS Supervisors. [iii]

The following APS Supervisor Training Plan incorporates research and information from the Adult Protective Services Leadership Development Framework research report (Phase 1) as well as work completed by the National Adult Protective Services Association, County Welfare Directors Association, California Department of Social Services, and California Regional Training Academies.

APS Supervisor Training Plan

- **Important considerations for APS Supervisor training development and delivery:**
    - Historically there has been a lack of resources to develop and offer supervisor training consistently.
    - Supervisors lack time to attend training; spend a lot of time on administrative tasks.
    - Supervisors are not hired in cohorts – they need flexible/accessible trainings.
    - Supervisors may be promoted from within the department/unit or from other departments/units/divisions.

- **Leverage existing content and resources:**
    - APS Core trainings on critical topics (eLearning/Transfer of Learning (TOL) guides
    - Field Guide for APS – Update guide to reflect the availability of all Core Competency eLearnings.
    - APS Supervisor Core Training Competencies – developed by NAPSA Education Committee 2012/2013

- Four to Five APS Supervisor Modules developed by National APS Training Partnership and Protective Services Operations Committee (PSOC). Modality: instructor-led learning (ILT).
  - Note: *Teambuilding for APS Professionals* was piloted in 2013 but not published to date. More research will need to be done as to why and what needs to be done to finalize.
- California Specific – CWDA Resources: APS Guidelines to Supplement Regulations; MOU Templates – Ombudsman and Public Guardian; APS Cross Reporting and Referral Guide.

- **Revise** existing content as needed based on Phase 1 research report findings, CA Curriculum Advisory Committee focus group feedback and models from other states/jurisdictions.

- **Training plan** includes topics (foundational/advanced), structure, sequencing, modalities, use of emerging technologies, etc.

- **Topics**
  - **APS Supervisor Core Academy** (based on APS Supervisor Core Competency Roadmap ver. 11/2013):
    - Competency 1 -Understanding Self as Supervisor – include self-assessment component (i.e. DiSC and/or Meyers Briggs); transitioning from Peer to Manager for new Supervisors; critical thinking and problem solving
    - Competency 2 – Foundations of Effective Supervision – include Appreciative Inquiry/Appreciative Leadership models
    - Competency 3 – Teambuilding for APS Professionals – include diversity and cultural competency; include Appreciative Inquiry/Appreciative Leadership models
    - Competency 4 – APS Supervisor as Trainer – include training on APS Core and transfer of learning guides; utilizing Field Guide for APS; utilizing CWDA APS Guidelines to Supplement Regulations (CA specific); training on documentation, interviewing and developing rapport; coaching.
    - Competency 5 - Management of Personnel Issues (this may be part of agency HR training, cover unique aspects of APS supervision).
    - Competency 6 – Data and Fiscal Operations – include critical thinking and analysis.
    - Competency 7 – Safety & Self Care – include workplace safety; emergency preparedness and response.
    - Competency 8 - Collaboration & Resources – include CWDA APS Guidelines to Supplement Regulations, MOUs with Ombudsman and Public Guardian Programs, Cross Reporting Referral Guide.

  - **APS Supervisor Advanced Topics**:
    - Critical Thinking & Problem Solving
    - Capacity and Decision-making
    - Advanced Interviewing
    - Supervising Financial Exploitation Cases

- o **Critical APS Core Trainings for New APS Supervisors** (if they have not previously taken course). Modality: eLearning
  - Module 9 - Communication and Interviewing
  - Module 10 – Self-Neglect Clients
  - Module 12: Financial Exploitation
  - Module 15: Documentation and Report Writing
  - Module 17: Assessing Client Capacity
  - Module 18: Risk Assessment
- o *If Supervisor is promoted from outside of APS, it is recommended they complete all 23 APS Core Competency eLearnings.*

- **Modalities**
  - o Utilize multiple modalities including micro-learning or bursts, instructor-led training (ILT), eLearning, webinars, podcasts, apps/social media, virtual reality, etc.
    - "Blended to the Max" – combination of ILT, web seminar, eLearning.
    - Incorporate team-based learning into supervision and/or team meetings for micro-learning/training bursts/reinforcement – help to develop "leadership capital" and "leaderful" team/department.
    - "Supervisor Roundtable"- Monthly web seminars with polling and breakouts or in-person meetings – used for foundational and advanced topics.
    - Quarterly instructor-led training (ideally).
    - Flexible, asynchronous eLearning – self-standing or to accompany ILT and web seminars.
    - Podcasts - 15-30 min on foundational and advanced topics – new topics or recordings of web seminars.
    - Develop an APS Supervisor app as quick training/reference/reinforcement; tip sheets; definitions; case study examples; chat/networking function. Or leverage appropriate social media tools – LinkedIn Group, Facebook, etc.
- **Sequencing**
  - o All new APS Supervisors complete an eLearning or series of eLearnings on critical information needed to perform the supervisory position in the short-term. This information can be culled from the APS Supervisor Core Academy Competencies.

  - o The APS Supervisor Core Academy is offered on a rolling basis throughout the year and new APS Supervisors complete training in all eight identified competencies within the first year of beginning the position. Trainings offered in a multi-modal, flexible manner leveraging instructor-led, distance, peer to peer learning and accessible existing and emerging technologies.

  - o It is recommended that new APS Supervisors complete APS Core Competency eLearning training on critical topics (six topics identified) within the first 3-6 months of beginning the position. If the new Supervisor is promoted from outside of APS, it is recommended they complete all 23 APS Core Competency eLearnings within the first year.

  - o It is recommended transfer of learning tools be developed for APS Supervisor Core Academy trainings to assist APS Managers with on the job training, knowledge and skill reinforcement, and team building. APS Managers are encouraged to utilize existing APS Core Competency training transfer of learning tools such as the Field Guide for APS.

APS Supervisor Core Training Competencies – v. 11/4/13

Specialized Supervisor Trainings:

➢ **APS Supervisor as Trainer (Available In-Person and Webinar)**
   ✓ After participating in this workshop, frontline supervisors will gain an understanding of the basic tenets of Kolb's Experiential Adult Learning Theory and participants will be able to articulate the responsibility of the supervisor in promoting effective adult learning when facilitating training of new APS workers.

   ✓ Participants will be able to assess a new worker's learning style enabling supervisors to provide appropriate and targeted training; participants will be able to correctly apply at least one new training strategy in order to reinforce the NAPSA Core Competency skills.

   ✓ Frontline supervisors will learn how to implement training techniques, such as asking open ended questions, which will enhance the new worker's acquisition of critical thinking skills.

   ✓ Frontline supervisors will learn how to utilize two established tools that can be utilized to evaluate a new APS worker's integration of the training materials.

   ✓ During the session, frontline supervisors will practice providing supportive, critical feedback so that they may acquire skills enabling them to effectively reflect on a new worker's performance throughout the training period.

➢ **Working with Less: Coping During Times of Scarce Resources (Available In-Person & Webinar)**

   ✓ Demonstrate screening and prioritizing clients based upon their level of risk for experiencing abuse or neglect.

   ✓ Train intake workers on how to screen low-risk clients over the phone, through referrals to community resources and support services.

   ✓ Describe how interagency collaborations can enhance their ability to serve APS clients in the midst of staffing reductions.

   ✓ Demonstrate techniques to recruit one new, multi-disciplinary partner.

   ✓ Practice providing supportive feedback to workers that are showing signs of stress and burnout, and who appear to be underperforming.

   ✓ Practice self-care techniques and demonstrate them to APS field workers with the goal of reducing staff burnout and enhancing performance.

APS Supervisor Core Series

➢ **Module 1 - Understanding Self as Supervisor (Available In-Person)**

- ✓ Identify roles of APS Supervisor and assess your competency in each role.
- ✓ Learn to integrate strengths-based leadership skills into current supervision style to increase staff performance.
- ✓ Identify appropriate uses of training, mentoring, and coaching skills and apply these skills with staff.
- ✓ Describe personal vision for effective and productive work environment and identify steps to implement change.
- ✓ Identify issues relating to professional boundaries and learn strategies for managing these issues.

➢ **Module 2 - Foundations of Effective Supervision (Available In-Person)**
- ✓ Recognize the components of APS culture and how they impact the APS supervisor's role.
- ✓ Identify three key roles for the APS supervisor and practice elements from these roles.
- ✓ Identify and practice case elements of case consultations.
- ✓ Describe key elements for quality assurance via the case review process.
- ✓ Assess ways to effectively structure and utilize unit meetings.

➢ **Module 3 - Teambuilding for APS Professionals (Piloted, in revision)**
- ✓ Define the characteristics that make up a healthy and effective team.
- ✓ Evaluate and assess your strengths as a team leader.
- ✓ Practice Learning Circle techniques for team building.
- ✓ Identify the stages of cultural competency and name two ways that diversity strengthens teams.
- ✓ Learn strategies for managing challenging teams and/or individuals.

APS Supervisor Core Modules to be developed:

➢ **Data and Fiscal Operations (may want to consider developing last/less of an issue for state administered programs)**
- ✓ Identify the importance of strategic planning and steps for strategic planning for/with your unit
- ✓ Describe the role of data in APS advocacy, legislation and promising practice development
- ✓ Identify key concepts and terminology related to case outcome measurements and their importance in evaluating case closures
- ✓ Describe the function of the SOC 242 and the supervisor's role in monthly reporting
- ✓ Demonstrate the ability to calculate personnel and case costs
- ✓ Identify program funding sources and allocations
- ✓ Add objective around grants and grant writing??

- **Management of Personnel Issues (some agencies/states send staff to HSS dept trainings for this topic)**
  - ✓ Identify factors related to staff performance concerns including discipline and case compliance issues
  - ✓ Describe the role that performance measures, data, and supervisor documentation have in the evaluation of staff performance
  - ✓ Identity approaches in effectively addressing staff behaviors (difficult, aggressive, resistant, etc.) or issues
  - ✓ Practice completing a performance plan and presenting it to a staff member exhibiting performance issues
  - ✓ Describe the supervisor's role in progressive discipline and strategies for implementation
  - ✓ Describe the supervisor's role in termination

- **Critical Thinking – proposed addition - awaiting draft curriculum from developer**

- **Collaborations & Resources – proposed ½ Day training**
  - ✓ Describe the mandates and benefits of working with multi-disciplinary partners (Law Enforcement, Public Guardian/Conservator, IHSS, Legal Services, Financial Institutions, Senior Centers, Meal Programs, Medical Staff, etc.)
  - ✓ Identify ways to cultivate relationships and collaborations including inter-agency and community.
  - ✓ Describe the purpose of Memorandum of Understanding (MOU)
  - ✓ Practice developing a mock Memorandum of Understanding (MOU)
  - ✓ Identify methods for managing communication with management, partners, the community and media

- **Workplace Safety – proposed ½ day (based on Dan Elliot – Impact Safety webinar 3.21.12, L.A. supervisor training)**
  Ideas for Learning Objectives:
  - ✓ Universal safety best practices
  - ✓ IT/Technology safety best practices
  - ✓ Remember Supervisor safety concerns
  - ✓ Supervisor Role in worker safety
  - ✓ Collaboration/engagement/fostering a culture of safety

APS/Adult Service Manager Leadership Development Plan

> *Managing your problems can only make you good, whereas building your opportunities is the only way to become great* (Collins, 2001).

As was researched and discussed in the APS Leadership Development Framework – Research Report (Phase 1), there is a dearth of leadership training opportunities for professionals in Aging. Most learning and development occur on the job with multiple competing tasks and priorities. Additionally, for APS and/or Adult Service Managers in California, they are often tasked with administering multiple county programs (e.g. In-Home Support Services) which typically demand time and attention. This results in scarce time or consideration to APS beyond crisis resolution which profoundly effects program administration and outcomes.[iv]

Fortunately, the California Department of Social Services (CDSS), Academy for Professional Excellence, National Adult Protectives Services Association (NAPSA), Bay Area Social Services Consortium (BASSC), and the California Social Work Education Center (CalSWEC) were recently awarded a three-year grant from the Administration for Community Living (ACL) to develop an APS Leaders Institute with two major goals:

> 1). Increase the capacity of Adult Services and APS administrators to coordinate, plan, and implement APS system improvements. 2). Enhance the capacity of APS programs to meet the complex needs of vulnerable adults by increasing the number of MSW trained social workers working in APS (California Department of Social Services, 2018).

The following APS and/or Adult Services Manager Leadership Development Plan is largely based on the key objectives, anticipated outcomes and key deliverables from the APS Leaders Institute related to Goal 1 above. The training plan includes topics, structure, sequencing, modalities, use of emerging technologies, etc.

Key Deliverables

The APS Leaders Institute key training deliverables include:

- Adult Service Administrators – 2-4hr instructor-led training added to regular monthly meetings 1-2 times per year. The Administrators will join the APS Managers at trainings on the most salient topics they need to be aware of.
- APS Managers – Half-day instructor-led trainings will be added to regular APS Manager quarterly meetings. 3 times per year, 2-3hr Regional Team Planning/Discussion Sessions via remote conferencing.

Modalities

The goal for the APS Leaders Institute is to leverage established infrastructure to offer instructor-led training (ILT) and online modalities such as webinar and video conference calls (e.g. Zoom) to maximize participation and meet objectives and outcomes. Other modalities such as eLearning, podcasts and apps may also be utilized as needed for micro-learning or learning bursts and transfer of learning.

Topics

Adult Protective Services Leaders Institute Initial Survey - In January 2019, the California Department of Social Services (CDSS) Adult Protective Services (APS) Program Liaison administered a brief survey to county upper management regarding top training topics and "big picture" outcomes the forthcoming APS Leaders Institute should prioritize. Preliminary data from 54 respondents was shared for research and planning purposes.

The three most important training topics for the APS Leaders Institute to address according to survey respondents (n=54) includes: How APS organizational structure drives processes; Using data for program improvement; and Fiscal-understanding of funding streams. *See Table 1 below.*

From the same survey, the three most important "Big Picture" outcomes include (n=52): Developing case management services for high-need APS clients; Decrease abuse and self-neglect reoccurrences; and Develop a state level quality assurance standard. *See Table 2 below*.

In a subsequent meeting in February 2019 to discuss the survey data, the CWDA Protective Services Operations Committee (PSOC) endorsed the ranking of the training topics and endorsed the "Big Picture" outcome be focused on case management services for high-need APS clients. Subsequent discussions around liability with on-going case management and APS client right to self-determination will need to be addressed.

Table 1

Priority	Topic	Mean
1	How APS organizational structure drives processes (Skill- Applying program design principles to improve processes and outcomes)	3.54
2	Using data for program improvement (Skill- Analyzing data to drive program design)*	3.59
3	Fiscal-understanding of funding streams (Skill- Leveraging funding streams to increase program capacity)	4.87
4	Measuring Outcomes (Skill- analyzing factors related to outcomes and outcomes to understand program performance)	5.04

5	Standardizing data across counties (Skill- Understanding data and the politics behind data collection)	5.31
6	Telling our story- Public awareness to promote community support (Skill-Presenting to the public)*	5.33
7	Understanding the legislative process (Skill- Political acumen)	5.44
8	Collaborating and networking (Skill- developing effective community partnerships)	6.80
9	Rural APS needs (Skill-completing a gap analysis)	7.31
10	Best practices/Demonstration projects from other states (Skill- Evaluating the fit of a practice)	7.76

Source: (California Department of Social Services, 2019)

*Recommended to sequence these topics together.

Table 2

Priority	"Big Picture" Topic	Mean	Count
1	Decrease abuse and self-neglect reoccurrences	3.1	52
2	Develop case management services for high-need APS clients	3.1	52
3	Develop a state level Quality Assurance standard	4.87	52
4	Develop caseload and worker/supervisor ratios for the state	5	52
5	Develop effective partnerships with Public Guardian	5.65	52
6	Demonstrate the value of the APS program (cost saving, health outcomes)	5.73	52
7	Develop consensus for a statewide case-level (as opposed to the aggregate SOC 242 level) data collection system to inform state and federal program decisions	6.33	52
8	Increase prosecutions resulting from more effective working relationships with law enforcement	6.71	52
9	Promote California driven federal advocacy for federal funding for APS programs	6.88	52
10	Improve collaboration and networking with community partners	7.63	52

Source: (California Department of Social Services, 2019)

Suggested Sequencing and Potential Presenters

Based on the PSOC meeting in February 2019 and subsequent meetings of the APS Leaders Institute Advisory Team and program leads from CDSS, NAPSA and the Academy for Professional Excellence in March 2019, the following topic and sequence is recommended:

Training Priority 1 - How APS Organizational Structure Drives Process
Suggested to include aspects of: your personal leadership style, team building, and managing up
Content Expert(s): Karl Urban, MA, Senior Research Manager, WRMA - *How Structure Drives Process* (training delivered at 2018 NAPSA Conference)
Delivery Modality: ILT or Webinar
Delivery Timeframe:
Recommended Target Audience: APS Managers
How does this apply to the Big Picture outcome goal to develop case management services for high-need APS clients?

Training Priority 2 – Using Data for Program Improvement
Suggested to include aspects of: critical thinking
Content Expert(s): Karl Urban, MA, Senior Research Manager, WRMA, Inc. – *Using Data to Improve APS Services* (60min webinar delivered for APS-TARC Feb 2019)
Andy Capehart, Senior Business Analyst/Subject Matter Expert, WRMA, Inc.
Delivery Modality: ILT and/or Webinar
Delivery Timeframe:
Recommended Target Audience: APS Managers
How does this apply to the Big Picture outcome goal to develop case management services for high-need APS clients?

Training Priority 3 - Telling Our Story More Effectively Using Reframing and Data
Suggested to include aspects of: diversity, inclusion, cultural awareness. Add aspects of legislative process – e.g. proper messaging, giving compelling testimony and/or writing letters if all can realistically been covered in 4-hr block.
Content Expert(s): Reframing Aging – Krista Brown, Associate, Education Programs, American Society on Aging and Training and Curriculum Consultant
Reframing Elder Abuse – Julie Schoen, JD, Deputy Director, National Center on Elder Abuse (NCEA)
Speaker from County Using Reframing – El Dorado (Laura Walny Armstrong Soc. Services Program Manager), San Francisco (Shireen McSpaddin, ED DAAS), others?
Delivery Modality: ILT and/or Webinar
Delivery Timeframe:
Recommended Target Audience: *APS Managers and Adult Service Administrators*

How does this apply to the Big Picture outcome goal to develop case management services for high-need APS clients?

Training Priority 4 – Fiscal Understanding of Funding Streams (Note: depending on scheduling, this may be able to be combined with #7 – Understanding the Legislative Process as 4hr session or presented sequentially)
Suggested to include aspects of: understanding the legislative process as appropriate
Content Expert(s): Bill Benson, Principal, Health Benefits ABCs and National Policy Advisor, NAPSA
Carol Sewell, MA, (Former) Legislative Director, CA Commission on Aging and Chair, CA Elder Justice Coalition (CEJC)
CWDA and/or CSAC presenter
Delivery Modality: ILT and/or Webinar
Delivery Timeframe:
Recommended Target Audience: *APS Managers and Adult Service Administrators*
How does this apply to the Big Picture outcome goal to develop case management services for high-need APS clients?

Training Priority 5 – Measuring Outcomes
Content Expert(s): Pi-Ju (Marian) Liu, PhD, Assistant Professor, Purdue University -
http://www.pijumarianliu.com/
Akiles Ceron, MSW, Adult Protective Services Program Director, City & County of San Francisco – 2017 CWDA Conference Presentation: https://www.cwda.org/sites/main/files/file-attachments/day_2_b1_s5_sf_daas_cwda_presentation_final_10_04_17.pdf
Other presenter county with models of identifying issue, collecting and analyzing data, and use for service/program improvement.
Delivery Modality: ILT and/or Webinar
Delivery Timeframe:
Recommended Target Audience: *APS Managers and Adult Service Administrators*
How does this apply to the Big Picture outcome goal to develop case management services for high-need APS clients?

Training Priority 6 – Standardizing Data Across Counties
Suggested to include aspects of: NAMRS component for national data collection; previous and current statewide efforts from PSOC
Content Expert(s): Lori Delagrammatikas, MSW, Executive Director, NAPSA and Former APS Liaison, CA Department of Social Services
Andy Capehart, Senior Business Analyst/Subject Matter Expert, WRMA, Inc. or other NAMRS rep.
Delivery Modality: ILT and/or Webinar
Delivery Timeframe:
Recommended Target Audience: APS Managers

How does this apply to the Big Picture outcome goal to develop case management services for high-need APS clients?

Training Priority 7 – Understanding the Legislative Process
Suggested to include aspects of: proper messaging, giving compelling testimony and/or writing letters, advocacy; the concept of intergenerational nature of abuse/abuse across the lifespan
Content Expert(s): Bill Benson, Principal, Health Benefits ABCs and National Policy Advisor, NAPSA
Carol Sewell, MA, (Former) Legislative Director, CA Commission on Aging and Chair, CA Elder Justice Coalition (CEJC)
CWDA – Diana Boyer
CSAC – speaker from Institute for Excellence in County Government or CSAC Legislative Staff (https://www.counties.org/legislative-process)
Delivery Modality: ILT and/or Webinar
Delivery Timeframe:
Recommended Target Audience: APS Managers
How does this apply to the Big Picture outcome goal to develop case management services for high-need APS clients?

Training Priority 8 – Collaborating and Networking
Suggested to include aspects of: communication and relationship building; power of MOUs; concept of intergenerational nature of abuse/abuse across the lifespan
Content Expert(s):
Delivery Modality: ILT and/or Webinar
Delivery Timeframe:
Recommended Target Audience: APS Managers
How does this apply to the Big Picture outcome goal to develop case management services for high-need APS clients?

Combine Training Priority 9/10 – Best Practices/Demonstration Projects from Other States With Focus on Rural APS Needs
Suggested to include aspects of: senior poverty, opioids, homelessness include examples of successful case management programs for high-need APS clients
Content Expert(s): NAPSA Regional Reps – TBD
Opioids & Elder Abuse - Bob Blancato or Brian Lindberg or Pamela Teaster - https://eldermistreatment.usc.edu/opioids-and-elder-abuse-a-disquieting-connection/
Senior Poverty – Justice in Aging
Older Adult Homelessness – Margot Kushel, MD is a Professor of Medicine in the Division of General Internal Medicine at Zuckerberg San Francisco General Hospital and Trauma Center and the Director of the UCSF Center for Vulnerable Populations - https://profiles.ucsf.edu/margot.kushel
Delivery Modality: ILT and/or Webinar

Delivery Timeframe:

Recommended Target Audience: *APS Managers and Adult Service Administrators*

How does this apply to the Big Picture outcome goal to develop case management services for high-need APS clients?

Other Critical Leadership Development Competencies

Additional critical leadership development training competencies identified in the APS Leadership Development Framework Research Report (Phase 1) can be interwoven into the APS Leaders Institute key deliverables if not present (see "Suggested to include aspects of:" above) and/or be considered for leadership development outside the APS Leaders Institute. These topics often are the foundational knowledge, skills and experiences that create effective leaders, staff, and organizations.

As per the Phase 1 report, content and competencies from nine state and national leadership development programs for aging in beyond included:

Common program competencies include:

- Individual and team leadership including some sort of self-assessment or self-exploration

- Collaboration, relationship-building and networking

- Visioning, critical thinking, problem-solving

- Creating and handling systems or policy change

- Managerial and/or financial skills

- Diversity, inclusion, cultural awareness/competence

- Communication – individual, team, presentation skills and conflict resolution

Next Steps and Planning for the Future

The best way to predict the future is to create it.
- Abraham Lincoln

The field of Adult Protectives Services (APS) is at an exciting and critical juncture. In the past decade, the world outside of the field of protective services is catching up to the fact that this part of the social safety net plays a critical role in the overall health and safety of older adults and persons with disabilities and our overall communities.

The past decade has seen the roll-out of national standardized training and certification for APS workers; roll-out of a federal data collection and reporting system; creation of National Voluntary Consensus Guidelines for APS Programs; the increase in influence and exposure of the Elder Justice Coordinating Council; and the growth of elder justice initiatives such as California Elder Justice Coalition and others. This is to name just a few examples. Yet, despite the gains, training and support for all levels of APS staff, including supervisors and managers, is lacking in many states and counties.

Specifically, California has an opportunity to keep and grow its commitment to APS and Adult Services programs with the forthcoming ACL-funded APS Leaders Institute and by allocating adequate statewide funding for next fiscal year and beyond for training of all levels of staff including supervisors. Thankfully, there is precedent for this.

In 2016, the Legislature and Governor approved a one-time, $3 million general fund investment into the APS Training system (with $3 million federal match it totaled $6 million) to support the development of a training infrastructure for delivering training to APS social workers and some local PA/PG/PC. Over the last three years, the trainings reached hundreds of APS social workers statewide through the Regional Training Academies, and many PA/PG/PC through ten regional trainings and at their Annual Conference. These funds are set to expire on June 30th, reverting APS Training funding to a $88,000 per year (plus $88,000 federal matching for a total of $176,000 per year for the entire state) and eliminating all regional trainings for PA/PG/PCs (Action Alert: Support APS and Public Guardian Training , 2019).

Currently, a coalition including California Commission on Aging, California Elder Justice Coalition, the County Welfare Directors Association, and the California State Association of Public Administrators, Guardians and Conservators have submitted a joint proposal to the legislature to increase state funding for statewide APS and PA/PG/PC training to $5.75million ($10.25 million with federal matching funds) over three years. The intent of this proposal is to ensure a statewide, consistent APS training program infrastructure to provide core training to all new APS staff, supervisor training, and advance training driven by new policy and emerging trends (Action Alert: Support APS and Public Guardian Training , 2019). Those involved in the APS and Adult Service training and advocacy are submitting letters of support as the legislation winds its way through committee.

Conclusion

This concludes the second phase of the Adult Protective Services Leadership Development Framework Project. The APS Leadership Development Plan is comprised of research, best practice models/programs, survey data, and national recommendations to develop leadership development plans for APS Supervisors and APS/Adult Service Managers. These plans inform and support the development of the forthcoming APS Leaders Institute and future leadership training initiatives for APS Supervisors.

References

[i] Consideration should be given to the important role of the supervisor in reviewing cases during critical supervisory junctures, and the differences in the amount of time needed to supervise complex cases. Further, programs should consider the challenge to supervisors of simultaneously supervising workers from different programs (e.g., APS, Child Protective Services, In Home Support Services, aging services). Among the roles and functions of APS supervisors, programs should articulate the role of supervisor as trainer, especially for new workers; as mentor and advisor to workers; in community engagement; and in participation on multi- disciplinary teams. Finally, it is recommended that there be a limit on the number of workers supervised by each supervisor (Administration for Community Living, 2016).

[ii] Strategic Goal 5 states, "(NAPSA) supports the development of increased skills, knowledge, and abilities of APS professionals throughout the country by developing and providing high quality training materials and training opportunities" (NAPSA, 2013).

[iii] Guideline: It is recommended that APS supervisors be qualified by training and experience to deliver Adult Protective Services. It is recommended that all APS supervisors receive initial and ongoing training specific to their job responsibilities and the complex needs of APS clients and managing APS workers. It is recommended that new supervisors be trained on basic supervisory skills within the first year of assuming supervisory responsibilities, including, but not limited to: a) Mentoring b) Phases of APS Supervision c) The Supervisor as Trainer d) Managing the Investigative Process e) Human Resources/Legal Issues for Supervisors

In addition, it is recommended that supervisors refresh their skills with ongoing annual training on higher level topics, such as training processes, worker development, and effective adult learning (Administration for Community Living, 2016).

[iv] Administrators at all levels are generally unaware of federal changes that can and should impact funding, policies, and practices.
There is a lack of statewide coordination and sharing of innovative practices and lessons-learned among counties. There is a lack of knowledge regarding how states outside California with similar needs are handling similar problems and issues.
Although county-based APS managers discuss the needs of the program at statewide County Welfare Directors Association (CWDA) meetings, the information from those meetings is not consistently, or uniformly, shared with Adult Services Managers, and Agency Directors. Two-way communication, influence, and consideration of APS needs at the upper management levels within counties is gravely lacking.
Strategies known to improve the experiences and outcomes for those at risk of or experiencing abuse are not implemented due to lack of attention, lack of knowledge, or lack of political will within a county system (Grants to Enhance State APS, 2018).

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