

# Voluntary Service Planning eLearning Transfer of Learning (TOL)

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## Voluntary Service Planning eLearning Transfer of Learning

### Objective:

This Transfer of Learning (TOL) provides additional support to APS professionals who have completed the [Adult Protective Services Workforce Innovations](#) (APSWI) *Voluntary Service Planning eLearning* or the [National Adult Protective Services Training Center](#) (NATC) *Voluntary Case Planning eLearning*. It is designed to transfer concepts from both of the learnings and apply them into APS practice.

Participants will have the opportunity to further practice the following skills:

- [Identifying factors](#) that influence the APS Service Plan
- [Identifying the stage of receptivity and identify appropriate interventions](#) to offer the client
- [Compile a list of available community resources](#)
- [Review essential elements of a service plan and practice writing a service plan](#) that is collaborative, solution-oriented, realistic, and centers the client's needs and cultures.

### How to Use:

- Facilitators, APS supervisors, or leads can use this TOL as a virtual or in-person Instructor-Led Training (ILT) or during individual supervision. Activities can also be assigned to staff to complete on their own. Follow up discussions during one-on-one or group meetings supports the transfer of learning and shared expectations.
- There are four activities with estimated timeframes ranging from 15 minutes to 45 minutes. The total estimated timeframe to participate in all four learning activities is approximately two (2) hours.
- There is a Facilitator Support section, located after each activity, which provides information and guidance to help support the facilitator.

### Content Warning:

We recognize that APS work is both challenging and rewarding and APS professionals are whole human beings who have their own experiences before and during APS work. Scenarios, questions and discussions may activate feelings based on personal or professional experiences, including secondary and/or vicarious trauma and we encourage everyone to do what they need to do in order to safely engage in this transfer of learning.

## Identifying Relevant Factors

**Time allotted: 15 minutes**

**Method: Group, Pairs, or Individual Work**

The following activity can be used with the case vignette provided, or with an APS professional's own case. You may want to review the five general factors (Client Wishes, Perpetrator Issues, Urgency of the Situation, Ethical Considerations, Cultural Considerations) that should be considered when determining intervention needs.

### Case Vignette:

Maria Gutierrez (she/her) is an 82-year-old widow who has been living in an affordable housing community for 40 years. She raised three children there with her partner who passed away 15 years ago. Since his passing, she has had to rely on Supplemental Security Income (SSI) and a food assistant program called CalFresh. She has never worked outside the home and has a 2nd grade education from a Puerto Rican public school. Her children are all grown and are raising their own children and grandchildren. Her youngest son Felix, age 45, has historically stayed with her intermittently, but lately Felix has been living with her consistently for the last 6 months. Maria's landlord suspects that Felix experiences challenges with mental health disorder as he has seen Felix talking to himself while walking around the complex. He has not held a steady job and relies on Maria for a place to stay. In the last few weeks, Felix was in need of emergency dental services and Maria provided him with the money to cover the required procedure, as it was not covered through Felix's medical insurance. Maria is behind in her rent and has received an electricity shut-off notice. Maria states that it was important to her that Felix had his dental procedure completed, so she gave him the money. Maria has diabetes, is dependent on insulin, and has had 2 toes amputated. It is unclear whether she is regularly seeing her physician or taking her medications as prescribed. An APS referral was made by Maria's landlord with allegations of Self-Neglect due to being at risk of losing her apartment and receiving the electricity shut-off notice. Additionally, the Reporting Party (RP)/landlord alleges Maria's son Felix is financially abusing Maria because he does not contribute to the rent or household expenses. Maria reported to the APS professional that she refuses to "throw her son out on the street" and she knows everything will work out.

Identify the relevant factors, using the information in the case vignette (or your own case), complete the chart below.

<p><b>Client Wishes</b></p> <ul style="list-style-type: none"> <li>-Decision-making ability</li> <li>-What the client states their wishes are</li> <li>-Risk factors</li> <li>-Resources</li> </ul>	
<p><b>Perpetrator Issues (if applicable)</b></p> <ul style="list-style-type: none"> <li>-Relationship</li> <li>-Dependency</li> <li>-Motives</li> <li>-Threat level</li> </ul>	
<p><b>Urgency of the situation</b></p>	
<p><b>Ethical Considerations</b></p>	
<p><b>Cultural Considerations</b></p>	

Respond to the questions below to help you think about the next steps and initiate a discussion.

1. What additional questions would help you gain a better understanding of the concerns that need to be addressed in this case?
2. What steps would you take to determine how to collaborate with your client to start a service plan?

## **Facilitator Support for Identifying Relevant Factors Activity**

### **Client Wishes**

- Maria stated that she refuses to throw her son out
- Maria receives SSI and CalFresh food assistance
- Felix's health is important to Maria
- Maria appears to be able to understand her current situation and make her own decisions

### **Perpetrator Issues**

- Felix is dependent on Maria for housing and his emergency dental procedure
- There is no evidence of Felix being physically or verbally aggressive toward Maria

### **Urgency**

- There is some urgency to Maria's situation as she has already received an electricity shutoff notice
- Maria's housing may be in jeopardy
- Maria's health may also be in jeopardy as it is unclear if she is taking her medications as prescribed

### **Ethical Considerations**

- Maria has lived in the same community for 40 years and may not want to move away
- If Maria refuses services, is it ethical for APS to close the case?

### **Cultural Considerations**

- Maria's preferred language may not be English, so it is important to offer services in her preferred language
- Does Maria wish to involve other family members?
- It may be helpful for the APS professional to ask Maria what is most important to her

1. What additional questions would help you gain a better understanding of the concerns that need to be addressed in this case?

*Possible answers: How far behind is Maria in her rent? Is it feasible for her to remain in her current housing? When was the last time Maria saw her primary care doctor? Are there any obstacles that make it difficult for Maria to receive medical care or obtain medication that is prescribed to her?*

2. What steps would you take to determine how to collaborate with your client to start a service plan?

*Possible answers: Ask what language Maria prefers to communicate in and obtain an interpreter if needed. Ask Maria about her relationship with other family members. Build rapport with Maria by asking what is important to her and how does she see her situation.*

## Identifying Receptivity Stage and Choosing Appropriate Interventions

**Time allotted: 15-20 minutes**

**Method: Individual Work and Group Share**

Below are four short scenarios in different stages of receptivity: Reluctance, Recognition, and Rebuilding. Identify the stage that corresponds to each scenario and think about the details that helped you identify the correct stage. Then identify some supportive interventions you as an APS professional can suggest that may assist and empower the client in each scenario. If suggesting other local agencies, provide the names of the agency and phone numbers or websites in your area. As a group, compare answers for each scenario's stage and interventions.

1. A 76-year-old man was referred to APS following an incident where he called law enforcement to his home and reported that his 44-year-old daughter was under the influence of alcohol and pushed him, causing significant bruising. He states this has been going on far too long and asserted, "I can't live like this anymore". He tells the APS professional that he wants his daughter to move out immediately and is interested in a restraining order.

**Stage and why:**

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**Interventions:**

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2. A 64-year-old woman was referred to APS after her primary care physician noticed finger-shaped bruises on both of her upper arms. This is not the first time she was referred to APS, however, in the previous case she stated to the APS professional "my husband can be a little rough with me, but it's not a big deal, I'm fine. I don't need protection", then asked the APS professional to leave. This time she declined services again, but stated she could use assistance with transportation because her husband doesn't always like to drive her to appointments.

**Stage and why:**

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**Interventions:**

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3. A 29-year-old woman living with Down syndrome, Epilepsy, and Major Depressive Disorder was referred to APS by the administrator of the day program she attends. The administrator reports that the client has a boyfriend who often waits for her just outside of the program's building, and was seen grabbing her roughly by the hair. The client tells the APS professional she knows he is "not good for me", but says she often gets lonely and he is the only one who has stuck around.

**Stage and why:**

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**Interventions:**

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4. An 80-year-old man was referred to APS with allegations of financial abuse after his bank noticed four transactions of \$1,000 each sent via wire transfer to a female name that has never been on his transactions. The next time client went into the bank, the teller who generally works with him and is familiar with him asked what the money was for. The client tells the teller that he sent his girlfriend money to help her pay rent then to buy a plane ticket to visit him. When the APS professional asks about his girlfriend, the client becomes visibly upset and says that he thought the APS professional was going to help him find a housekeeper, not “grill” him about his love life.

**Stage and why:**

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**Interventions:**

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## **Facilitator Support for Identifying Receptivity Stage and Choosing Appropriate Interventions Activity**

### 1. **Stage:** Rebuilding

**Interventions:** Assistance with a restraining order, refer to a domestic violence victim's advocate, safety planning, referral to counseling services

Suggested Discussion Question:

- How can the APS professional support the client in this situation?
  - *Possible answers include clarifying the client's goal(s), providing client with options available to help him reach those goals, such as a restraining order, changing his locks, etc. If the client needs additional assistance accessing these resources, the APS professional can set up additional services such as accompaniment to court to request a restraining order, transportation, etc.*

### 2. **Stage:** Reluctance

**Interventions:** Transportation services

Suggested Discussion Question:

- What might have happened if the APS professional told the client that she was in an abusive relationship and offered her assistance with a restraining order against her spouse?
  - *Possible answers include refusing any assistance at all, including transportation resources, client may become more distrustful of APS.*

### 3. **Stage:** Recognition

**Interventions:** Safety planning, psychoeducation on the cycle of violence, DV shelters, healthy socialization opportunities, information on how to obtain a restraining order

Suggested Discussion Question:

- How might the APS professional further build trust with this client?
  - *Possible answers include validating client's reported feelings of loneliness and accepting that her boyfriend does provide companionship, identifying her insight that "he's not good for me" is a strength.*

4. **Stage:** Reluctance

**Interventions:** Assistance with finding a housekeeper/caregiver, basic information on common scams, including romance scams

Suggested Discussion Question:

- How can the APS professional address the concerns about the client's finances while maintaining good rapport with the client?
  - *Possible answers include validating client's feelings and connection with the person he is sending money to. Providing general information about different types of scams. Expressing concern over client not being able to cover his own expenses.*

## Scavenger Hunt

**Time allotted: 45 minutes**

**Method: *Group, Pairs, or Individual Work***

When collaboratively developing a service plan with your client, it is beneficial for you to be familiar with community resources and services. Understanding the available resources can empower you and your client while navigating the service planning process. Complete the template below to start building your community resource list. We encourage you to utilize this template as your reference sheet adding as you discover new services. It may be useful to create a portable binder or folder for your home visits, allowing you to easily reference it when necessary.

<b>Service</b>	<b>Agency</b>	<b>Service Provided</b>	<b>Eligibility Requirements</b>	<b>Cost</b>	<b>Referral Process</b>
Major Home Cleaning					
Home Health Care					
Emergency Shelter					
Respite Care					
Home Delivered Meals					
Pet food/care					
Podiatrist (home visit)					
Emergency Food					
Medical Transportation					
Friendly visitor					
Utility Bill Assistance					
Substance Use Treatment					
Caregiver Support					
Financial Management					

## Service Planning Essentials

**Time allotted: 45 minutes**

**Method: Individual Work and Group Share**

Review the essential elements of a thorough service plan below. Then create a service plan for Maria Gutierrez from the case vignette from the first activity, [Identifying Relevant Factors](#). Make sure to include all essential elements in the plan.

- Collaborative
- Solution-oriented
- Appropriate to client's needs
- Consistent with client's cultures and lifestyle
- Realistic, time-limited, and concrete
- Dynamic and negotiable
- Inclusive of follow-up

Consider the following when creating a service plan for Maria from the case vignette in Activity #1:

1. What is important to Maria?
2. How Does Maria view the situation or the risk?
3. What are the high-risk issues?
4. What services or resources might mitigate the risk to Maria?
5. How urgent is Maria's situation?

## **Facilitator Support for Service Planning Essentials Activity**

These are the essential elements of a thorough service plan and their descriptions. It may be helpful to review them with the learner to help them build a comprehensive service plan.

### Collaborative

A good service plan should be developed with the client. If it is imposed by the APS professional and the client does not see the value and importance or participate in the process, the plan is likely to fail, and the client will be left at risk for harm.

### Solution-oriented

The plan should be focused on solution-oriented, with both the problem/issue and the solution being defined and shared by the APS professional and client. Remember that the problem you identify may not be the same problem the client identifies and is willing to work on.

### Appropriate to client's needs

The plan should be based on an accurate assessment of the client's functional level and dependency needs.

### Consistent with cultures and lifestyle

It should respect the client's beliefs, values, and practices, while actively supporting their way of life and aligning with their cultural standards.

### Realistic, time-limited, and concrete

The service plan must be feasible and achievable. Setting expectations too high may disappoint the client and may result in a negative experience that the client will not want to repeat. It can also be frustrating for the APS professional. The service plan may need to happen in small increments, with trial periods and check-ups. Focus on small successes.

### Dynamic and renegotiable

In APS work, we never know what new information will become available, what friend or relative will appear/disappear, what medical or psychiatric condition will change. Therefore, the plan, and the APS professional, must be flexible and willing to renegotiate depending on the circumstances.

### Inclusive of follow-up

It is important to follow up with the client as well as with the service providers, family members, and others who are a part of the plan.

### Possible answers:

1. What is important to Maria? *She wants to make sure her son Felix is healthy and has a place to live.*
2. What are the high-risk issues? *Maria may be at risk of having her electricity shut off and losing her housing.*
3. What services or resources might mitigate the risk to Maria? *Resources to help Maria catch up on her rent and utilities would ensure she is able to remain in her home. Alternate housing may be needed if Maria is unable to catch up on her rent and utility bills. Maria's health may also be in jeopardy; however, we do not have enough information to fully assess this issue.*
4. How urgent is Maria's situation? *We do not know how much Maria owes in rent; however, her electricity is likely to be disconnected in the near future.*

### Example of a service plan for Maria Gutierrez:

Client is at risk of homelessness due to being behind on her rent, as well as having her electricity shut off. Maria has given the APS professional permission to identify different housing options.

- APS professional can ask Maria if she has any preference for alternate housing.
- APS professional can offer Maria a referral to low-income housing for older adults within her neighborhood, as well as explore the possibility of moving in temporarily with her other children.
- APS professional will identify resources to help Maria pay her back rent and catch up on paying her utilities.

Maria provided her son with money from her limited income instead of paying her rent, further placing client at risk of homelessness. Maria may like services to benefit her son as well.

- APS professional can provide client's son with transportation resources, as well as low-income housing options for himself.

Client is at risk of medical complications due to diabetes. It is not clear whether client is receiving appropriate medical treatment or if she is taking her medications as prescribed.

- APS professional can provide client with transportation resources to get to her medical appointments and will follow up within one week to ensure client was able to obtain transportation to medical appointments.
- APS professional can advocate for home health services to ensure that client is using her insulin appropriately.
- APS professional will refer client to IHSS for assistance with household chores and medication reminders.
- APS professional will follow up with client to ensure the IHSS process was started within one week of the home visit with client.

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OUR WHY:

REVOLUTIONIZE  
THE WAY PEOPLE  
WORK TO ENSURE  
THE WORLD IS A  
HEALTHIER PLACE.



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