
BRIEFING MEMORANDUM

Date: April 13, 2016
To: Judith Kozlowski, JD
From: Stacy Rodgers, Chief of Staff, Social Security Administration
Subject: Executive Summary, Elder Justice Coordinating Council Meeting – Key Points for Training Panel

Background

The following outlines my remarks for the April 27 meeting where I will serve on the Training panel. I will highlight our training effort that was designed to heighten awareness of the incidence of abuse, neglect, and financial exploitation for our target audiences, representative payee program participants, and other individuals who serve the senior population. As requested, I am submitting enhanced bullet points that outline my planned 3-5 minute remarks.

Executive Summary of Remarks

- Results of a recent study reported that for every 10,000 people who sign up for Social Security each day, 1,000 will become victims of financial exploitation.
 - Even more alarming --- only 1 in 44 cases is reported
- As an extension of the work of the Elder Justice Coordinating Council, over the past 2 years we, in collaboration with an array of partners, have been working on a collaborative interdisciplinary pilot in Anne Arundel County, Maryland and Chicago, Illinois. Our work included the development of a series of training modules.
- To develop the training, we have partnered with:
 - the Administration on Aging within the Administration for Community Living,
 - the Consumer Protection Financial Protection Bureau,
 - Senior Corps programs which are funded by the Corporation for National and Community Service,
 - Anne Arundel County Department of Social Services,
 - the City of Chicago Department of Family & Support Services,
 - Wells Fargo and their Financial Education Program Hands On Banking,
 - the Corporation for National and Community Service (CNCS),

- the National Adult Protective Services Association, and
- Rush University.
- We focused on enhancing the relationship between SSA and community-based service providers by increasing our efforts to heighten awareness and prevention of abuse, neglect, and exploitation of seniors and vulnerable adults.
- To help our seniors and vulnerable adults live as independently as possible in the setting of their choice, this pilot was designed to recruit, train, and equip representative payees with the tools to effectively serve our beneficiaries and better safeguard them against potential abuse and financial exploitation.
- As part of the pilot we developed an interdisciplinary training series designed to heighten representative payee awareness about the signs of elder abuse and exploitation, how to recognize the signs of changes in adult decisional capacity, and effective strategies for interacting with the banking community.
- Our goal is to ensure that our representative payees have key information and access to resources that will assist them in serving our customers.
- To that end, this interdisciplinary training includes the following four modules:
 - SSA Representative Payee Technical Training
 - Elder Abuse & Financial Exploitation
 - Helpful Information for Interfacing with the Banking Community
 - Changes in Decisional Capacity
- In the developing the modules, we realized that there was great potential for us to partner more broadly, for instance, providing the modules to volunteer programs to reach thousands of individuals across the country who work with seniors and vulnerable adults. The modules can be included as part of their continuing education efforts.
- Three of the modules have been identified as useful for the general population. In cooperation with the CNCS, we will work with approximately 700 senior-focused grantee programs to distribute the modules in conjunction with World Elder Abuse Awareness Day.
- We will also share this information with our employees. This effort is the first time that we have worked to heighten their awareness of the warning signs of abuse, neglect, and financial exploitation.
- In addition, providing the training in an online format will provide for a convenient, self-paced review for continuing education purposes.

- We hope that this training will heighten awareness and provide further insight and understanding about the growing incidence of elder abuse and financial exploitation, assist with broadening community awareness, educate members of the public who assist vulnerable adults and seniors, and provide key resources to those seeking assistance to address these issues.