

January 2025 APS TARC Podcast Transcript

Lifespan's E-MDT Technical Assistance Resource Center

Introduction

Andrew Capehart: Welcome to the Adult Protective Services Technical Assistance Resource Center podcast. We come to you with the goal of sharing promising practices and innovations from the Adult Protective Services field, and to highlight what is achievable with new ideas and partnerships to help you envision what may be replicated in your program. Let's join our host, Jennifer Spoeri, APS TARC subject matter expert, and guests in conversation.

Discussion

Jennifer Spoeri: All right, so welcome to the APS TARC Podcast. Today, we're going to discuss New York State's Enhanced Multi-Disciplinary Team, or E-MDT, program. We will speak with Lindsay Calamia, Lifespan's E-MDT program manager, and Allison Granata, Lifespan's director for E-MDT initiatives. Keep in mind that the APS Final Rule notes that state entities shall establish policies and procedures consistent with state law to ensure coordination and to detect, prevent, address, and remedy adult maltreatment and self-neglect with other appropriate entities. We'll go into the self-neglect part later on here, but this program certainly fits that bill in most areas. Lindsay, Allison, thank you for being here today to discuss the great work coming out of New York State and with the Enhanced Multi-Disciplinary Team initiative. Before we dive into the program, can each of you give us a little background on your journey to your current work on this project? Lindsay, I'll let you go first.

Lindsay Calamia: Well, thank you, Jennifer, for having us. So I'm Lindsay Calamia, and as you mentioned, the E-MDT program manager at Lifespan of Greater Rochester, and my journey here, my goodness. So I really got my start in the field of elder abuse or elder justice working as an APS case manager.

Jennifer Spoeri: You got street cred.

Lindsay Calamia: I do, yes. So I worked for an agency called Springwell in Boston, Massachusetts, I have to give a little shout out there, for about five years, and so, yeah, that really introduced me to this field. And from there, you know, I was missing my hometown, missing Rochester, New York, after being away for a couple of years. So I came back to Rochester and started working for the Upstate Elder Abuse Center at Lifespan, where I'm still working. So I've been here since 2012, and so I started as an elder abuse prevention case worker, really doing similar work to APS, but not quite at the APS level, so investigating and providing intervention for cases of suspect elder abuse and mistreatment in the 10 Finger Lakes counties in upstate New York. And then by 2017, Allison called me over to the E-MDT program. And since then, I've really had, you know, the honor, the privilege to focus on developing and building our technical assistance program for E-MDT programs in New York state, at a national level, and then pilot programs along the way. So that's ...

Jennifer Spoeri: Great. Wow. And you got to keep the cold weather when you moved from Boston to Rochester, right?

Lindsay Calamia: Super similar weather, absolutely.

Jennifer Spoeri: So Allison, how about you and your journey to the program?

Allison Granata: So I don't have the street cred that Lindsay has, unfortunately, but I've actually spent my entire career here at Lifespan. I started by interning, and I've worked as a care manager in our elder source program. And then I was doing PERLS, the program to encourage active and rewarding lives in home like depression and anxiety coaching. And then I was able to transition to the E-MDT program in 2013, which is when I kind of originally started to transition to the elder justice field. So since then, I've been working at Lifespan for about 16 or 17 years now, and I've been working exclusively on elder abuse cases for about 12-ish now, I think.

Jennifer Spoeri: Oh, okay, so you've got time served, see?

Allison Granata: Yes.

Jennifer Spoeri: So we'll count it.

Allison Granata: Perfect. I like that.

Jennifer Spoeri: Great. APS is such a multi-disciplinary field that, you know, it's good to have other disciplines injected into our work. So let's get down to business here. So how did the New York state E-MDT initiative come to fruition, and how is it funded? That's always the question, right?

Allison Granata: Yeah, so MDTs obviously are not a new concept. I think, you know, we, as we were starting our teams, modeled ours closely after the local child abuse team here, and so obviously, the MDT aspect is not new. However, MDTs in the field of elder abuse were newer still, I would say. Lifespan convened an elder abuse summit in 2004 and 2010 and to develop recommendations to address elder abuse from, it was a statewide summit so it brought professionals from multiple disciplines across the state. And actually one of the recommendations that came out of that was to start to create multi-disciplinary teams specifically addressing elder abuse. And then in 2012 we received pilot funding from the Administration for Community Living, and so we started with, this was funding that was granted to the New York State Office for the Aging, and we partnered between the NYSOFA, the New York State Office for the Aging, Lifespan, and at the time, the New York City Elder Abuse Center, now the Center for Elder Abuse Solutions. And so we partnered with those three agencies, and we highlighted the E-MDTs in seven counties in the Finger Lakes region in New York state, and then one in Manhattan. From there we were able to get additional funding. In 2016 the New York State Legislature backed us further and allowed us to start to expand and add additional hubs and counties. And then from there, in 2017 the New York State Office for the Aging partnered with the Office of Victim Services, and we have some Victims of Crime Act VOCA dollars that support our funding, as well as state funding.

Jennifer Spoeri: The patchwork quilt of funding. But that's great to hear that the legislators supported it. Huge.

Lindsey Calamia: I also have to add, I just wanted to acknowledge that from 2017 to 2023 the New York City Aging, which is formally the New York City Department for the Aging, but New York City Aging-funded Center for Elder Abuse Solutions, or CEASE, our partner in the initiative, they also provided them some funding to coordinate E-MDTs in the boroughs of New York City. So they were also part of this journey in terms of where our, our backing came from.

Jennifer Spoeri: Gotcha, yeah, because, I mean, New York is a big state in itself, but then you add New York City in there, and it's ...

Allison Granata: Very much so.

Jennifer Spoeri: And that's interesting about the summit, because I remember you guys doing that summit, and now with virtual capabilities, it's like a lot of states, or, you know, regions could be doing these kind of summits to really get feedback on what, what would help, what, what kind of support do you need? So.

Allison Granata: We actually held an additional summit in 2021 or two. I've lost track now, I'll be honest, which was a virtual summit, another statewide summit, so.

Jennifer Spoeri: Yeah, due to the pandemic.

Allison Granata: But you know, it also helps get partners there, because, you know, travel's reduced and, you know, time.

Jennifer Spoeri: Yeah. So okay, how does this statewide program work then? Any key partners that have been just integral in your success?

Allison Granata: Yeah, so we have, kind of, there are different levels of partnership, I'll say. So from the initiative aspect, we have our partners with the New York State Office for the Aging and the New York State Office of Victim Services, which are funders and true partners with the work that we're doing. They're especially nice so far, extremely involved and supportive of the work. And then, of course, the Center for Elder Abuse Solutions, which is another partner in the, the statewide aspect. And from there we, we also fund 12 agencies that do the work of the E-MDTs. So Lifespan is the fiduciary for the funding. And then we pass down funding to 12 additional agencies across the state to implement the E-MDT project in their region. And so those are all fantastic partners that we work very closely with. And then from there, Lindsay, do you want to kind of touch base about some of the other partners?

Lindsay Calamia: Oh my gosh, yeah, I feel like I'm at like an award ceremony.

Jennifer Spoeri: I know, right?

Lindsay Calamia: So many people to thank along the way, right? There's so many. I mean, if you think about this, though, as a statewide initiative, the E-MDT concept is built on partnerships, right? Like we are looking at cross-systems collaboration, we're looking to improve our coordination of services from all disciplines so of course there are many different partners to thank along the way. But I would really give a nod to University of Rochester Medical Center, their geriatric mental health and memory care program is where our geriatric psychiatry partners come from.

Jennifer Spoeri: Huge.

Lindsay Calamia: Statewide. Yeah, geriatric psychiatry services, they have developed a capacity clinic to help address some of the gaps in services across New York state. I think through our partnerships along the way, that's one of the things that we've learned. Another would be our outstanding and amazing team of forensic accountants from the Bonadio Group, especially Karen Skews.

Jennifer Spoeri: Yes!

Lindsay Calamia: Formerly Karen Rubber, but you might have heard of Karen, who she was a really big part of starting this journey from the beginning, Allison, before I joined.

Allison Granata: She sure was, yes.

Lindsay Calamia: And then definitely, you know, the many different community legal service providers who contract with our county-based programs, or the agencies that Allison mentioned before to provide legal services in their community. We have state agency support from partners like Office of Children and Family Services who oversee our New York state APS programs.

Jennifer Spoeri: Go APS.

Lindsay Calamia: Yeah. I mean, there's so many, right? But of course, like Allison said, the work that is happening across the state through the 12 agencies who are funded, their partners in this work, those county-based E-MDT professionals who are really just so amazing and dedicated to this work, coming together to participate on teams, joining meetings every month, sometimes more than once a month, if there's, you know, many meetings that have to happen, referring cases, you know, really committed to the intervention of elder abuse and mistreatment and working as a team to collaborate and coordinate that work, so, so many people.

Jennifer Spoeri: That's amazing.

Lindsay Calamia: Allison, did I miss anyone?

Jennifer Spoeri: This is like, this is like the Oscars of E-MDT.

Lindsay Calamia: It feels like it!

Allison Granata: It really is. It could go on for quite a long time, especially so.

Jennifer Spoeri: Well the fact that you guys mentioned those three key components, the legal, the accounting, and the geriatric mental health professionals. That's a trifecta, if I've ever heard one.

Allison Granata: That's right.

Jennifer Spoeri: What were you going to say, Allison? I'm sorry.

Allison Granata: I, I was just gonna say that, you know, Lindsay referenced some of the key partners at the community, the county-based level, and such as the APS, such as the Office for the Aging and the law enforcement district attorney's office. And then from there, who knows who else is getting brought on board, depending on the county. And so, you know, it's kind of this magical creation that ends up happening, especially when we get some of those cases that we can feel a great success on.

Jennifer Spoeri: Yeah, and it supports everybody. You know, it's not just supporting APS. It does support APS, but it supports the DA's office. It supports the mental health professionals, everybody, because we can't do it alone. So.

Allison Granata: Exactly.

Jennifer Spoeri: So I have to ask, what does that elusive "E" mean in front of E-MDT, and how does the eligibility work? Like, how do you take cases?

Allison Granata: So the "E" is enhanced, so the Enhanced Multi-Disciplinary Team, and we've had that E since our original pilot funding. And so when we were originally funded, we were looking actually, specifically at financial exploitation cases, the addition of our funding and our partnership with the Office of Victim Services, we've expanded to go to all forms of elder abuse, except for self-neglect. Unfortunately, we're not able to directly address self-neglect cases unless they are, you know, co-occurring. And so that is the enhancement. And the enhancements are those specialty service providers that you referenced, that trifecta of the geriatric psychiatrist or mental health professionals, the forensic accounting, and the civil legal services. And so what we really look to do is those are three services that are often so instrumental in many of these cases, not necessarily every single one, but they are instrumental in many of them, and often the ones that are most difficult to fund or that the client or victim does not have the ability to fund separately. And so our goal as an initiative was to be able to provide access to those services where we could provide that additional support to be able to move a case forward in terms of trying to stop or put an end to the abuse.

Jennifer Spoeri: Gotcha. Anything to add to that, Lindsay, or did Allison capture the E?

Lindsay Calamia: She definitely captured. Yeah, that's our enhancement. Yeah.

Jennifer Spoeri: Yeah. I mean, it's just, this is really exciting stuff. So what are the goals? Because every good project starts out with goals, and, you know, they get tweaked along the way, but what are the goals of this initiative?

Allison Granata: So, Lindsay, I feel bad that I'm starting all the time, but ...

Lindsay Calamia: Please go.

Jennifer Spoeri: Chime in as needed.

Allison Granata: Yeah. So really, our overall goals are to decrease or eliminate abuse. The clients, if you will, of the E-MDT are the professionals that are bringing cases to the coordinator or to the team. And so really, what we're looking to do is to provide support to those professionals that are bringing those cases that can then kind of trickle down to the client. And so we're hoping to be able to reduce some of that red tape that we run into. We're looking for people to get creative and think outside of their discipline. That's one of the things that I absolutely love seeing when I'm working with some of my teams. I still coordinate three teams here in the Finger Lakes region, and I started the seven. I was actually the original coordinator for our pilot funding, and so being able to provide the support to the professionals that are stuck on these difficult cases is a huge goal of what we're looking to do. I mean, as an initiative, we're looking to provide funding across the state, and I'm really excited that we do have all of the hubs across the state funded, all of those agencies that we fund that are doing this work, and all 62 counties in New York state have access to an E-MDT coordinator, which is the point of access for the services that the E-MDT program initiative can offer. We're looking to ...

Jennifer Spoeri: That's, that's who you refer the case to and say, "Here, can you review this and let me know if you take it?"

Allison Granata: Yep, yep, exactly.

Jennifer Spoeri: They're the gatekeepers,

Allison Granata: Yep, yep. We're the ones that need to make sure that it meets our eligibility. We for the E-MDT initiative with our funding, we are looking at those cases that are 60 and over, and there's evidence of some type of abuse, again, outside of self-neglect. So yeah, I think providing technical assistance as well to the coordinators, which we'll touch base a little bit further on as well.

Jennifer Spoeri: Right. As you were speaking about that, there's got to be some kind of statistical collection here, because my next question is going to be, how are things currently going? The evaluation of that, like, how are things going, and where do you see yourself headed with this initiative?

Allison Granata: Yeah, I love where we're going. It's been really exciting to see. I'm a very visual person. As we've grown, I've colored in each county in New York state to see how we're doing, and I love seeing the entire state colored in, but ...

Jennifer Spoeri: Maybe we'll get the whole country colored in one day.

Allison Granata: Good time. I love that idea.

For 2024 for some like specific statistics, we had 398 referrals to E-MDT coordinators across the state. And then those meetings that we've referenced, and the, all those times that the professionals are coming together, there were 459 meetings across New York state specifically thinking about these elder abuse cases. And so it's really exciting to think about the dedication and the work that was done in these cases. I also love being able to share the restitution data, because that's one of the fun numbers. But Lindsay, you pulled that together. So I'll pass that over to you to share that fund number.

Jennifer Spoeri: We like to hear that word restitution.

Lindsay Calamia: Yes, our restitution or recovered funds. We've been tracking the information as best that we can since 2014, so I'm going to give a current, updated number from 2014 to 2024, the E-MDT interventions have led to a reported \$6.5 million in restitution.

Jennifer Spoeri: Oh, wow.

Lindsay Calamia: For our cases and then of which approximately that we know \$1.6 million has been returned directly to victims. That's a tricky number to track over the years, but we do the best that we can in terms of trying to find how much has been recovered.

Jennifer Spoeri: That's impressive.

Lindsay Calamia: Proud of, yeah.

Jennifer Spoeri: You should be very proud of that, because, you know, most of the time it's like getting blood from a stone. So the fact that you got over a million dollars back for people, or 1.6 you said?

Lindsay Calamia: Yeah.

Jennifer Spoeri: Pat yourselves on the back. Yeah, recovered.

Lindsay Calamia: I'm guessing, I would imagine that number is higher based on restitution awards. It's just a matter of how far out can we track that information over time?

Jennifer Spoeri: Yeah, just like the number that's exploited is higher because we know they're underreported, the cases of financial exploitation, cases of elder maltreatment in general, or it's under reported. I always love this on every podcast when we have a program or initiative. So any lessons learned, got any sage advice?

Lindsay Calamia: I think one, one of the things that is interesting, a lesson that we have learned early on in the initiative was the need for to provide funding for one of our enhancement services, which is the community legal services or the civil legal service providers. Initially, that was not identified as an enhanced specialty service that we could fund for direct work on civil legal intervention, and it was really based on feedback from the teams that were doing the work and really identifying a gap between not all cases are criminal, and not all older adults or victims of abuse want to pursue criminal action, but there may be civil remedies that can really help find some type of justice, restitution, some favorable

outcome for that older adult who's really driving the case forward. That was a very, I think, pivotal moment for us.

Jennifer Spoeri: Eye opening.

Lindsay Calamia: Yeah, absolutely. And based on that feedback, we were able to say, Great, let's incorporate that into our enhancement services that we can now provide funding for that direct work. I think another lesson that we learned pretty early on is if and when it's possible for communities, I mean, we we're able to do this in New York state, is to fund a full-time E-MDT coordinator. We had initially had some mini like pilot funding that we were able to do these little mini grants for communities to at least get started with our expansion for the E-MDT initiative. This was before we received our OVF funding in 2017, but it was really difficult for to operate an E-MDT and also have other job responsibilities. If, especially if you're like a direct service provider.

Jennifer Spoeri: That's what we hear all the time. Funding for who's going to do the coordination? You don't realize how much time it takes to coordinate the all the different factions.

Allison Granata: Absolutely, like the relationship building and the outreach and the communication in between meetings on cases, to help things move forward. I mean, it really is a full-time role.

Jennifer Spoeri: So even just scheduling it and taking minutes, I mean, that's time consuming.

Lindsay Calamia: It, it totally is. Yeah, so that was a really important lesson learned for us as well, I think, and something that other communities are definitely still learning and, and trying to grapple with, right?

Allison Granata: I agree. I also think that, like, you know, from a development standpoint, things might be slow at first, and that's okay. I think it's like Lindsay said, it's there's so much of that relationship building that needs to happen, and a lot of that is what gets people to keep coming to the table, whether it's in person or virtual. And so that's another spot where also the having a dedicated coordinator can really assist with somebody who has the time to develop those relationships. But I think that some people get very discouraged as their first starting. I can say that I did myself, but it's it is certainly something that it's a process, and despite how kind of one of the hot topic items that like MD teasers are right now, it still may not just immediately start.

Jennifer Spoeri: I love that point, because it's true. At the beginning, it's kind of slow. You're building the relationships, you're developing an understanding of what each other does and what you can and can't share, but also just creating that trust, because, you know, you've got people with very different limitations on what can be shared or discussed. And so the trust and relationship building is huge. So.

Allison Granata: Yeah, I think it was really exciting on our end, just to when my team celebrated their 10th anniversary of when they had first reviewed our first case, I threw a 10th birthday party for us, because ...

Jennifer Spoeri: That's awesome.

Allison Granata: It was exciting. And, you know, we've stayed together for we're now at what, 12 years now, I think, with a bunch of my teams, and so it's exciting to think about the fact that we've continued to do this work together for 12 years, and some of them are still my original team members.

Jennifer Spoeri: Oh, that's huge.

Allison Granata: Despite a lot of the turnovers.

Lindsay Calamia: Yeah, I think to add to that, but building trust and relationships, I would say a lesson or piece of advice for newer teams would be cross train, cross train, cross train, among disciplines.

Jennifer Spoeri: That's beautiful.

Lindsay Calamia: As much as possible. Learn if it's many presentations at each meeting where you have a representative from different agencies saying what they can do and what they can't do, because I think we all come with our own assumptions, and especially with our experiences as direct service providers in the field. For example, my background in case management, I thought I knew what law enforcement could and couldn't do and what their responsibility was. And then I, you know, those expectations drive your interactions at the meeting. And so through an E-MDT meeting, and some of the E-MDT work when I was a case manager, because I did start off as a team member who would bring cases to the team.

Yes, I definitely learned through that process that my assumptions were completely misguided. And, you know, some of them are wrong, but some of them excluded opportunities. There were things I didn't know I could ask of other team members that they could do. So I think, you know, that cross training is so important. And one other piece of advice, I would say, or lesson learned, that we are still learning, is that the teams, you know, the cases that are reviewed at the team level, the goal isn't necessarily always criminal prosecution. And I think there, that tends to become a focus point, whether it's because it's a natural outcome that you can point to, then it kind of like gets stuck in the mind of, oh, I'm only going to bring cases that need criminal intervention, or, you know, something to go through that ...

Jennifer Spoeri: Prosecution.

Lindsay Calamia: Prosecution, thank you. Yeah, and that is very limiting. There are so many other outcomes that can happen as a result of the multi-disciplinary work. And so keeping, especially for newer teams, keep your eligibility wide open. Look for cases that any, any case, bring any case, and learn about how everybody else on the team works and what you can do together as a team. I think you'll be really surprised at where a case can go from where it starts. You might think, Oh, I'm just going to bring it to the team so that I can get some involvement from APS, for example. Well, I'm talking to APS, so that's a bad example. But hey ...

Jennifer Spoeri: Everybody comes to APS, Lindsay. Everybody does. We have that magic wand, right? But you have to know whose magic wand to pull on at what time.

Lindsay Calamia: Yeah. Wouldn't it be great if APS caseworkers received a real magic wand?

Jennifer Spoeri: I've thought about that. I've thought about that. It gets expensive.

Lindsay Calamia: Okay, so let's say initially you think, Hey, I'm going to refer a case to the team because I want forensic accounting. And you might be surprised at really how many other disciplines on the team are able to say, hey, wait a second. You know, what about this? And have we looked at that, or have we considered this other option? And so I think it's just really important to bring as many cases as possible to really learn what your team specifically, what cases fit best for them and their expertise, the people that you have at the table.

Jennifer Spoeri: You guys have a lot of good advice here. If anybody listening to this podcast has additional questions or wants to reach out, how do we get a hold of you?

Allison Granata: There are a couple of ways. I mean, I think the biggest way would be to reach out to us. Our emails is one great spot. I'll give you mine. So I'm the one speaking right now is Allison. So, Allison Granata, I'm agranata@lifespan, L, I, F, E, S, P, A, N, dash roch.org. So, agranata@lifespan dash roch.org.

Jennifer Spoeri: Great. And Granata is spelled G, R, A, N, A, T, A.

Allison Granata: Correct, thank you.

Jennifer Spoeri: Just like it sounds.

Allison Granata: Yeah, yeah.

Jennifer Spoeri: Like my last name. That's great. All right. And then, in closing, what great information you guys have shared. This has been an incredible podcast. Is there anything that you want to leave people with that, you know, I didn't give you enough time for?

Allison Granata: I don't, I don't think so. I know, Jennifer, you're and kind of stealing what you're going to reference next, but our, we have a New York state initiative website. It's www.nysemdt.org, and on that, we have a lot of great information, including an interactive statewide map that if you are in New York state, you can find who your E-MDT coordinator is to contact. My contact information is also on there, but we also have videos that can show, like a sample E-MDT meeting, as well as like a case consultation, what that may look like with an E-MDT coordinator. And then we also interviewed some of the specific disciplines that sit on our teams, and they, we share some feedback from them in terms of what their role is on the, the E-MDTs, and APS was also one of the ones that we highlighted.

Jennifer Spoeri: Well, we're the integral one, I always say, right?

Allison Granata: Yeah.

Jennifer Spoeri: APS, but you know, I'm biased.

Allison Granata: Oh no, I agree.

Jennifer Spoeri: So those magic wands, you know, everyone's got their own different version of magic wands, I suppose. And this has just been fantastic. I really, really appreciate both of you giving your time, sharing your expertise and knowledge. And again, that website that Allison mentioned is nysemtdt.org. So it sounds like there's a wealth of information there. And with that, we will close the podcast. And thank you all again so much.

Allison Granata: Thank you.

Lindsay Calamia: Thank you, thanks for having us.

Closing

Andrew Capehart: Thanks so much for listening. To give us feedback on this podcast or reach out to us, please visit our website at APSTARC.acl.gov. This podcast was created by the Adult Protective Services Technical Assistance Resource Center, administered by WRMA, Inc. under contract number 140D0424F1178, from the U.S. Department of Health and Human Services, Administration for Community Living, Administration on Aging. Special acknowledgement to the National Adult Protective Services Association, who contributed to this podcast. The views expressed in this podcast do not necessarily reflect the views or policies of the Administration for Community Living or the U.S. Department of Health and Human Services.