

Archstone Foundation Elder Abuse & Neglect Initiative: Evaluation Findings from Phase I & II (January 2006 – December 2010)

EXECUTIVE SUMMARY

The Measurement Group¹

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INTRODUCTION AND BACKGROUND

Scope of this Document. This is a summary report on activities and outcomes of 20 grantees funded under the Archstone Foundation Elder Abuse & Neglect Initiative. The report covers both Phase I and II of the Archstone Elder Abuse and Neglect Initiative. The report is part of an independent evaluation.²

Initiative. In 2006, the Archstone Foundation launched a 5-year \$8 million Elder Abuse and Neglect Initiative (Initiative) with the goal of improving the quality and coordination of elder abuse and neglect services in California. By design, the Initiative was divided into two phases. Phase I (January 2006 through December 2007) was for developing and implementing programs and for pilot testing services. Programs were funded with the assumption that a three-year Phase II period might also be funded, which was subsequently approved by the Foundation's Board of Directors. Phase II (January 2008 through December 2010) was used to refine and further test service models, develop best practices, and disseminate findings. In total, there were 20 different projects in Phases I and II. In Phase I, 18 projects spent two-year total budgets ranging from \$33,757 to \$743,672. In Phase II, 18 projects (including 16 continuing from Phase I and 2 projects new to Phase II), spent three-year total budgets ranging from \$52,684 to \$393,007. Over the two Phases there were four Education and Training of Mandated Reporters of Elder Abuse Projects, six Multidisciplinary Team Development Projects, four Forensic Center and Center of Excellence Development Projects, one Financial Protection Project, two Systems Analysis Projects, one Legal Protection Project, one Long Term Care Ombudsman Services Project, and a Convening and Technical Assistance Center.

Rationale and Background for the Elder Abuse and Neglect Initiative. Elder abuse is a crime without boundaries, crossing all racial, social, class, gender and geographic lines. As the older adult population in the United States continues to increase, it is anticipated that the rate of elder

¹ Dr. Huba and Dr. Melchior were assisted in data analysis and report preparation by Kendra Northington, B.A.

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abuse will also increase. There is also clinical evidence that elder abuse and neglect contributes significantly to the morbidity and mortality of older adults (Lachs et al., 1998). It is estimated that between one and two million older adults, representing five percent of the persons age 65 and older, are subject to abuse and neglect each year (Bonnie & Wallace, 2003). While elder abuse and neglect have attracted attention from practitioners and some interest from policy makers over the past two decades, it has not received significant attention from researchers or agencies that provide research funding. To begin to address the critical problem posed to society by elder abuse and neglect, the Archstone Foundation issued a statewide open call for proposals in March 2005. The Elder Abuse and Neglect Initiative was the first significant investment in California to strategically advance elder abuse and neglect services through a statewide effort.³

Scope of the Individual Projects in Phases I and II. Most of the funded projects were designed to run for five years when initially proposed, although the Initiative was organized into two phases of two and three years each. We believe that in a typical successful grant-supported project, the first year is usually spent on building infrastructure, staff, and procedures to support a successful program, as well as on pilot-testing. The major return on the first-year investment typically occurs in the second, third, and fourth years, when the highest levels of quality services are delivered. The fifth year can then be used for continuing services, disseminating the model, and securing continuation funding. Progress at the levels previously reported for this initiative after two years was atypically high for a group of grantees with these relatively modest budgets.

Data. Primary evaluation data for Phases I and II were collected using quarterly report forms designed for this Initiative and include project-specific supplementary studies of statistics from individual grants. Additionally, interviews were conducted with all Project Directors and other key staff at the end of Phase I, and additional supplemental data were collected before Phase II ended in December 2010.

Methods. The primary goal of this report is to present the themes addressed by the projects in Phases I and II and their outcomes. Activities and outcomes studied include: a) those in the original proposals; b) ones added by grantees after funding was received; and c) those to be logically expected in human services projects. Documents were analyzed using judgment-based and automated coding methods in NVIVO 8.0. Quantitative indicators were developed and equated across projects; statistics were calculated in SPSS 17.0. More than 120 key areas of programmatic activity were examined.

PROJECT IMPLEMENTATION AND COLLECTIVE OUTCOMES

Implementation and Process in Projects. Although the Archstone Foundation funded the Elder Abuse & Neglect Initiative EANI projects within broad categories – Education and Training of Mandated Reporters of Elder Abuse, Financial Protection, Forensic Center and Center of Excellence Development, Legal Protection, Multidisciplinary Team Development, Long Term Care Ombudsman Services, Systems Analysis, and Convening and Technical Assistance – it was

³ This section was adapted from materials written by E. Thomas Brewer, MSW, MPH, MBA, and Laura Giles, MSG, of the Archstone Foundation, which appears in the *Journal of Elder Abuse & Neglect*, 1540-4129, Volume 22, Issue 3, 2010.

found that, as implemented, the projects did not fall into discrete groups. For instance, while four projects were funded to work on the education and training of mandated reporters, all projects actively engaged in conducting trainings. Similarly, 16 of the projects worked with local multidisciplinary teams in some capacity, although only six projects were formally funded to develop and lead multidisciplinary teams. While there were four Forensic Center projects, many of the programmatic elements of the Centers, including multidisciplinary diagnostic procedures and legal interventions, were part of the remaining projects in their comprehensive service system development efforts. Although only one project was specifically funded to work on issues related to financial protection, asset preservation was a focus in most projects. While two projects were funded to analyze large systems of services (the judicial system and County Adult Protective Services Departments), APS services and court referrals were part of many projects. One project was specifically funded to work on legal protection, but many of the projects offered legal assistance to clients. Only one project was funded to provide Long Term Care Ombudsman services, yet many projects work with their local ombudsman and other care providers. Finally, while the Convening Center was charged with fostering information sharing and collaboration as well as providing technical assistance, these functions also occurred between pairs of projects outside of the formal convening process. This Initiative followed a typical pattern for multi-grant human services initiatives in that the projects were more similar in their goals, objectives, and outcomes than formal funding categories would suggest.

Collective Outcomes. In Phases I and II, the 20 separate grants collectively produced at least 1,222 significant *unique*⁴ outcomes.⁵ Outcomes include establishing effective advisory boards and implementation teams; conducting meetings that produce improvements in agencies and service systems; developing effective training curricula; effectively training program staff, elders, and mandated reporters; disseminating information; screening elders and providing intensive assessments for those who meet the criteria for services; using multidisciplinary teams to effectively assess and triage cases; intervening to preserve financial assets and quality of life; and studying and changing large-scale systems of care. Outcomes are clustered into overlapping groups. Figure 1 gives the percentage of significant outcomes that are exemplars of each theme. Note that specific concrete examples of outcomes are given in this report immediately following this section. There is not a perfect one-to-one correspondence between the categories of outcomes given in this section and specific numbers in the later section because at least several of the categories are related to the more specific exemplars with these categories, in some cases, being precursor conditions for the specific examples.

⁴ The phrase “unique outcomes” refers to the outcomes of an individual project; more than one project may have produced similar outcomes. The estimate of 1,222 significant unique outcomes is the sum of the unique outcomes in each of the 20 projects.

⁵ Considering the fact that in many cases the same outcomes could be achieved each quarter of the funding period, an estimated 11,565 outcomes were observed, with many of these overlapping or repeating each quarter.

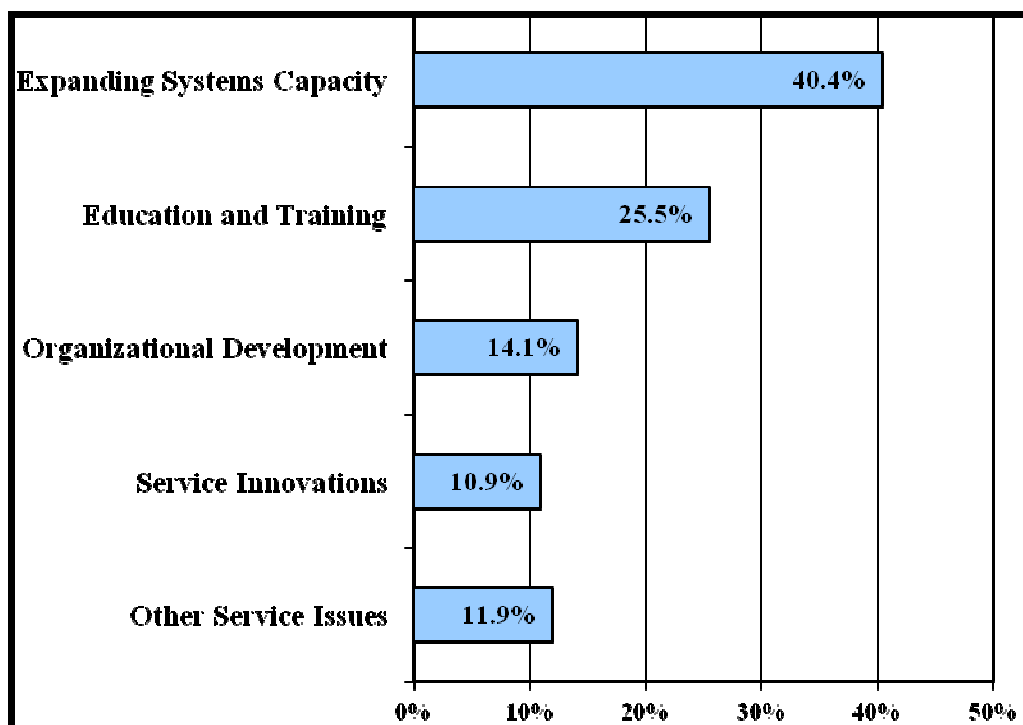


Figure 1. Percentage of Outcomes in Major Categories⁶

Phases I and II Selected Aggregate Specific Outcomes. Within each of the five major categories of outcomes that projects produced, specific types of outcomes were achieved. Selected exemplars of the collective quantitative outcomes achieved by the projects can be found

⁶ Notes for Figure 1

Expanding Systems Capacity. 40.4% of the outcomes were related to improving service systems by expanding the number and quality of professionals and organizations dealing with elder abuse and neglect and meeting mandated reporter requirements.

Education and Training. 25.5% of the outcomes were related to education, training, and technical assistance efforts using strategies such as developing curricula, expanding the capacity to train mandated reporters of elder abuse and neglect, providing courses through classroom instruction and the Internet, working intensively with other professionals as consultants, and informing elders about financial abuse and strategies for avoiding predators.

Organizational Development. 14.1% of the outcomes were related to strategies for directly improving the organizations that provide elder abuse and neglect services including using consultants, developing better organizational and budgetary controls, establishing quality improvement methods, involving key stakeholders and boards, and linking agencies.

Service Innovations. 10.9% of the outcomes were related to improving services using best practices, incorporating cultural competence, empowering providers and clients, addressing service gaps, developing collaborations, and utilizing volunteers.

Other Service Issues. 11.9% of the outcomes were methods for resolving problems and barriers, forming linkages, and using information from key clinical cases.

below. Some of the specific quantitative outcomes fall within more than one of the five major types of outcomes listed earlier. Most projects are not designed or expected to produce more than several of these outcomes and no project is designed to produce all of them.

- **Infrastructure Development Meetings.** This category includes multi-agency meetings, whether convened by the project or another agency, which are intended to develop or strengthen the infrastructure of a service continuum or individual agency. The 20 projects conducted or participated in a total of 8,619 meetings for infrastructure development, planning, or coordination (median⁷ = 364 meetings) to build a lasting capacity within California for services related to elder abuse and neglect prevention and intervention. An example of how one project developed infrastructure was through weekly meetings with Adult Protective Services for case consultations and assistance. On another project, the staff met numerous times with the director of an Emergency Medical Technician (EMT)/Paramedic Program to help develop a training for emergency response workers. One project developed ties with the local Ombudsman and Regional Center programs by routinely contacting them about the project's services and encouraging them to present cases.
- **Trainings and Number Trained.** Nineteen projects conducted a total of 1,270 formal trainings (median = 29 trainings) for 26,136 individuals (median = 508 people). As defined for this evaluation, formal trainings have curricula and specific goals and objectives for detailed knowledge and skills acquisition. Although not necessarily so, trainings tend to last at least half a day, and are often longer. The majority of the Elder Abuse & Neglect Initiative trainings were for mandated reporters, including social workers, law enforcement, clergy members, and physicians who care for older adults and are in a position to recognize possible signs of elder abuse. For example, one project enlisted the help of a geropsychologist to help provide training to Adult Protective Services interns. Another project held multiple trainings for lay leaders and clergy on mental health services, an important part of dealing with the effects of abuse.
- **Presentations and Attendance.** Nineteen projects gave a total of 2,135 presentations (median = 41 presentations) to a total of 142,427 (median = 1,345 people) older adults and/or seniors, general staff members, other agencies, and mandated reporters. As defined for this evaluation, presentations are informational sessions designed to provide basic information about elder abuse without specifically developing professional skills. In virtually all cases, presentations are made to the general public, in contrast to trainings, which are delivered to professionals and service provider audiences, especially mandated reporters. One such example is the multiple Scam Prevention presentations and seminars at churches, retirement communities and club meetings that a project hosted to reach potential victims. Another project presented at various conferences including the Gerontological Society of America and the International Conference on Violence, Abuse, and Trauma, while a different project presented at a workshop on elder abuse at a Statewide Collaborative Justice Conference workshop.

⁷ All per project medians reported in this section do not include the projects with no activities (or 0 events). The medians are for the projects that had at least 1 activity (event).

- **Media Events.** Nineteen projects participated in a total of 447 media events (median = 20 events). It is estimated that the media events reached at least 12,152,400 individuals (median = 45,433 people). As defined for the purposes of this evaluation, media events include interviews, news articles, targeted flyers and other informational materials, and may occur in both print and electronic formats. Specifically, these events included interviews on television and in print media (ranging from the New York Times and the NBC Today show to local newspapers and television shows); articles and radio shows in languages other than English; press releases; DVDs; a bus sign campaign in a major city, and flyers. For instance, a project distributed English and Spanish brochures and DVDs on financial protection and crime prevention to local police departments, self-help centers, and living communities. Another project participated in a health fair that was covered by Korean and Spanish television, and the English-speaking press. To reach more seniors, one project distributed a Public Service Newsletter about lotto scams to 2,000 service providers.
- **Volunteers.** Eighteen projects recruited a total of 764 volunteers (median = 23 volunteers), of whom 629 (median = 20 volunteers) actively participated in project activities. Volunteers are defined as professionals or community members who provide professional, paraprofessional, or community services to the project. The Elder Abuse & Neglect Initiative volunteers filled a variety of roles, from participating in multidisciplinary team case reviews to delivering presentations to mandated reporters and/or seniors. The projects found various ways to recruit and involve volunteers, such as one project that actively targeted local professional associations to recruit volunteers to help educate seniors about financial abuse. Another project was able to enlist the help of five county agencies that provided managers and training officers to evaluate and review proposed curriculum. Staff from one project worked with active legal volunteers including law students, paralegals and attorneys.
- **Assessments.** Fifteen projects conducted a total of 14,997 brief assessments or screenings (median = 444 assessments) designed to identify elders needing more intensive assessment. As defined for this evaluation, brief assessments or screenings consist of a short review of materials provided directly by the client or obtained by authoritative reports, including validated questionnaires or structured surveys. Brief assessments or screenings are conducted by a trained professional or paraprofessional. Fourteen projects conducted a total of 1,630 formal and informal assessment meetings (median = 77 meetings) to decide whether and how to triage cases that screened positive for likely elder abuse and/or neglect. As defined for this evaluation, formal and informal assessment meetings are consultations among two or more professionals or trained paraprofessionals about whether the case should be referred at the time for further formal medical-psychological-legal assessment. For example, through monthly meetings one project staffed and tracked the cases of over 100 elders with impaired and/or absent decision making capacity.
- **Enhanced Services and Improved Quality of Life.** As a result of expansions and enhancements that 15 Archstone projects made to their service delivery system, a total of 4,751 clients (median = 224 clients) received augmented medical, financial, psychological and/or case management services. For instance, one project regularly worked with the police

department, Adult Protective Services (APS), Public Guardian, City Attorney and District Attorney to provide coordinated services to clients. Nineteen projects worked with 233 affiliated agencies (median = 7 agencies) to either develop or significantly enhance their capacity to provide services for victims of elder abuse. Interagency enhancements include instances where a partner agency is trained to provide services or referrals, or when project staff works cooperatively on the same cases with partner agencies. For example, one project conducted nine organizational assessment meetings to formulate plans for helping agencies to develop elder abuse service capacities, often in facilities where elders previously were not receiving the care they needed.

As defined for the purposes of this evaluation, at least 560 elderly clients have demonstrated significant improvements in their quality of life resulting from enrichments to the elder abuse service delivery system. These clients were protected from abusive caregivers or family members; had financial assets or other resources preserved; and/or were removed from substandard living environments and other conditions of neglect. This number was derived from a careful analysis of all information provided by the grantees on individual cases on a case-by-case basis. Additionally, Archstone EANI projects identified 77 care facilities that were found to be inadequate or unlicensed and were subsequently closed. It is estimated that 1,536 additional elders may have had their quality of life improved as they were relocated from these unlicensed facilities to be with family or moved to licensed care. In the working definition of improved quality of life used here, it is assumed that the improvement of medical, financial, psychological, or patient management conditions for individuals constitutes increased well-being, or at the least provides a highly enhanced service environment for the client which, in most cases, is viewed by the service providers and the client as an improvement. For example, one project worked with Public Guardian and nursing facility staff to reconnect an older woman with her family and arrange for placement closer to her family; her mental health noticeably improved with family involvement. Another project's efforts resulted in three elderly clients demonstrating significant improvements in their quality of life including better nutrition, healthcare, and financial stability resulting from enrichments to the care system through education and training.

- **District Attorney Filings.** Seven projects worked with local law enforcement to file a total of 148 cases (median = 11 cases) with the District Attorney (DA). Of the 148 filings, 57 were successfully prosecuted and an unknown number are still in progress. As an example, one project submitted a case for investigation to the DA where the estimated loss being pursued was \$150,000. In another case, the DA, with help of project staff, was able to convince the judge that a crime had been committed in a sweetheart scam, and obtained a conviction. One project assisted the DA in successfully prosecuting a son for abuse of his elderly father. Based on the reports of the projects and our analysis, it is our belief that the majority of these 148 filings would not have occurred without the Archstone-supported projects, either because the cases would not have come to the attention of law enforcement or they would not have been identified correctly.
- **Asset Preservation.** In aggregate, thirteen projects preserved over \$50.9 million in assets for 193 clients using interventions funded by the Archstone Foundation. Of these 193 cases, 66

were resolved by conserving the elder, either through the Public Guardian or privately; 46 were resolved through action taken by the District Attorney; 20 were resolved through litigation by public attorneys or other law professionals; 16 were resolved through negotiations or settlements with the offender; and 45 were resolved by other means, such as an elder deciding not to enter an exploitive agreement after receiving advice from project staff. As defined for the purposes of this evaluation, asset preservation includes a number of ways that financial resources belonging to the older adult are preserved for direct care of the elder. The definition also includes actions that safeguard vulnerable adults' assets from family members or non-family members seeking to exploit the older adult's diminished capacity or loneliness. Estimates of the amount preserved were taken directly from approximations of the value of a home or the balance of a bank account or inappropriate charges from real estate brokers that were provided by the projects. In cases where home values were not available, an approximated value was determined using published values of median home prices in the area or approximations of the amount of money an individual from the reported socioeconomic group of the client might have in the bank. Approximations were intentionally set low and may be seen as downward biased. Approximately \$7.40 in seniors' assets was preserved for each \$1.00 of Archstone Foundation funding that was expended through December 31, 2010. For instance, one project's interventions resulted in a client retaining his \$400,000 home and \$100,000 of other financial assets. One project was able to preserve the assets, including homes and restitution of funds, for more than 30 clients; another project helped a client save \$5,700 in closing costs with information he received from a face-to-face credit counseling session.

- **Leveraging.** Nineteen projects leveraged more than \$13.2 million in additional grants and resources, due to the pilot work, staff support, and credibility derived from receiving Archstone funding. To be counted as leveraging, the project needed to have stated that there was significant pilot work or staff support accomplished with Archstone Foundation funding; it is recognized that other sources may have also supported pilot work or staff support in writing the grant which means that the number for leveraging may be an over-estimate. The projects were successful in leveraging approximately \$1.93 in additional resources for each \$1.00 of Archstone Foundation funding expended, resulting in approximately \$2.93 in resources being available for elder abuse and neglect programs. The projects leveraged a variety of resources. For example, one was able to obtain more than \$317,000 of legal in-kind services from professional volunteers. Another project was awarded a grant to make its curriculum for Health Care Interpreters available for local community colleges. One project received multiple grants from the National Institute of Justice to further fund elder abuse research; another received an additional philanthropic grant to support a geropsychologist.
- **Early National and International Impact.** Although all 20 projects are physically located in California and the scope of the Archstone Elder Abuse & Neglect Initiative was originally focused on impacting elders statewide, the successes and impact of the Initiative have already been felt on both a national and international level. Thirteen projects have provided technical assistance, training, informational presentations, or case consultations to professionals and agencies located in 40 other states and the District of Columbia as well as twelve foreign countries (Australia, Canada, Columbia, England, Israel, Japan, Mexico, Philippines, South

Africa, South Korea, Sweden, and Switzerland). Figure 2 shows the states where such linkages have been made and services have been provided. We believe that there has also been indirect impact through knowledge diffusion from people trained who provide information to other colleagues in locations where there has been no direct Archstone-funded work.

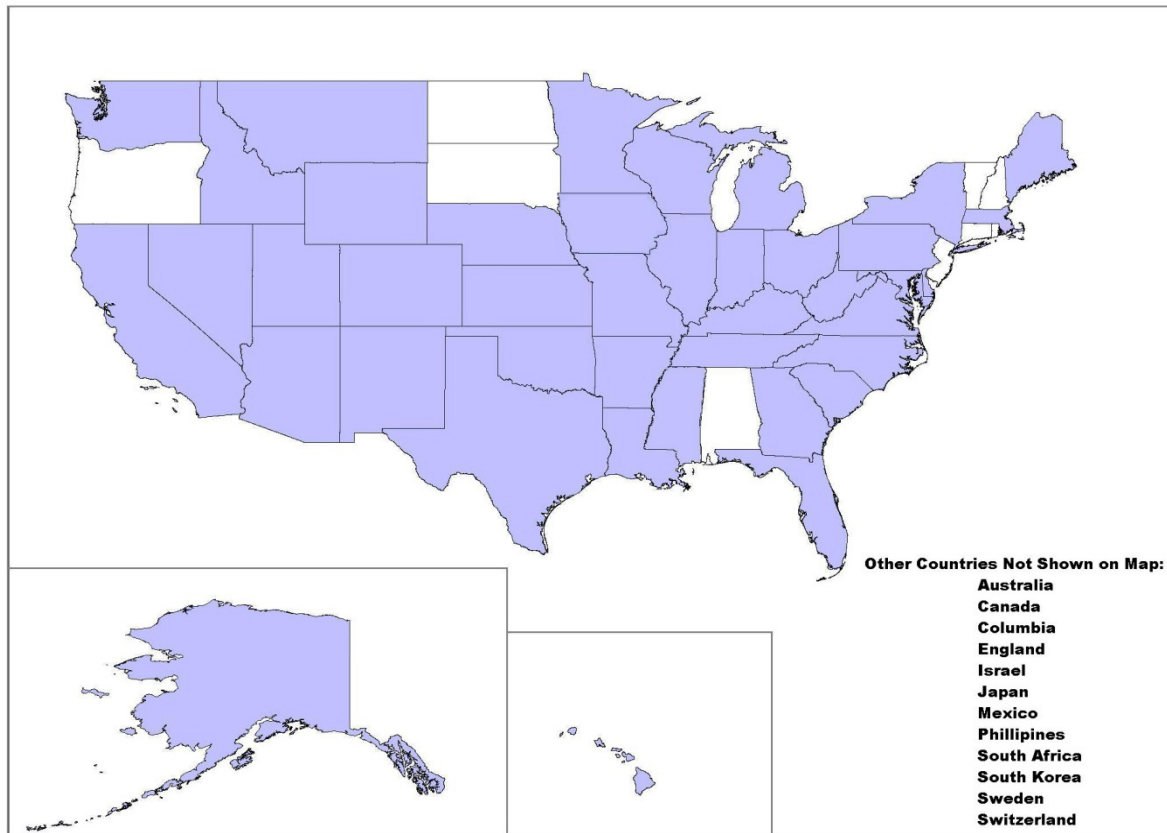


Figure 2. States Benefitting from Technical Assistance and Training Provided by Projects of the Elder Abuse & Neglect Initiative.

Cost-Effectiveness. As context for the evaluation results and lessons learned, the total expenses for the 20 Elder Abuse & Neglect Initiative projects over five years were \$6,885,416. The average amount spent in Phase I was \$178,938 (median two-year expense = \$107,921; the median expense is smaller than the mean expense because a few projects received relatively large awards compared to the majority of the other projects with more modest budgets). The average Phase II expense was \$183,227 (median three-year expense = \$158,688). We believe that the Elder Abuse & Neglect Initiative programs represent bargains, given their productivity, willingness to experiment with new models, and the outcomes they achieved almost immediately with modest funding levels. It is almost unprecedented to find projects with the modest budgets of these that can produce such large effects in the extremely important quality of life for their clients within such a short period of time.

Grantee Feedback about the Archstone Foundation. The Foundation was perceived with great gratitude by all grantees. Among the successes perceived by grantees were the general project management style of the Foundation staff and the respect that the grantees felt accorded as professionals. Grantees valued the willingness of the Board and Foundation staff to make one of the earliest commitments to elder abuse and neglect services and the encouragement for creative program designs. Grantees perceived that the activities supported by Archstone Foundation funding had helped to increase the capacity of their agencies to sustain similar services post-Archstone funding. In our judgment, the compliments paid to the Foundation were sincere and deeply held. It was striking that there were no substantive complaints by any grantee about the level of funding, and while most project directors stated that they could design more elaborate and comprehensive projects at higher funding levels, they agreed that the levels of funding matched their work plans.

CONCLUSIONS AND RECOMMENDATIONS

We have drawn the following conclusions and make the following recommendations as the independent evaluators of this Initiative. These conclusions and recommendations were made without staff input or review. Our conclusions follow.

- The projects of this Initiative are collectively exceptionally productive. Service activity levels are high given the funding levels. We attribute this productivity to a number of factors, including the fact that there has been a pent-up demand for funding for program development in this area resulting in the extreme interest by professionals in what might otherwise be deemed modestly funded grants. The productivity was sustained through all years of the project.
- Significant innovation is being produced. Major training curricula have been developed, large numbers of mandated reporters have been trained, permanent infrastructure has been developed, and the quality of life of many older adults has been improved through innovative services. We believe that the innovation will be continued in the future.
- Individual projects were managed in efficient and thoughtful ways by the project staff; Foundation staff maximized project performance; and the mechanism of periodic project convenings and conference calls has strongly encouraged the cross-fertilization of ideas and successful methods among the projects. One of the major strengths of the Initiative has been the extremely productive group collaborative and consensus process. Having participated (as either the Convenor or as a grantee) in more than 20 such processes, this was the most successful one we have seen.
- In our judgment, the Archstone Elder Abuse & Neglect Initiative has produced a number of prototypes that can be considered national demonstration models. Among the models that we believe should be heavily promoted in California and across the nation are the Forensic Centers, the development of a Center of Excellence, small county models for impacting forming coalitions and making strategic interventions, the importance of

mandated reporters and methods for training them to recognize and report elder abuse, and the special importance of including clergy as reporters when elder abuse is suspected. A number of these models and others have been highlighted in a Special Issue of the *Journal of Elder Abuse and Neglect* published in September 2010.

- Overall we attribute the cost-effectiveness of the Elder Abuse & Neglect Initiative Projects to three factors: 1) this area has historically received little funding and, hence, there is great demand for funds and services; 2) the Foundation selected highly motivated projects; and 3) these programs have been managed effectively, allowing projects to use innovative methods without burdensome administrative requirements. While it is not clear whether later implementations of the same models would be as cost-effective as administrative overhead is added by some academic institutions, it is clear that even if later implementations of the same models were somewhat less cost-effective, they would still be considered to be very high-return models.
- The funds made available by the Archstone Foundation were used very strategically and the design of the overall Elder Abuse & Neglect Initiative was extremely effective. It is striking that so much was done on so little and that the infusion of the Archstone funds served to mobilize professionals who were already highly committed to this process. Even more importantly, the innovative Archstone projects did bring many new participants into the service provider network and showed County departments and individual providers how their efforts could be multiplied in Centers and coalitions.
- The Archstone Foundation Elder Abuse & Neglect Initiative has already sustained its impact beyond the original project period. Several of the work groups formed as part of the Initiative are continuing their individual and collective efforts, even though the funding from their Archstone Foundation EANI grant has ended. The Archstone Foundation's decision to provide ongoing support to the University of California, Irvine Convening and Technical Assistance Center is helping to sustain the momentum of the work started during the five-years of the Elder Abuse & Neglect Initiative.
- We conclude that funding these projects as an Initiative was an effective mechanism for generating model programs for Elder Abuse & Neglect, and in creating synergy among programs throughout California (and beyond) to successfully accomplish this aim. The Convenings were an especially important aspect of the Initiative that promoted networking and working towards shared goals.

To reiterate, the Archstone Foundation Elder Abuse and Neglect Initiative included exceptional projects that were highly motivated to succeed, took appropriate steps in implementation, and should be seen as a significant contribution to the larger field interested in intervening with and preventing elder abuse and neglect nationally.

- The funding provided by the Archstone Foundation has produced a number of service models that should be continued and replicated in California as well as a large number of direct services. The work done has made a significant difference in how elder abuse and neglect is prevented, recognized, and treated and directly benefits the people of California. Significant models were developed for County collaboratives of agencies and individual providers. Significant models were developed for training mandated reporters. Significant infrastructure was developed.
- The funding provided by the Archstone Foundation has produced a number of service models that should be initiated and replicated throughout the United States.

Archstone Foundation Elder Abuse & Neglect Initiative: Evaluation Findings from Phase I & II (January 2006 – December 2010)

REPORT OF MAJOR FINDINGS

The Measurement Group¹

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INTRODUCTION AND BACKGROUND

Scope of this Document. This is a summary evaluation report on the Phase I and II activities and outcomes of 20 grantees funded under the Archstone Foundation Elder Abuse & Neglect Initiative. The report is part of an independent cross-cutting evaluation.² The intent of this report is to present an overall summary of the initiative over five years of funding. Our analysis is a cross-cutting one in that the emphasis here is more on the overall activity level, outcomes achieved, and impact of the initiative than it is on any one project. Our collective analysis will determine to what extent the overall initiative of innovative programs in elder abuse and neglect services has been successful in raising public awareness about the problem; building a cadre of committed and skilled service providers (including those mandated by California law to report suspected cases); developing models for forensic centers and centers of excellence so that clients may be directed appropriately to medical, social, and legal services; developing programs for assisting elders who are, or may become, victims of financial predators; and building an action plan to expand the service system in the future.

Initiative. The Archstone Elder Abuse & Neglect Initiative (Initiative) was funded from January 1, 2006 through December 31, 2010. Phase I (January 2006 through December 2007) was for developing and implementing programs and for pilot testing services. Programs were funded with the assumption that a three-year Phase II period might be funded, which was subsequently approved by the Board of the Archstone Foundation. Phase II (January 2008 through December 2010) was used to refine and test service models, develop best practices, and disseminate findings. In Phase I, 18 projects were funded with two-year total budgets ranging from \$33,757 to \$743,672. In Phase II, 18 projects, 16 continuing from Phase I, and 2 new projects to Phase II, spent three-year total budgets ranging from \$52,684 to \$393,007. Between the two phases there were four Education and Training of Mandated Reporters of Elder Abuse Projects, six Multidisciplinary Team Development Projects, four Forensic Center and Center of Excellence

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Development Projects, one Financial Protection Project, two Systems Analysis Projects, one Legal Protection Project, one Long Term Care Ombudsman Services Project, and a Convening and Technical Assistance Center. Some projects were permitted to modify the scope of their activities between Phase I and II. Table 1 lists the Phase I and II grantees. Note that the initiative is statewide, with grantees distributed from the Mexican border to the Napa Valley. There are concentrations of activities in the major urban centers in California including San Diego, Los Angeles, Riverside, San Jose, and San Francisco.

Table 1. Archstone Elder Abuse & Neglect Initiative Phase I and II Grantees.

Grantee	Phase	Objective
Education and Training of Mandated Reporters of Elder Abuse Projects		
City College of San Francisco San Francisco, CA	I and II	<ul style="list-style-type: none"> Designed to develop a curriculum to train emergency first responders how to assess and report elder abuse.
County of Santa Clara San Jose, CA	I and II	<ul style="list-style-type: none"> Designed to train diverse groups of clergy and lay leaders how to recognize and report elder abuse.
San Diego State University San Diego, CA	I and II	<ul style="list-style-type: none"> Designed to develop a standardized advanced training program for Adult Protective Services workers.
University of California, Los Angeles Los Angeles, CA	I and II	<ul style="list-style-type: none"> Designed to incorporate information about elder abuse and neglect into the UCLA Dental School curriculum.
Forensic Center and Center of Excellence Development Projects		
Institute on Aging San Francisco, CA	I and II	<ul style="list-style-type: none"> Designed to develop a multidisciplinary team to provide comprehensive assessments, consultation and training for the elder abuse prevention community.
San Diego County District Attorney's Office San Diego, CA	I and II	<ul style="list-style-type: none"> Designed to develop comprehensive wraparound services at the San Diego Family Justice Center for victims of elder abuse and neglect.
University of California, Irvine Irvine, CA	I and II	<ul style="list-style-type: none"> Designed to develop a Center of Excellence to provide services for local abused and neglected older adults and disseminate knowledge across the country.
University of Southern California Los Angeles, CA	I and II	<ul style="list-style-type: none"> Designed to provide expert and comprehensive case examination, documentation, consultation and prosecution for elder and dependent adult abuse cases at the Elder Abuse Forensic Center.

Table 1. Archstone Elder Abuse & Neglect Initiative Phase I and II Grantees.

Grantee	Phase	Objective
Multidisciplinary Team Development Projects		
Area Agency of Aging Serving Napa and Solano Counties Vallejo, CA	I and II	<ul style="list-style-type: none"> Designed to form a team of financial abuse specialists to help elderly victims with asset recovery and asset preservation.
City of Long Beach Long Beach, CA	I and II	<ul style="list-style-type: none"> Designed to form a multidisciplinary team to address challenging issues and elder abuse cases in Long Beach.
County of San Bernardino Arrowhead Regional Medical Center San Bernardino, CA	I and II	<ul style="list-style-type: none"> Designed to incorporate specialized medical consultation into an existing multidisciplinary team.
Conejo Valley Senior Concerns Thousand Oaks, CA	II	<ul style="list-style-type: none"> Designed to continue elder financial abuse consultation and incorporate community education into an existing multidisciplinary team.
Elder Financial Protection Network Novato, CA	I	<ul style="list-style-type: none"> Designed to create a team of financial abuse specialists to educate seniors and help professionals identify and prosecute elder abuse cases.
Riverside County Regional Medical Center Riverside, CA	I	<ul style="list-style-type: none"> Designed to incorporate geriatric assessment into an existing elder abuse multidisciplinary team.
Financial Protection Projects		
Council on Aging Silicon Valley San Jose, CA	I and II	<ul style="list-style-type: none"> Designed to implement a home lending protection project to prevent and address abusive and predatory lending practices against seniors.
Systems Analysis and Change Projects		
Judicial Council of California San Francisco, CA	I and II	<ul style="list-style-type: none"> Designed to conduct an assessment of court practices and initiatives related to elder abuse.
University of California, Irvine Irvine, CA	I and II	<ul style="list-style-type: none"> Designed to conduct an analysis of Adult Protective Services data collection systems in individual California counties in an effort to improve elder abuse reporting consistency across the state.
Legal Protection Project		
Bet Tzedek Los Angeles, CA	II	<ul style="list-style-type: none"> Designed to expand the Elder Law Clinic which guides elders and their families through the Conservatorship and Elder Abuse Temporary Restraining Order process.

Table 1. Archstone Elder Abuse & Neglect Initiative Phase I and II Grantees.

Grantee	Phase	Objective
Long Term Care Ombudsman Services Project		
Wise Senior Services Santa Monica, CA	I and II	<ul style="list-style-type: none"> Designed to coordinate investigations of unlicensed long term senior care facilities.
Convening and Technical Assistance Center		
University of California, Irvine Irvine, CA	I and II	<ul style="list-style-type: none"> Designed to provide technical support and organized convenings and monthly conference calls for the Elder Abuse & Neglect Initiative grantees.

The projects are located throughout the state, in areas well-situated to provide local examples of innovative programs to California counties. Figure 1 shows the locations of the projects within the state.

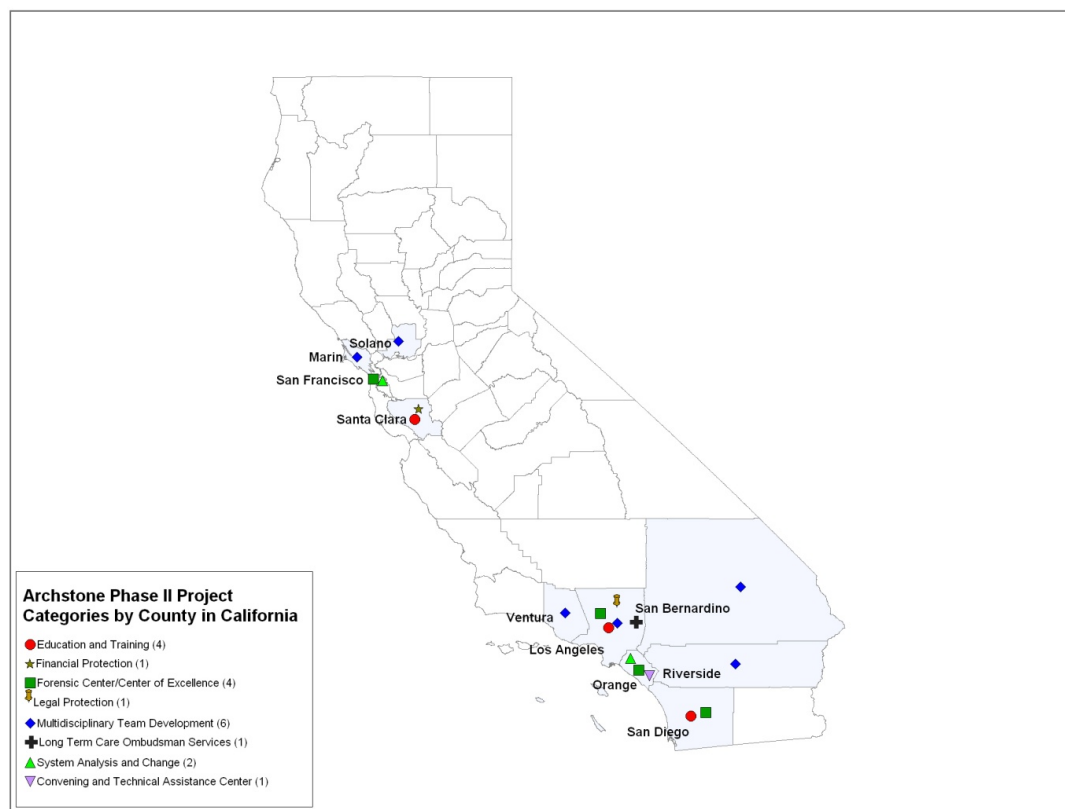


Figure 1. Location of the 20 Archstone Foundation Elder Abuse & Neglect Initiative Projects.³

³ Note that placements within California counties are arbitrary and simply centered for clarity. For instance, the San Bernardino County project is located near the western (left on the state map) border of the county and not in the county center.

Scope of the Individual Projects in Phases I and II. Most of the funded projects were designed to run for five years when initially proposed, although the Initiative was organized into two phases of two and three years each. We believe that in a typical successful grant-supported project, the first year is usually spent on building infrastructure, staff, and procedures to support a successful program, as well as on pilot-testing. The major return on the first-year investment typically occurs in the second, third, and fourth years, when the highest levels of quality services are delivered. The fifth year can then be used for continuing services, disseminating the model, and securing continuation funding. Progress at the levels previously reported for this initiative after four years was atypically high for a group of grantees with these relatively modest budgets.

Scope of the Evaluation. An independent cross-cutting evaluation of Phase I and II of the Archstone Elder Abuse & Neglect Initiative was conducted by The Measurement Group. In a cross-cutting evaluation, the emphasis is on the entire initiative, and not specifically on individual grantees. Consequently, the evaluation is designed to answer questions about the collective activities of the grantees, the outcomes of different kinds of program elements, and whether there are clear patterns of lessons learned and innovative programming that can be applied in future projects. Additionally, a cross-cutting, initiative-wide evaluation can answer questions about the overall value of the initiative in terms of its likely return in services, innovation, and long-term changes in policies and service systems in relationship to its approximate funding levels. The emphasis in a cross-cutting evaluation is on lessons that can be learned through the collective data from the entire set of relevant funded projects.

Evaluation Methods. The primary goal of this report is to determine the themes addressed by the projects in Phases I and II and their outcomes. Activities and outcomes studied include: a) those in the original proposals; b) ones added by grantees after funding was received; and c) those to be logically expected in human services projects. Primary evaluation data for Phases I and II were collected using quarterly report forms designed for this Initiative and include project-specific supplementary studies of statistics from individual grants. Additionally, interviews were conducted with all Project Directors and other key staff at the end of Phase I, and additional supplemental data was collected at the end of Phase II in December 2010. A copy of the generic evaluation template, formatted for this report, can be found in Appendix I.

Documents were analyzed using judgment-based and automated coding methods in NVIVO 8.0. Quantitative indicators were developed and equated across projects; statistics were calculated in SPSS 17.0. More than 120 key areas of programmatic activity were examined. A conceptual model for the coding of documents in this Initiative can be found in Appendix II.

Combination of Quantitative, Qualitative, and Judgment-Based Data. This evaluation uses quantitative indicators of program activity and quality (such as the number of trainings of mandated elder abuse conducted, the number of clients receiving a particular kind of services, and the number of clients with improved quality of life). This evaluation also uses qualitative indicators of program activity and quality (such as participant observations about which techniques worked or did not work – and why). The evaluation uses judgment-based indicators based on the 20-year history of The Measurement Group in evaluating 440 programs and five large initiatives and our ability to benchmark the current programs against those we have worked

with in the past. The conclusions drawn at the end of this report are based on the convergence of evidence from quantitative indicators, qualitative information, and professionally-based judgment.

PROJECT IMPLEMENTATION AND COLLECTIVE OUTCOMES

Implementation and Process in Projects. Although the Archstone Foundation funded the Elder Abuse & Neglect Initiative EANI projects within broad categories – Education and Training of Mandated Reporters of Elder Abuse, Financial Protection, Forensic Center and Center of Excellence Development, Legal Protection, Multidisciplinary Team Development, Long Term Care Ombudsman Services, Systems Analysis, and Convening and Technical Assistance – it was found that, as implemented, the projects did not fall into discrete groups. For instance, while four projects were funded to work on the education and training of mandated reporters, all projects actively engaged in conducting trainings. Similarly, 16 of the projects worked with local multidisciplinary teams in some capacity, although only six projects were formally funded to develop and lead multidisciplinary teams. While there were four Forensic Center projects, many of the programmatic elements of the Centers, including multidisciplinary diagnostic procedures and legal interventions, were part of the remaining projects in their comprehensive service system development efforts. Although only one project was specifically funded to work on issues related to financial protection, asset preservation was a focus in most projects. While two projects were funded to analyze large systems of services (the judicial system and County Adult Protective Services Departments), APS services and court referrals were part of many projects. One project was specifically funded to work on legal protection, but many of the projects offered legal assistance to clients. Only one project was funded to provide Long Term Care Ombudsman services, yet many projects work with their local ombudsman and other care providers. Finally, while the Convening Center was charged with fostering information sharing and collaboration as well as providing technical assistance, these functions also occurred between pairs of projects outside of the formal convening process. This Initiative followed a typical pattern for multi-grant human services initiatives in that the projects were more similar in their goals, objectives, and outcomes than formal funding categories would suggest.

Collective Outcomes. In Phases I and II, the 20 separate grants collectively produced at least 1,222 significant *unique*⁴ outcomes.⁵ Outcomes include establishing effective advisory boards and implementation teams; conducting meetings that produce improvements in agencies and service systems; developing effective training curricula; effectively training program staff, elders, and mandated reporters; disseminating information; screening elders and providing intensive assessments for those who meet the criteria for services; using multidisciplinary teams to effectively assess and triage cases; intervening to preserve financial assets and quality of life; and studying and changing large-scale systems of care. Outcomes are clustered into overlapping

⁴ The phrase “unique outcomes” refers to the outcomes of an individual project; more than one project may have produced similar outcomes. The estimate of 1,222 significant unique outcomes is the sum of the unique outcomes in each of the 20 projects.

⁵ Considering the fact that in many cases the same outcomes could be achieved each quarter of the funding period, an estimated 11,565 outcomes were observed, with many of these overlapping or repeating each quarter.

groups as shown in Figure 2 which gives the percentage of significant outcomes that are exemplars of each theme. Note that specific concrete examples of outcomes are given in this report immediately following this section. There is not a perfect one-to-one correspondence between the categories of outcomes given in this section and specific numbers in the later section because at least several of the categories are related to the more specific exemplars with these categories, in some cases, being precursor conditions for the specific examples.

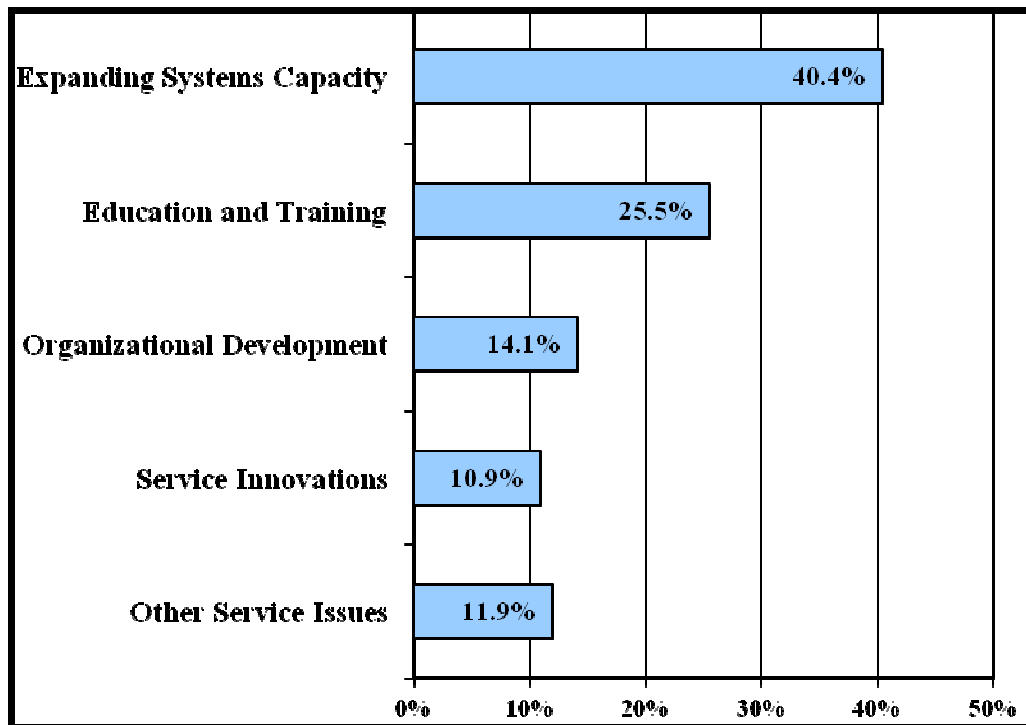


Figure 2. Percentage of Phase I Outcomes in Major Categories

- ✓ **Expanding Systems Capacity.** 40.4% of the outcomes were related to improving service systems by expanding the number and quality of professionals and organizations dealing with elder abuse and neglect and meeting mandated reporter requirements.
- ✓ **Education and Training.** 25.5% of the outcomes were related to education, training, and technical assistance efforts using strategies such as developing curricula, expanding the capacity to train mandated reporters of elder abuse and neglect, providing courses through classroom instruction and the Internet, working intensively with other professionals as consultants, and informing elders about financial abuse and strategies for avoiding predators.
- ✓ **Organizational Development.** 14.1% of the outcomes were related to strategies for directly improving the organizations that provide elder abuse and neglect services including using consultants, developing better organizational and budgetary controls, establishing quality improvement methods, involving key stakeholders and boards, and linking agencies.

- ✓ **Service Innovations.** 10.9% of the outcomes were related to improving services using best practices, incorporating cultural competence, empowering providers and clients, addressing service gaps, developing collaborations, and utilizing volunteers.
- ✓ **Other Service Issues.** 11.9% of the outcomes were methods for resolving problems and barriers, forming linkages, and using information from key clinical cases.

Phases I and II Selected Aggregate Specific Outcomes. Within each of the five major categories of outcomes that projects produced, specific types of outcomes were achieved. Selected exemplars of the collective quantitative outcomes achieved by the projects can be found below. Some of the specific quantitative outcomes fall within more than one of the five major types of outcomes listed earlier. Note that most projects are not designed or expected to produce more than several of these outcomes and no project is designed to produce all of them.

- **Infrastructure Development Meetings.** The 20 projects conducted or participated in a total of 8,619 meetings for infrastructure development, planning, or coordination (median⁶ = 364 meetings) to build a lasting capacity within California for services related to elder abuse and neglect prevention and intervention. Most of the infrastructure development activities consisted of identifying key local agencies and professionals to provide comprehensive, coordinated services, and then working with these agencies and professionals to develop seamless service networks. Figure 3 presents these results in graphic form.

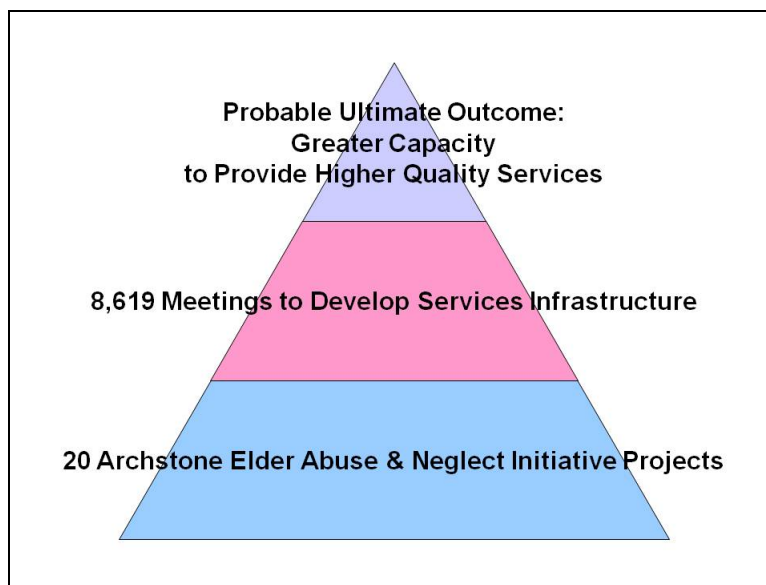


Figure 3. Infrastructure Development Activities by 20 Projects.

The infrastructure development activities of the grantees are significant. In most cases, the projects have used meetings to develop formal agreements among agencies to work on joint

⁶ All per project medians reported in this section do not include the projects with no activities (or 0 events). The medians are for the projects that had at least 1 activity (event).

programs to share cases, and the types of informal relationships with key stakeholders and other service providers that tend to make service networks comprehensive and seamless. The types of activities conducted by these projects should yield an infrastructure for elder abuse and neglect services that will continue far beyond the duration of the Archstone Foundation funding.

Trainings and Number Trained. Nineteen projects conducted a total of 1,270 trainings (median = 29 trainings) for mandated reporters (individuals who care for an older adult, including Adult Protective Services, law enforcement and other first responders, clergy, physicians and other health professionals, social service professionals, and financial institutions) of elder abuse and neglect. A total of 26,136 individuals (median = 508 people) received training. Note that while only four of the Archstone Elder Abuse & Neglect Initiative grantees are specifically identified as Education and Training Projects, virtually all of the projects conduct trainings as a key programmatic element used to expand service capacity and ensure that higher quality services are delivered by their collaborators. Three of the four Education and Training grants developed intensive trainings using detailed curriculum development methods. These curricula or curriculum enhancements represent the most intensive training efforts. Figure 4 presents these results in graphic form. The fact that more than 26,000 key service providers and gatekeepers within the health and social care systems were trained to at least identify the key signs and symptoms of elder abuse and neglect and to then make appropriate referrals or service linkages is important since such training should yield results far into the future.

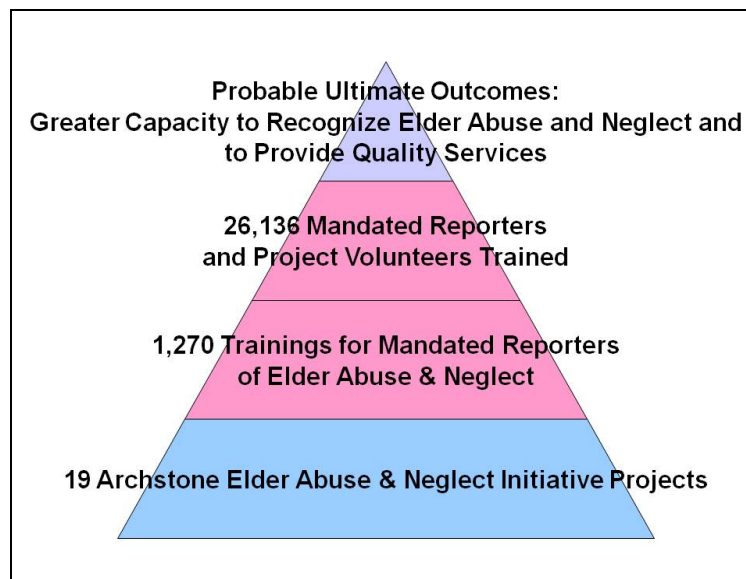


Figure 4. Training and Education Activities by 19 Projects.

Presentations and Attendance. Nineteen projects gave a total of 2,135 formal presentations (median = 41 presentations) to mandated reporters, staff members, other agencies, and the elderly. In total, 142,427 individuals (median = 1,345 people) attended presentations. Of the 2,135 presentations, 1,441 were moderate-intensity sessions for mandated reporters and elders made by 18 agencies, while the remaining 676 sessions were low-intensity sessions or health fairs for elders conducted by one project. Moderate-intensity sessions were attended by 72,550 individuals and the low-intensity sessions were attended by 69,471 individuals. Figure 5 presents these results graphically.

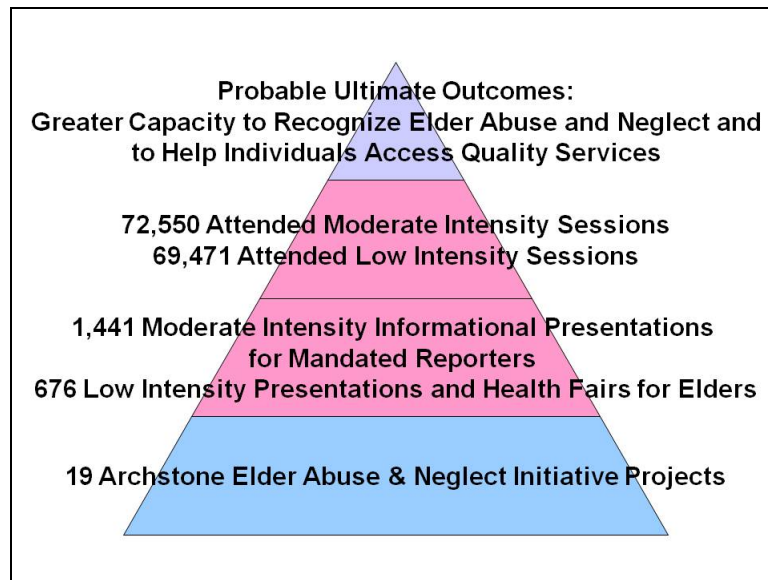


Figure 5. Informational Presentation Activities by 19 Projects.

Media Events. Nineteen projects participated in a total of 447 media events (median = 20 events). These events included interviews in the media (among them, the New York Times, the NBC Today show, USA Today, and many local newspapers and television stations), press releases, a DVD, a bus sign campaign in a major city, and flyers. The media events reached an estimated 12,152,400 individuals (median = 45,433 people). Figure 6 presents these results in graphic form.

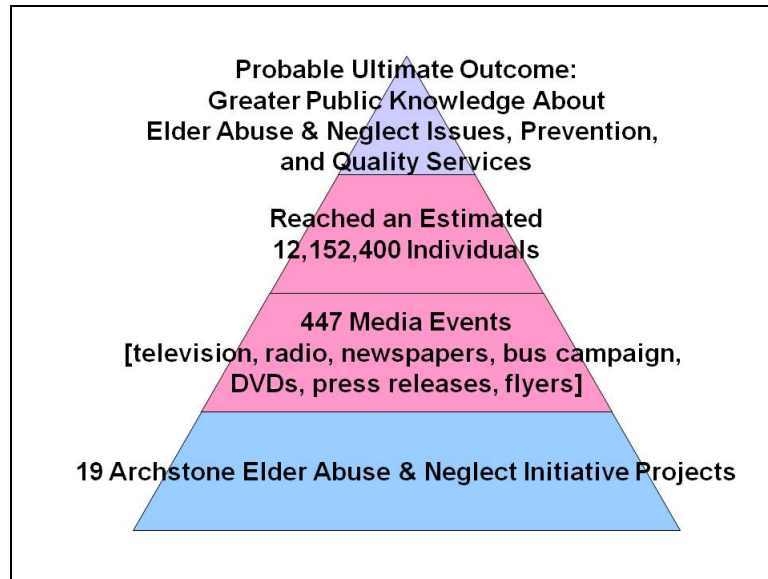


Figure 6. Media Events by 19 Projects.

Systems Change. Systems Change activities were conducted by two projects. One of the projects worked to standardize data collection efforts in Adult Protective Services departments throughout California. The project found that the 58 California counties utilize quite different assessment and record keeping methods. A significant outcome of this project is a Phase II project designed to promote standardized information collection about elder abuse and neglect cases. A second project studied the ways that the California courts resolve issues of alleged elder abuse and neglect. A significant outcome of this project is a Phase II project designed to train court officials in elder abuse case resolution methods. Figure 7 presents these results in graphic form.

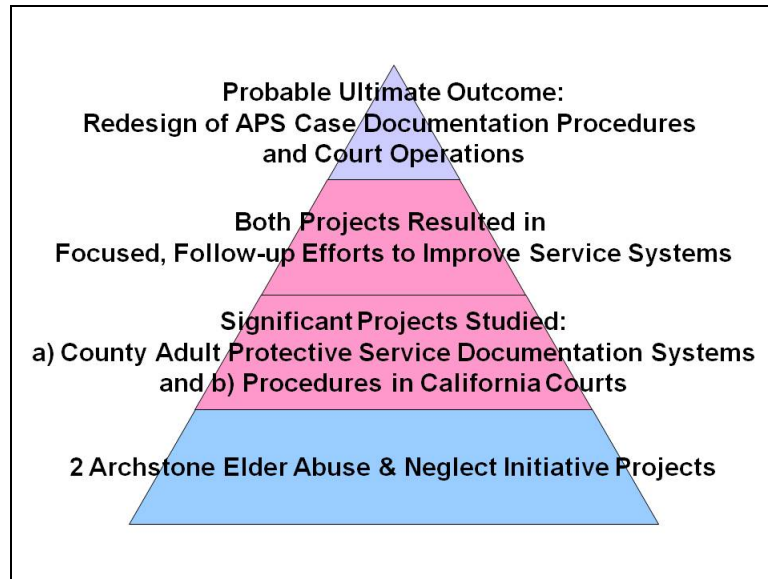


Figure 7. Systems Change Activities by 2 Projects.

It is important to note that the two Systems Change projects were explicitly designed to assess the need for a further implementation study and then to use the data collected during Phase I to develop an innovative model to address unmet needs. Both projects were successful in conducting needs assessments and in-depth analyses and were able to develop proposed projects that were judged significantly innovative and feasible to be selected for funding.

Convening Center and Grantee Collaboration/Synergy. Within this initiative of grants covering a full spectrum of development needs, a convening or coordinating center was also funded at the University of California, Irvine, to bring grantees together through periodic meetings and conference calls to share information, form collaborations, and minimize duplication of effort between similar projects. Importantly, convenings were designed so that grantees with different types of grants were brought together as a larger group, and types of projects could cross-fertilize projects of a different type. Within the convenings and through other means, all projects were given the opportunity to form collaborations with other projects to improve and streamline their own programs. To facilitate these efforts, the Convening and Technical Assistance Center conducted ten all-grantee meetings, and monthly all-grantee conference calls to promote communication and skills exchange. Figure 8 graphically depicts these activities.

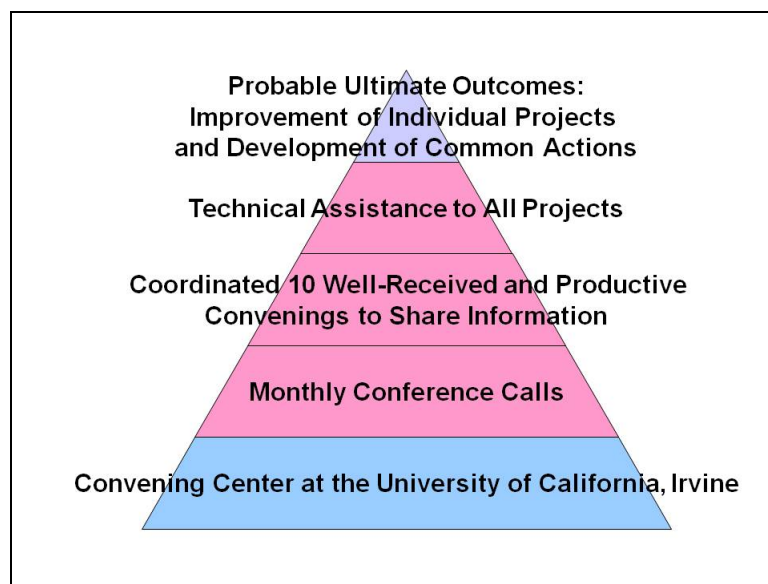


Figure 8. Convening Center Activities by the University of California, Irvine.

The independent evaluation found that both the meetings and the monthly conference calls were well-received. Participants consistently rated the quality of the convenings highly, indicating that they were highly relevant to their work, matched their expectations, provided useful resources and information, and provided an environment that was conducive to networking. Many attendees expressed that there was a high likelihood of using information from each of the convenings in their own work and they provided examples of how they planned to utilize the resources. Table 2 below provides selected exemplars of the grantees' comments about the convening process. The examples were taken directly from evaluation forms completed by the participants after each convening. A more detailed report about each of the convenings, their topics, and grantee feedback can be found in Appendix IV.

Table 2. EANI Grantee Responses from Convening Evaluations 2006-2010

Evaluation Question	Selected Exemplars of Grantee Responses
How will you use the information and resources provided at the Convening?	<ul style="list-style-type: none">• “There has been some hesitation among social agencies to adopt a ‘FAST/MDT’ program and the FAST has been stalled at past convenings. I can use the Archstone information to overcome their objections.”• “The ability to see the big picture (other projects) will help generate sustainability ideas for us.”• “Utilize other curricula to ensure our basic modules are compatible.”• “Several projects provided ideas for future projects in our area (specifically-A Clergy Outreach Project is in our future!).”• “Being able to see that the MDTs had common barriers and now to overcome them.”
How do you plan to build on the networking connections made at the Convening?	<ul style="list-style-type: none">• “I have a list now of people I can call on for information in legal, financial, and care management issues that I did not have before since I’m new in this field.”• “I am going to contact a couple of researchers here to brainstorm on our design.”• “I now know about more trainings that are offered and trainings that I may be able to attend.”• “Participate in sustainability planning with other forensic centers, including legislative advocacy to secure state funding.”
What do you feel is a success of these Convenings?	<ul style="list-style-type: none">• “Great conference. The positive attitudes and hope that we as a collective group can make a difference in the field of elder abuse is encouraging.”• “The Convenings have become more useful/engaging over time as projects are maturing and developing more resources.”• “Extremely valuable to have face-to-face time to work on materials, increase buy-in amongst stakeholders and network on initiatives.”• “These Convenings are invaluable for sharing ideas, problem-solving, social support, and future planning.”• “The Convenings were the heart of this initiative. Joining with others who shared our passion for elder justice and fairness was a constant reinforcement of our enthusiasm and focus. It’s difficult to quantify this synergy.”

As part of its activities, the Convening and Technical Assistance Center was charged with linking with each of the content projects, and providing technical assistance through the Convening Center or the Center of Excellence, both housed at the University of California, Irvine, and directed by Dr. Laura Mosqueda. We found that 16 of the 17 Archstone Elder Abuse & Neglect Initiative grantees (not including the three projects at the University of California, Irvine) were linked to the Convening Center or Center of Excellence.

Table 3 shows some of the types of linkages between the projects and the UCI Centers. Linkages to the Centers help the projects through technical support, training in a variety of professional skills, and enhancing communication structures.

Table 3. Selected Exemplars of Grantee Linkages to Convening Center.

- Provided assistance with the design, evaluation, and dissemination of an MDT Survey.
 - Provided photographs and links to online articles about bruising for an EMT training curriculum.
 - Facilitated the use of music for an elder abuse media campaign.
 - Helped to develop and select appropriate handouts for lay leaders for a training event.
 - Discussed the development of an APS training module.
 - Facilitated networking which garnered support for legislation that would restore funding to the Ombudsman Program.
 - Provided an agenda for trainings, information on free online care giver training modules, and a conference call line and meeting room for a FAST coordinator meeting.
 - Offered resources on its website, such as boilerplates for MDT meeting notes, client consents for treatment, and the manual on how to start up a Forensic Center.
 - Wrote a letter of support to supplement a project's application for an outside grant.
 - Facilitated access to an online library database for journal article research.
 - Assisted a project with the development of MOU's and discussing client confidentiality issues with its partner agencies.
 - Provided expanded networking capabilities and access to some of the top names in the field of elder abuse.
 - Assisted with a Senior Outreach work group.
-

Through the meetings and conference calls organized by the Convening Center, projects were encouraged to form strong linkages among one another to increase the effectiveness of their own activities. All nineteen of the content grantees (not including the Convening/Technical Assistance Center) formed relatively strong linkages with other projects; strong linkage was defined by having at least one close and continuing collaboration, including joint activities of a significant nature with another project or having less intense, information-sharing collaborations with at least three other projects. Table 4 shows a representative set of the collaborations.

Table 4. Selected Exemplars of Grantee Linkages to Other EANI Grantees.

- Sponsored a training hosted by another project.
 - Chaired an Advocacy Committee made up of other grantees and providing information about state legislation.
 - Partnered with another grantee to offer judicial officer trainings.
 - Received technical assistance about developing a poster presentation.
 - Mailed brochures to another project for their community health fair.
 - Provided foreclosure prevention advice and referrals to another grantee for one of their clients.
 - Attended the weekly client assessment meetings of another project.
 - Sought recommendations from a grantee about which journals to consider for manuscript submission.
 - Attended a day-long training hosted by another project about working with developmentally disabled victims.
 - Shared client cases with another project so that there would be enough cases to discuss in FAST meetings.
 - Contacted the staff of another project to discuss their training curriculum and resources for developing a new curriculum.
 - Participated in monthly conference calls with the other Forensic Centers to develop uniform goals, objectives, and data collection methods.
 - Worked with a grantee to develop elder abuse resources documents for judges.
 - Linked to another grantee with the similar goal of developing standardized training and practice procedures for California APS workers.
 - Organized a network of grantees to discuss future collaborations and strategies for sustainability.
 - Met with another project to plan a training sessions for seniors to teach them about speaking to their peers about elder abuse issues.
 - Utilized the same medical consultant as another grantee to provide input on curriculum development.
 - Assisted another project as they developed an elder death review team in their county.
 - Received regular technical assistance from another Multidisciplinary Team.
-

Volunteers. Eighteen projects recruited a total of 764 volunteers (median = 23 volunteers) and 629 actively participated (median = 20 volunteers). Volunteers are defined as professionals or community members providing professional, paraprofessional, or community services to the project. Figure 9 presents these results in graphic form.

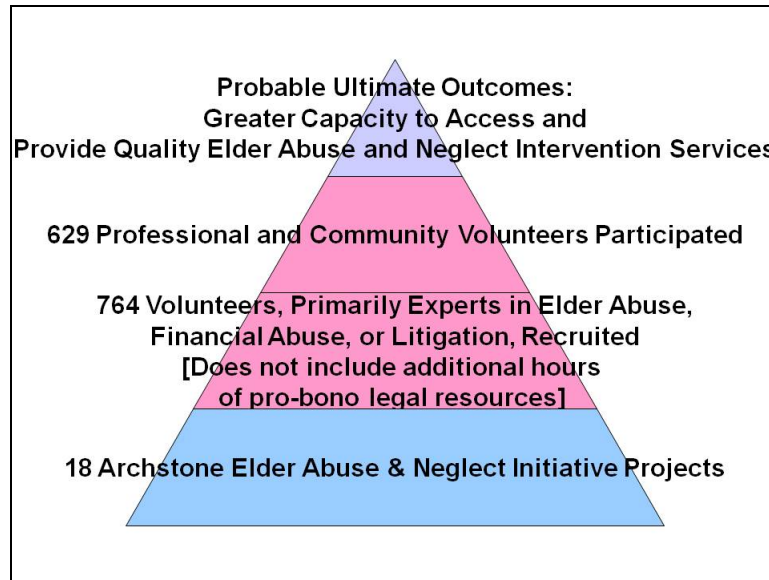


Figure 9. Utilization of Volunteers by 18 Projects.

Assessments. Fifteen projects conducted a total of 14,997 brief assessments or screenings (median = 444 assessments) designed to identify elders needing more intensive assessment. Most screenings or brief assessments ask a small number of questions, and individuals who may have been abused or neglected are selected for further assessment. Of these 14,997 brief assessments, there were 6,713 relatively brief diagnostic screening assessments by professionals and 8,284 very abbreviated screenings, often by questionnaire. Fourteen projects conducted a total of 1,630 formal and informal assessment meetings (median = 77 meetings) to discuss individual cases; in such meetings, several professionals decide whether to triage cases that screen positive for likely elder abuse or neglect for further assessment or specific services. Fourteen projects conducted a total of 4,494 intensive assessments (median = 225 assessments) of potential elder abuse victims. These high-intensity assessments consisted of using batteries of professionally-administered tests and/or interviews to document the individual's needs and deficits and develop an individual service plan. Some assessments have a value of \$1,000 or more per client if conducted in outside provider offices. Many of these assessments would not have been done without Archstone funding to either directly pay for the assessments or to support the staff who can obtain public funding reimbursement for the services. Figure 10 presents these results in graphic form.

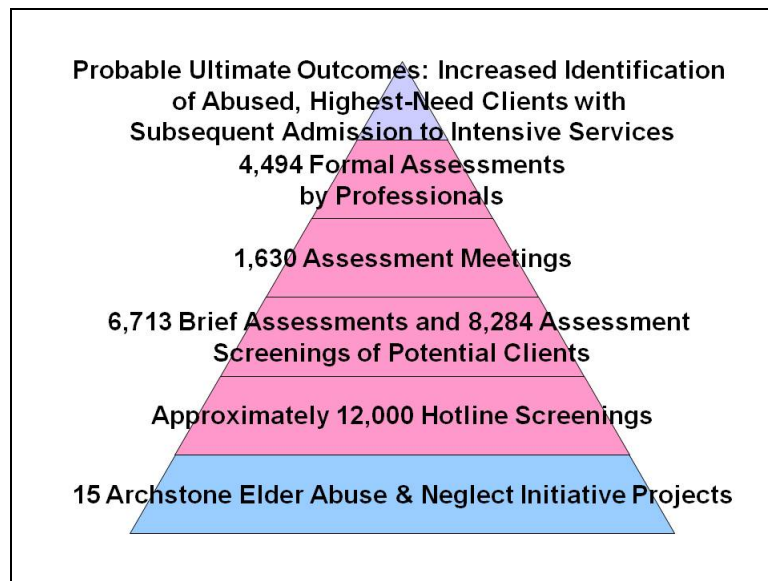


Figure 10. Screening, Brief, and Formal Assessments by 15 Projects.

Enhanced Services and Improved Quality of Life. Nineteen projects worked to help their partner agencies enhance services provided to victims of elder abuse; these projects worked with 233 affiliated agencies (median = 7 agencies). In aggregate, 4,751 clients (median = 224 clients) served by 15 Archstone-supported projects received enriched services in a more coordinated and comprehensive service delivery system. The evaluation data indicate that – as defined for the purpose of this evaluation – at least 560 elderly clients have demonstrated significant improvements in their quality of life resulting from the enriched care system. Some examples of improved quality life include clients who had abusive caregivers removed, financial assets or other resources preserved, better access to an appropriate mixture of services, and/or were removed from a substandard living environment and other conditions of neglect. Additionally, seventy-seven care facilities were found to be inadequate or unlicensed and were subsequently closed. It is estimated that 1,536 additional elders may have had their quality of life improved as they were relocated from these unlicensed facilities to be with family or moved to licensed care. From reading accounts of individual cases, it is clear that the services provided by the projects had far-reaching consequences for individual elders. It is almost unprecedented to find that projects with the modest budgets of these can produce such a large effect in the extremely important outcome of quality of life for within such a short period of time. Most clients would not have had such successful outcomes had the projects not existed. Figure 11 presents these results graphically.

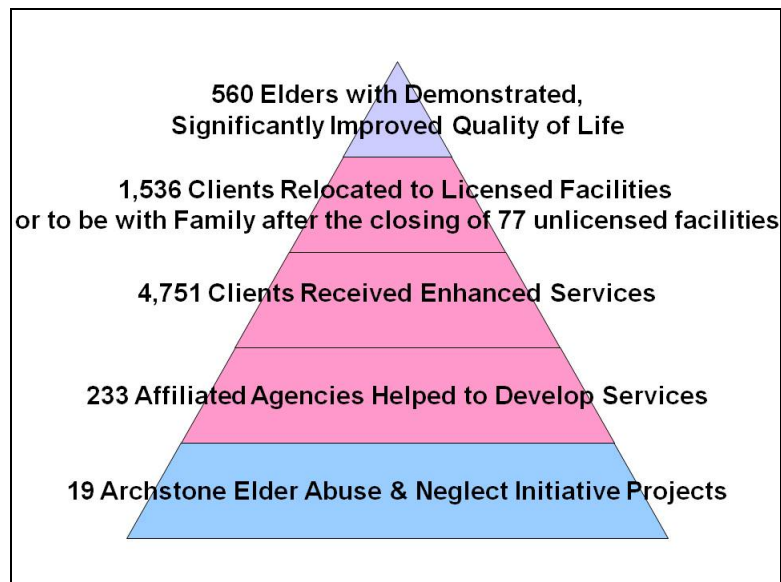


Figure 11. Enhanced Services by 19 Projects with Associated Improved Quality of Life.

District Attorney Filings. Seven projects worked with local law enforcement to file a total of 148 cases (median = 11 cases) with the District Attorney (DA). Of the 148 filings, 57 were successfully prosecuted and an unknown number are still in progress. It is our belief that the vast majority of these 148 filings would have not occurred, due either to the fact that the cases would not have come to the attention of law enforcement or that they would not have been diagnosed correctly, had the Archstone-supported projects not existed. Figure 12 presents these results in graphic form.

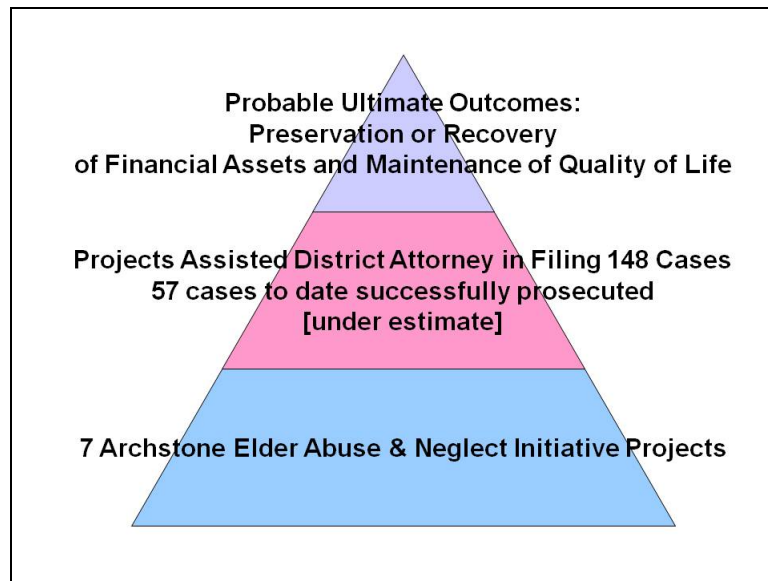


Figure 12. District Attorney Filings by 7 Projects.

Asset Preservation. Thirteen projects reported that they had preserved the financial assets of 193 clients using interventions funded by the Archstone Foundation; the total amount preserved was over \$50.9 million. Approximately \$7.40 in seniors' assets was preserved for each \$1.00 of Archstone Foundation funding that was expended through December 31, 2010. As was the case with the District Attorney filings discussed above, it is our belief that the vast majority of these assets would not have been preserved without the Archstone-funded projects, as almost all cases were new ones identified by the projects. Figure 13 presents these results in graphic form.

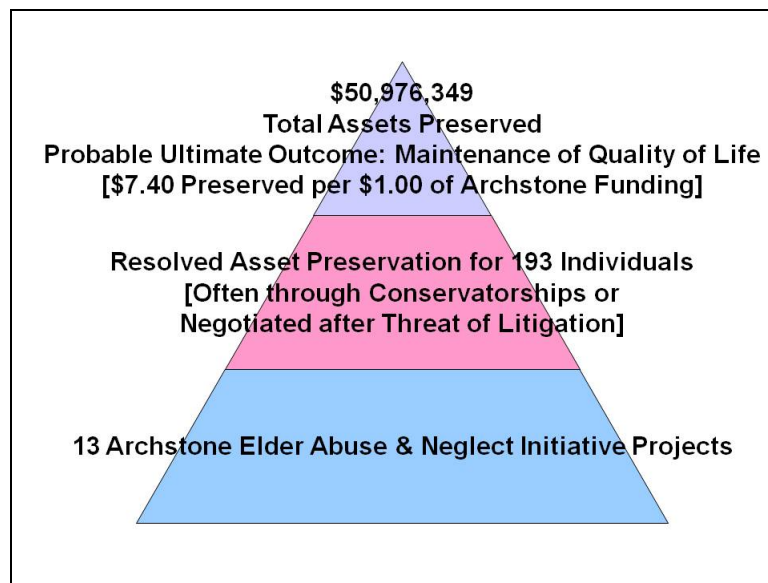


Figure 13. Asset Preservation Statistics from 13 Projects.

Leveraging. Nineteen projects leveraged more than \$13.2 million in additional grants and resources, due to the pilot work, staff support, and credibility derived from receiving Archstone funding. Note that approximately \$1.93 is generated by each \$1.00 of Archstone funding, resulting in approximately \$2.93 in resources being available for elder abuse and neglect programs for each dollar of Foundation money spent through December 31, 2010 on the entire 20-project Initiative. Figure 14 presents these results in graphic form.

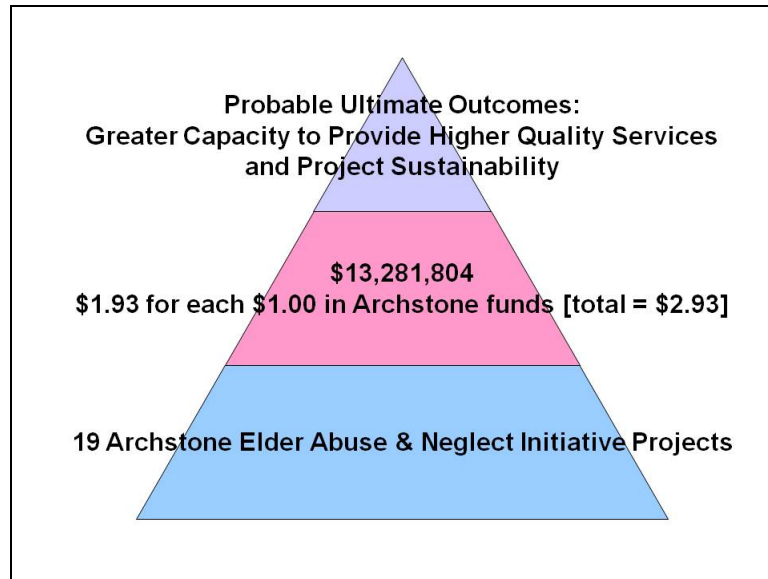


Figure 14. Leveraging Amounts from 19 Projects.

Early National and International Impact. Although all 20 projects are physically located in California and the scope of the Archstone Elder Abuse & Neglect Initiative was originally focused on impacting elders statewide, the successes and impact of the Initiative have already been felt at both a national and international level. Thirteen projects have provided technical assistance, training, informational presentations, or case consultations to professionals and agencies located in 40 other states and the District of Columbia as well as twelve foreign countries (Australia, Canada, Columbia, England, Israel, Japan, Mexico, Philippines, South Africa, South Korea, Sweden, and Switzerland). Figure 17 shows the states in which such linkages have been made and services have been provided. These initial efforts make it clear that there is a demand for dissemination of knowledge gained in this initiative from local, national, and international constituencies. Figures 15, 16, and 17 present these results in graphic form.

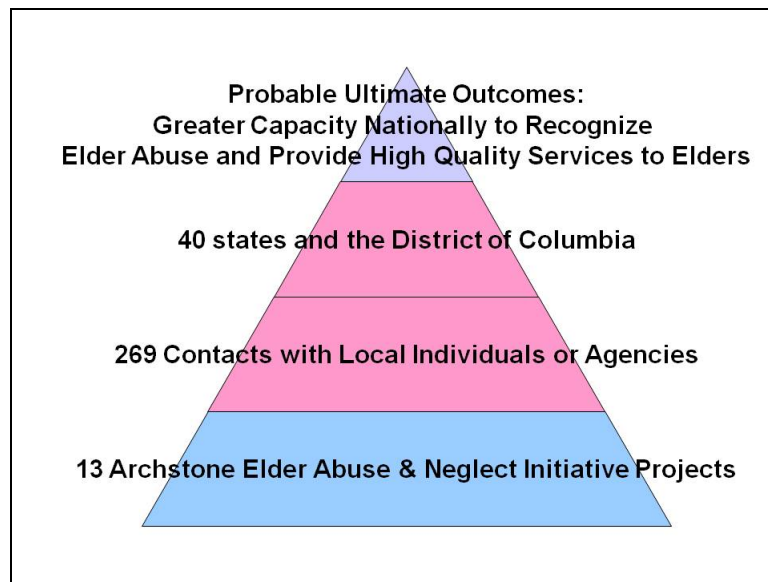


Figure 15. National Impact of the Archstone Elder Abuse & Neglect Initiative.

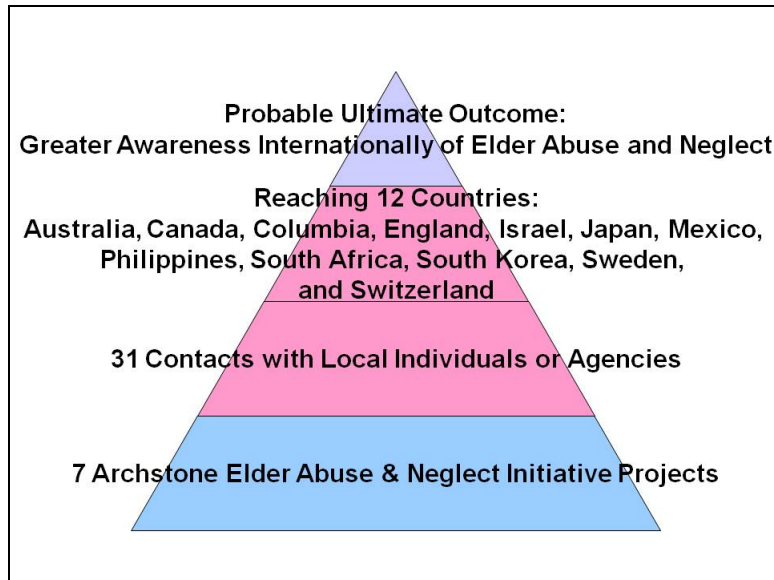


Figure 16. International Impact of the Archstone Elder Abuse & Neglect Initiative.

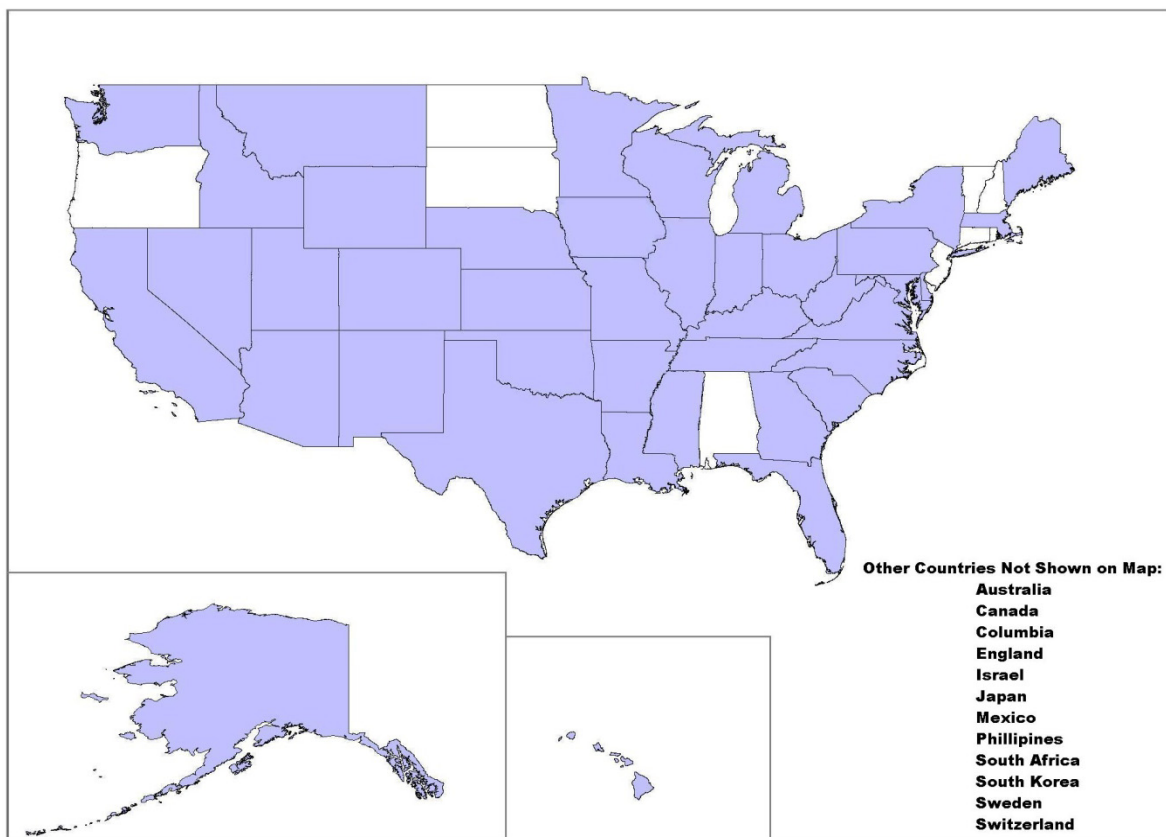


Figure 17. States Benefitting from Technical Assistance and Training Provided by Projects of the Elder Abuse & Neglect Initiative.

Cost-Effectiveness. As context for the evaluation results and lessons learned, the total expenses for the 20 Elder Abuse & Neglect Initiative projects over five years were \$6,885,416. The average amount spent in Phase I was \$178,938 (median two-year expense = \$107,921; the median expense is smaller than the mean expense because a few projects received relatively large awards compared to the majority of the other projects with more modest budgets). The average Phase II expense was \$183,227 (median three-year expense = \$158,688). We believe that the Elder Abuse & Neglect Initiative programs represent bargains, given their productivity, willingness to experiment with new models, and the outcomes they achieved almost immediately with modest funding levels. It is almost unprecedented to find projects with the modest budgets of these that can produce such large effects in the extremely important quality of life for their clients within such a short period of time.

GRANTEE PROGRESS AND CONTEXT

Journal of Elder Abuse & Neglect Special Issue. To share the work of the Initiative with a larger audience, the Archstone Foundation organized for the grantees to write a series of papers to be published in a special issue of the *Journal of Elder Abuse & Neglect*. Grantees formed groups based on the themes that connected their projects, as well issues that affect the larger elder service network. The *Journal of Elder Abuse & Neglect, Volume 22, Issues 3 & 4* included articles addressing topics such as the formation and operation of Forensic Centers, minimizing elder financial abuse, the role of clinicians and attorneys on interdisciplinary teams, methods for improving and sustaining service systems to older adults, and advocacy for elders. Also included were introductions from the Archstone Foundation, an evaluation report of grantee progress by The Measurement Group, and a future vision for elder abuse and neglect in America. Figures 18 and 19 show the cover of the Journal and its Table of Contents.

Each of the articles was a collaborative effort between individual project leaders, Archstone staff, and TMG staff. One thousand copies of the JEAN Special Issue were printed, and through the Archstone Foundation and grantees, disseminated across the nation. The articles are also available online for free, ensuring that the grantees can continue to spread the word about the Initiative.



Figure 18. Cover of the *Journal of Elder Abuse & Neglect*, Volume 22, Issues 3 & 4.

Journal of Elder Abuse & Neglect

Special Issue on: The Archstone Foundation Elder Abuse & Neglect Initiative

Guest Editors: Laura Mosqueda, Mary S. Twomey, Laura Giles, E. Thomas Brewer, George J. Huba, and Lisa A. Melchior

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Figure 19. Journal of Elder Abuse & Neglect, Volume 22, Issues 3 & 4: Table of Contents.

Headlines. In each quarterly evaluation report, projects are asked to provide a short newspaper headline about their activities and successes. Table 5 shows some of the representative headlines provided by the projects. The headlines are in the language of the projects with some editing by TMG staff for brevity. As may be seen in Table 5, the summary statement of the projects are highly informative and put context on some of the findings presented above.

Table 5. Selected Exemplars of Project Headlines.

-
- “Can a ½ unit course on elder abuse prevention increase student’s awareness of their role as mandated reports? [Project] says yes!”
 - “Study aims to implement effective court practices in handling cases of elder abuse.”
 - “As a result of [Project] intervention, 2 residents will not continue to endure financial, emotional, and verbal abuse and neglect from caregiver.”
 - “[Project] successfully held Community Forum to educate 120+ caregivers, seniors, and their families in recognizing the signs of elder abuse and neglect.”
 - “Over 100 attendees representing 57 different faith communities attended an Elder Abuse Summit.”
 - “EANI goes campus wide at Annual Research Conference on Aging.”
 - “Free Elder Abuse Training: Local law enforcements are being trained to identify and report elder abuse and neglect.”
 - “[Project] preserved and/or recovered over \$20 million dollars of vulnerable senior’s assets.”
 - “[Project] served over 250 litigants at its clinics, providing critical services to seniors, the disabled and their caregivers.”
 - “[Project] co-authored a report about reverse mortgages that reached a national audience and gained the ear of the Financial Protection Bureau and the Federal Reserve.”
 - “[Project] continued to distribute Spanish materials and delivered a Spanish presentation to residents of a senior apartment.”
 - “[Project] surmounts barriers to team formulation, launches recruitment effort for financial experts.”
 - “Increasing our community connections through education and collaborative meetings.”
 - “[Project] has developed a competent geriatric assessment team.”
 - “Organizations working together to prevent and battle elder abuse; working together to provide inspiration for a new life free from harm and full of peace.”
 - “[Project] continues to develop and deliver quality trainings.”
 - “[Project] continues to protect elder and dependent adult victims – 591 cases!”
 - “[Project’s] report reveals inconsistencies in APS procedures and provides blueprint for ameliorating them.”
-

Representative Project Successes. Table 6 presents a selected set of representative project successes. There is one example from each of the 20 projects, and very minor editing has been done to abbreviate individual observations and remove information that would identify individual grantees. The table is organized by project type to show the types of successes experienced by each group, according to their specific scope of work.

Table 6. Selected and Representative Project Successes.

Project Type	Selected Exemplars of Successes
Convening Center	<ul style="list-style-type: none"> • “The Center’s ongoing technical assistance is a highlight of this quarter. We continue to see an increase in the number of visits to our website, as well as the number of people contacting us with questions about our work.”
Financial Protection	<ul style="list-style-type: none"> • “An 85-year-old legally blind man with dementia was coaxed into signing loan documents he could not see or understand. [Our project] sued the lender and brokers in federal court... As a result of [litigation], the monthly payment was brought down from \$2,200 to \$1,800. Mr. C also received a settlement from one of the brokers totaling \$40,000. Mr. C now gets to stay in his home.”
Education and Training	<ul style="list-style-type: none"> • “The newly inspired lay leaders who form a core group for the new task force remain eager to stay involved in the project and carry it forward in their respective communities.” • “On-line training to 70 full-time and 30 part-time School of Dentistry faculty is in progress.” • “[We] made significant strides in ‘institutionalizing’ elder abuse by integrating elder abuse content into other [college] courses (e.g. ESL courses) and exploring opportunities for offering or requiring [the elder abuse course] in certificate and degree programs.” • “[Project] has joined with other Adult Protective Service agencies... to ensure that our trainings meet the highest standards.”
Legal Protection	<ul style="list-style-type: none"> • “We developed and maintained productive relationships with key personnel overseeing the Los Angeles County Court system which has proven to be a valuable resource for raising and resolving problems encountered by litigants as they occur, thereby extending the impact of the project beyond those litigants who availed themselves of our services.”
Long Term Care Ombudsman	<ul style="list-style-type: none"> • “Community Care Licensing has been working more collaboratively with the Ombudsman Program during unlicensed visits and investigation, as evidenced by their asking for Ombudsman input when making unlicensed facility determinations. This allows for a more resident centered examination of the evidence and ultimately determination [of resident outcomes].”

Table 6. Selected and Representative Project Successes.

Project Type	Selected Exemplars of Successes
System Analysis and Change	<ul style="list-style-type: none">• “The group is building on the findings of our Incidence Data Study to create a new work group that will work to improve consistency of APS data throughout the state.”• “The court now has the assistance of a senior peer counselor and mediator in place at elder court. In order to respond to the need for an interpreter, the court has partnered with Spanish Global Solutions who provides volunteer interpreters in the self-help clinic. These innovative, yet logical ways of assisting the elderly have grown to also include the DA’s office donating a wheelchair to assist elders from the parking lot to the courthouse, and donations of eyeglasses continue to come in.”
Forensic Center	<ul style="list-style-type: none">• “During this quarter, there has been an increased presence from the DA’s office. The increase in attendance and participation has been instrumental in helping get Forensic Center cases filed in court for prosecution.”• “The Forensic Center is most proud of the work it has done on 591 cases that have received intense, expert evaluation and attention. We feel that we are making a difference for the agencies that work in this field by giving them an avenue through which to have these cases evaluated.”• “A success that should be highlighted this reporting period is the fact that the team has been able to obtain permanent restraining orders for almost all of the clients that we have gone to court for... Not only are we able to represent clients—we are also able to do extensive court preparation for our clients so that they can be prepared for when they go to court. It is an essential that restraining orders are granted to enforce peace and protect the safety of our clients.”• “Police participation continued to be strong this quarter. [An inspector] from the Economic Crimes Unit, has been attending the Center weekly, even though our meetings are bi-weekly. There is new leadership in the Domestic Violence Unit and [the director] has become an enthusiastic participant.”

Table 6. Selected and Representative Project Successes.

Project Type	Selected Exemplars of Successes
Multidisciplinary Team	<ul style="list-style-type: none"> • “About 20 professionals from the [local] Congressional District who are interested in senior issues have joined the Regional Senior Services Collaboration Planning Team.” • “[We are] improving vulnerable seniors’ quality of life by expediting case resolutions and preserving assets. The team has preserved and/or recovered over \$20 million dollars of seniors assets.” • “Through a comprehensive collaborative team approach involving county, state and city agencies, a senior was placed in a secured environment, which saved her life.” • “A major success was collecting the southern and central California FAST teams for a revival of the statewide coalition!” • “[We] established a working geriatric assessment team capable of completing dependent adult and elder assessments in outpatient clinic.” • “The project has facilitated a new collaborative relationship among the District Attorney’s Office and the Sheriff’s Department, who are now actively contributing agencies on the team. This new collaborative relationship has resulted in increased service coordination for seniors.”

Lessons Learned. In any grant initiative, an important issue to document, in addition to the formal activities and outcomes of the projects, are the lessons learned by the projects. Lessons Learned usually include ways to implement the project; strategies for overcoming implementation problems; best practices for conducting services whether or not the project employed all of them; strategies for involving key stakeholders to optimize the outcomes of the project and its probability of sustainability; and perceived future directions for service development. Statements of Lessons Learned are an important outcome of any grants initiative, and the richness and complexity of the statements of Lessons Learned is, in part, an indicator of the overall success of the initiative.

Table 8 shows selected Lessons Learned by the Archstone Elder Abuse & Neglect Initiative grantees over the course of the project. While very minor editing has been done to abbreviate individual observations and remove materials that would identify individual grantees, the exemplars in Table 7 are, for the most part, direct quotations from project evaluation reports. To provide context on the quantitative indicators given above, the lessons learned comments have been grouped using the categories of quantitative indicators previously presented. The overall knowledge base that has been produced from these grantees represents the collective experiences of several hundred senior professionals over a two-year period. The knowledge base of Lessons Learned is elaborate, directly based on project activities and their outcomes, and should be of great use to other individuals and organizations who wish to replicate the programs developed under Archstone Foundation funding for this initiative.

Table 7. Selected Exemplars of Lessons Learned by Project Area.

Project Area	Selected Exemplars of Lessons Learned
Infrastructure Development	<ul style="list-style-type: none"> • “On site, co-located services facilitate relationship building among service providers and increases coordination of service delivery to victims.” • “Although not everyone is able to attend all the meetings, participation of core members remains strong. Requests for technical assistance from the team are also sent out via email and many team members ‘respond to all’ so that all can learn from and respond to the recommendations.” • “An efficient intake and case management system is absolutely essential in making the highest and best use of the resources expended in the clinic. This is especially true since a ‘first come, first served’ approach risks missing the opportunity to assist litigants coping with urgent situations...”
Formal Trainings for Mandated Reporters	<ul style="list-style-type: none"> • “The session also highlighted the need for flexibility to take advantage of opportunities for presenting information on aging and elder abuse to students on an informal or ad hoc basis and adapting instruction to the needs of diverse groups.” • “Future attempts to provide training to clinic faculty should include the provision of CE credit.”
Informational Presentations	<ul style="list-style-type: none"> • “De-stigmatizing elder abuse is a slow process that is difficult to measure. All training and education efforts are directed toward altering existing perceptions about elder abuse...ultimately altering behavior to better address the problem.”
Media Events	<ul style="list-style-type: none"> • “It was noted through comments of clergy advisors that the majority of clergy are not typically interested in elder issues. This was noted, and the flyer was designed to focus on the bridging of generations and the intergenerational benefits of helping elders.” • “The primary lesson learned from this objective is that both word of mouth and more widely distributed information in the form of project newsletters and training events are very worthwhile in ‘getting the word out’ about the project and the problem of elder abuse.”
Volunteers	<ul style="list-style-type: none"> • “We have learned that in the absence of a volunteer coordinator, future volunteer referrals will not increase.”
Brief Assessments	<ul style="list-style-type: none"> • “There continue to be residents who refuse to be interviewed by ombudsman and other members of the task force during unannounced complaint visits. Residents continue to appear fearful of talking... and more outreach needs to be done to calm some of their fears.”

Table 7. Selected Exemplars of Lessons Learned by Project Area.

Project Area	Selected Exemplars of Lessons Learned
Assessment Meetings	<ul style="list-style-type: none">• “Working in smaller groups leads to better group discussion and solution for cases. It was also found to be less intimidating and business gets taken care of in a supportive environment.”• “Even before a case has been resolved, case discussions prove to be highly educational for all consultants on specific situations of financial abuse as well as the different roles and knowledge of each consultant.”
Formal Assessments	<ul style="list-style-type: none">• “More emphasis [should be] placed on the forensic medical component of our wrap around model. There are specific times when a client and/or case is going to need certain specialized attention. It is necessary that we have someone on hand that can assist with these measures.”• “Additional services are needed for some victims even after the abuse has stopped due to law enforcement intervention. It would be helpful to the victims if an action plan is incorporated... [that includes] follow-up services.”• “The high demand for medical and neuropsychological evaluations...has been essential in conservatorship and prosecutions. Many financial abuse cases could not be prosecuted because they did not have resources for exams that were key for capacity issues.”
Agencies Developing Services	<ul style="list-style-type: none">• “It was also learned that participation of managers of service programs for victims not only helps to increase awareness of free services available, but can also expedite services—a small reminder of how valuable community connections can be to helping victims!”
Enhanced Services	<ul style="list-style-type: none">• “Although many of the seniors in the audience are already aware of common types of scams, the presentation provides a point of dialogue for elders. Elders are encouraged to spread information to friends and neighbors.”• “By continuing to submit group referrals to Adult Protective Services, [the project] was able to make more of an impact in protecting residents who were unaware of their rights due to limitations with capacity.”
Improved Quality of Life	<ul style="list-style-type: none">• “Core Team members have their participation in the Forensic Center justified and reaffirmed when they hear positive stories of prosecution outcomes or that a victim is thriving free of abuse or neglect.”
District Attorney Filings	<ul style="list-style-type: none">• “The project continues to communicate with the City Attorney’s Office to identify prosecutors that could participate more regularly... their participation and support of the project is critical.”

Table 7. Selected Exemplars of Lessons Learned by Project Area.

Project Area	Selected Exemplars of Lessons Learned
Asset Preservation Cases	<ul style="list-style-type: none">• “The cases discussed at the Forensic Center are often complex and varied. Therefore, the goals for each case are often different. Some cases aim to solely to achieve justice on behalf of the victim through prosecution while others require a broader, multi-faceted approach towards resolving the issues within the case. As one of our DA’s put it, it often takes more than a single goal such as prosecution to make a person ‘whole’ again and in linking our clients to these services, we believe we are moving closer towards a goal to improve our clients’ well-being.”
Leveraged Resources	<ul style="list-style-type: none">• “Through recruiting private firms [to donate legal hours], the project effectively multiplied its capacity to assist clients.”• “The grant was, in essence, the ‘tipping point’ that led our colleagues to think more about geriatrics.”

Top Grantee Achievements. At the end of each grant year, the 20 EANI grantees were asked to submit a Top Ten list which contained what they perceived as the top achievements for their project. The guidelines were intentionally left broad, so that each project could freely report what they deemed to be an achievement. Whether it was developing a curriculum that could potentially train hundreds of mandated reports across the nation or just ensuring that one elder was saved from financial abuse, the projects shared their most meaningful accomplishments. Table 8 contains some selected examples of these top achievements. The examples are taken directly from the words of the grantees, with minimal editing. The selections range from very specific to rather general examples, and are grouped by common themes.

Table 8. Top Achievements of the EANI Grantees

Community and Agency Involvement	<ul style="list-style-type: none"> • “Received several reports from clergy members to Adult Protective Services. These are the first ever reports of abuse from any clergy member to our county APS staff.” • “The [project] has noted a significant cohesiveness among the core team partners. This is apparent in team meetings, in informal discussions, and in formal presentations about elder abuse. A lack of this cohesiveness was one of the reasons the project was formed in 2006, thus it is a great success to see this accomplished.” • “While the grant objective was to increase the membership by adding a minimum of five additional disciplines per year, the project attracted 13 additional members. In addition, some of our anchor disciplines, like police, the D.A.’s office, and County Mental Health, continue to be member organizations and have sent new representatives to the monthly meetings.” • “The APS MDTs, countywide are being restructured to model after [this Archstone] MDT.” • “As an outcome of the Summit 2010 Meeting, two Catholic Parishes have created a paid position, Elder Care Coordinator.” • “As the result of [our] presentations, hospital staff started contacting the ombudsman program prior to placement to determine if a facility is licensed or not, preventing residents from being placed in unlicensed care.”
Public Outreach & Awareness	<ul style="list-style-type: none"> • “Staff updated the Project brochure to reflect current lending trends and printed 5,000.” • “Developed a court guide for seniors that provides instruction on how to use the court.” • “Updated a clergy website created in direct response to the project advisory board recommendation to have information available online.” • “An article published in <i>Aging Today</i> profiles the EAN project; it has an estimated circulation of 75,000 health and service professionals throughout the United States.”

Table 8. Top Achievements of the EANI Grantees

	<ul style="list-style-type: none">• “The Center’s website received 39,400 new visitors in 2009, an average of over 3,200 new visitors per month. The site now includes podcasts, videos of elder abuse trainings and links to helpful resources.”• “Distributed over 4000 brochures on elder abuse and neglect with a continued high request for more brochures.”
Client Outcomes	<ul style="list-style-type: none">• “The team’s interventions assisted in preserving and recovering over \$20,300,000 million dollars of vulnerable seniors’ assets to date.”• “We opened case files and provided extensive services to 1,143 new self-represented litigants at our four clinics by leveraging the talents of our two assigned staff members and many volunteers. We also provided assistance to several hundred other individuals who came to our clinics (e.g., referrals, brief advice, etc.).”• “The [project] has conducted a total of 269 medical and neuropsychological evaluations for various clients. The great majority of these evaluations are in-home evaluations and testing, but some are medical records reviews to forensically determine capacity and opine on issues such as neglect. These evaluations have resulted in a number of conservatorships through the Office of the Public Guardian and criminal filings through the District Attorney’s office.”• “The [project] collaborated with the County Tax Collector to identify senior and disabled adults who are delinquent in paying property taxes and referring them to legitimate aid organizations before their property is listed in public notices and predatory lenders or unscrupulous investors proposition them.”
Infrastructure Development	<ul style="list-style-type: none">• “The Advisory group has created a new glossary for use with the SOC 242. It contains commonly used terms and will guide a new generation of APS staff in filling out the SOC 242.”• “Developed first-ever Elder Abuse Prevention curriculum for Health Care Interpreters and Community Health Workers.”• “Institutionalized EAN in the Growth & Development track of the academic curriculum.”• “The Forensic Center worked with the other Forensic Centers to finalize a standardized intake/referral form. The Centers all worked very hard on this form for several months and are pleased to see each of the Centers collecting the same data.”• “Made significant strides in ‘institutionalizing’ elder abuse prevention curriculum at our academic institution by integrating elder abuse content into other courses and certificate programs.”

Table 8. Top Achievements of the EANI Grantees

Educational Presentations & Trainings	<ul style="list-style-type: none">• “The prevention wheels keep on turning each day as team members hit the road each day distributing elder abuse prevention materials and information throughout the community, making over 70,000 outreach contacts over the past three years.”• “The International Elder Abuse Conference held on February 11-12, 2008 was attended by over 200 people. Among respondents to the survey administered at the conference, 97% said the overall conference was Good, Very Good or Excellent.”• “We successfully provided trainings to the general public and mandated reporters for almost 1,000 individuals in approximately 40 separate trainings. Participant feedback on the trainings is universally positive with approximately 95% indicating that the quality of the training is either ‘excellent’ or ‘very good’ and most indicating that they will be more likely to report abuse as a result of the training.”• “This year, team members reported having reached 7,258 individuals through trainings and presentations. Numerous others were reached through media outlets, including print, radio and television. Several new cases were referred to us as a result of these presentations. We are thrilled that our team is enthusiastic in sharing their knowledge with the public and other professionals.”• “[We are] building awareness and increasing knowledge through education. At each monthly meeting, a guest speaker gives a presentation on areas of expertise in order to cross-train consultants. We have hosted 36 speakers over the past three years.”• “The Center’s Elder Abuse Training Institute trained over 3,000 professionals from a variety of disciplines including medicine, coroners, social work, law, and law enforcement.”• “Trained 200 3rd and 4th year dental students on administering EAN screening questions and the protocol to report suspected EAN.”• “Three hundred and forty-two hospital staff members and other placement agency staff are now empowered to be more effective advocates for their patients/clients to return to their facility of origin as a result of trainings offered by this project.”
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Grantee Feedback about the Archstone Foundation. The Foundation was perceived with great gratitude by all grantees. Among the successes perceived by grantees were the general project management style of the Foundation staff and the respect that the grantees felt accorded as professionals, the fact that the Board and staff of the Foundation were willing to make one of the earliest commitments to elder abuse and neglect services, the fact that creative program designs were encouraged, and the ways in which grantees perceived that the activities supported by Archstone Foundation funding had helped increase the capacity of their agencies to continue

similar services after the completion of Archstone funding. In our judgment, the compliments paid to the Foundation were sincere and deeply held. It was striking that there were no substantive complaints by any grantee about the level of funding, and while most project directors stated that they could design more elaborate and comprehensive projects at higher funding levels, they agreed that the levels of funding matched their work plans.

CONCLUSIONS AND RECOMMENDATIONS

We have drawn the following conclusions and make the following recommendations as the independent evaluators of this Initiative. These conclusions and recommendations were made without staff input or review. Our conclusions follow.

- The projects of this Initiative are collectively exceptionally productive. Service activity levels are high given the funding levels. We attribute this productivity to a number of factors, including the fact that there has been a pent-up demand for funding for program development in this area resulting in the extreme interest by professionals in what might otherwise be deemed modestly funded grants. The productivity was sustained through all years of the project.
- Significant innovation is being produced. Major training curricula have been developed, large numbers of mandated reporters have been trained, permanent infrastructure has been developed, and the quality of life of many older adults has been improved through innovative services. We believe that the innovation will be continued in the future.
- Individual projects were managed in efficient and thoughtful ways by the project staff; Foundation staff maximized project performance; and the mechanism of periodic project convenings and conference calls has strongly encouraged the cross-fertilization of ideas and successful methods among the projects. One of the major strengths of the Initiative has been the extremely productive group collaborative and consensus process. Having participated (as either the Convenor or as a grantee) in more than 20 such processes, this was the most successful one we have seen.
- In our judgment, the Archstone Elder Abuse & Neglect Initiative has produced a number of prototypes that can be considered national demonstration models. Among the models that we believe should be heavily promoted in California and across the nation are the Forensic Centers, the development of a Center of Excellence, small county models for impacting forming coalitions and making strategic interventions, the importance of mandated reporters and methods for training them to recognize and report elder abuse, and the special importance of including clergy as reporters when elder abuse is suspected. A number of these models and others have been highlighted in a Special Issue of the *Journal of Elder Abuse and Neglect* published in September 2010.

- Overall we attribute the cost-effectiveness of the Elder Abuse & Neglect Initiative Projects to three factors: 1) this area has historically received little funding and, hence, there is great demand for funds and services; 2) the Foundation selected highly motivated projects; and 3) these programs have been managed effectively, allowing projects to use innovative methods without burdensome administrative requirements. While it is not clear whether later implementations of the same models would be as cost-effective as administrative overhead is added by some academic institutions, it is clear that even if later implementations of the same models were somewhat less cost-effective, they would still be considered to be very high-return models.
- The funds made available by the Archstone Foundation were used very strategically and the design of the overall Elder Abuse & Neglect Initiative was extremely effective. It is striking that so much was done on so little and that the infusion of the Archstone funds served to mobilize professionals who were already highly committed to this process. Even more importantly, the innovative Archstone projects did bring many new participants into the service provider network and showed County departments and individual providers how their efforts could be multiplied in Centers and coalitions.
- The Archstone Foundation Elder Abuse & Neglect Initiative has already sustained its impact beyond the original project period. Several of the work groups formed as part of the Initiative are continuing their individual and collective efforts, even though the funding from their Archstone Foundation EANI grant has ended. The Archstone Foundation's decision to provide ongoing support to the University of California, Irvine Convening and Technical Assistance Center is helping to sustain the momentum of the work started during the five-years of the Elder Abuse & Neglect Initiative.
- We conclude that funding these projects as an Initiative was an effective mechanism for generating model programs for Elder Abuse & Neglect, and in creating synergy among programs throughout California (and beyond) to successfully accomplish this aim. The Convenings were an especially important aspect of the Initiative that promoted networking and working towards shared goals.

To reiterate, the Archstone Foundation Elder Abuse and Neglect Initiative included exceptional projects that were highly motivated to succeed, took appropriate steps in implementation, and should be seen as a significant contribution to the larger field interested in intervening with and preventing elder abuse and neglect nationally.

- The funding provided by the Archstone Foundation has produced a number of service models that should be continued and replicated in California as well as a large number of direct services. The work done has made a significant difference in how elder abuse and neglect is prevented, recognized, and treated and directly benefits the people of California. Significant models were developed for County collaboratives of agencies and individual providers. Significant models were developed for training mandated reporters. Significant infrastructure was developed.
- The funding provided by the Archstone Foundation has produced a number of service models that should be initiated and replicated throughout the United States.

Appendices

Appendix I	Generic Evaluation Template
Appendix II	Conceptual Model for Coding Archstone Elder Abuse & Neglect Initiative Evaluation Documents
Appendix III	Coding Scheme
Appendix IV	Cumulative Convening Evaluation Report

APPENDIX I: Generic Evaluation Template

The following report template has been modified to give an example of how the grantees reported on their goals and objectives for this Initiative. The report template was customized to each individual project, allowing for as many goals and objectives as proposed by the project.

Archstone Foundation Elder Abuse & Neglect Initiative Cross-Cutting Evaluation by The Measurement Group

Evaluation Report Template

GOAL 1: Type Goal 1 here. **:END OF GOAL 1 FIELD**

OBJECTIVE 1A: Type the first measurable objective for this goal here. **:END OF OBJECTIVE 1A FIELD**

ACTIVITIES TO MEET OBJECTIVE 1A DURING THIS PERIOD: List all activities conducted to meet this objective during this reporting period. For each activity note if it is continuing from a prior reporting period or new. Be as quantitative as possible. Give specific dates, number of clients served, number of other agencies participating, etc. **:END OF ACTIVITIES 1A FIELD**

ANY OUTCOMES OBSERVED FROM CONDUCTING THESE ACTIVITIES: List any outcomes that have been observed from conducting these activities or related ones at earlier times. **:END OF OUTCOMES 1A FIELD**

DATA FROM WHICH OUTCOMES ARE OBSERVED: List the data sources from which you observed or infer that outcomes from your activities have occurred (examples: focus groups, surveys, activity indicators, client outcome information, questionnaires, and interviews). Note the specific ways that the data were collected and the number of participants. **:END OF OUTCOMES DATA 1A FIELD**

LESSONS LEARNED, CONCLUSIONS, AND PROPOSED NEXT STEPS AFTER CONDUCTING THESE ACTIVITIES: List any lessons learned from the conducting the activities to meet this objective during this reporting period along with conclusions drawn and proposed next steps. If a lesson was presented in a prior report but modified here based on recent experiences, please note that. **:END OF LESSONS LEARNED 1A FIELD**

PROPOSED CHANGES TO THE OBJECTIVE: If you would like to change the objective, please state the proposed change and the rationale for the change. All changes must be approved by the Archstone Foundation. **:END OF OBJECTIVE 1A CHANGE FIELD**

OBJECTIVE 1B: Type the second measurable objective for this goal here. **:END OF OBJECTIVE 1B FIELD**

ACTIVITIES TO MEET OBJECTIVE 1B DURING THIS PERIOD: List all activities conducted to meet this objective during this reporting period. For each activity note if it is continuing from a prior reporting period or new. Be as quantitative as possible. Give specific dates, number of clients served, number of other agencies participating, etc. **:END OF ACTIVITIES 1B FIELD**

ANY OUTCOMES OBSERVED FROM CONDUCTING THESE ACTIVITIES: List any outcomes that have been observed from conducting these activities or related ones at earlier times. **:END OF OUTCOMES 1B FIELD**

DATA FROM WHICH OUTCOMES ARE OBSERVED: List the data sources from which you observed or infer that outcomes from your activities have occurred (examples: focus

groups, surveys, activity indicators, client outcome information, questionnaires, and interviews). Note the specific ways that the data were collected and the number of participants. **:END OF OUTCOMES DATA 1B FIELD**

LESSONS LEARNED, CONCLUSIONS, AND PROPOSED NEXT STEPS AFTER CONDUCTING THESE ACTIVITIES: List any lessons learned from the conducting the activities to meet this objective during this reporting period along with conclusions drawn and proposed next steps. If a lesson was presented in a prior report but modified here based on recent experiences, please note that. **:END OF LESSONS LEARNED 1B FIELD**

PROPOSED CHANGES TO THE OBJECTIVE: If you would like to change the objective, please state the proposed change and the rationale for the change. All changes must be approved by the Archstone Foundation. **:END OF OBJECTIVE 1B CHANGE FIELD**

GOAL 2: Type Goal 2 here. **:END OF GOAL 2 FIELD**

OBJECTIVE 2A: Type the first measurable objective for this goal here. **:END OF OBJECTIVE 2A FIELD**

ACTIVITIES TO MEET OBJECTIVE 2A DURING THIS PERIOD: List all activities conducted to meet this objective during this reporting period. For each activity note if it is continuing from a prior reporting period or new. Be as quantitative as possible. Give specific dates, number of clients served, number of other agencies participating, etc. **:END OF ACTIVITIES 2A FIELD**

ANY OUTCOMES OBSERVED FROM CONDUCTING THESE ACTIVITIES: List any outcomes that have been observed from conducting these activities or related ones at earlier times. **:END OF OUTCOMES 2A FIELD**

DATA FROM WHICH OUTCOMES ARE OBSERVED: List the data sources from which you observed or infer that outcomes from your activities have occurred (examples: focus groups, surveys, activity indicators, client outcome information, questionnaires, and interviews). Note the specific ways that the data were collected and the number of participants. **:END OF OUTCOMES DATA 2A FIELD**

LESSONS LEARNED, CONCLUSIONS, AND PROPOSED NEXT STEPS AFTER CONDUCTING THESE ACTIVITIES: List any lessons learned from the conducting the activities to meet this objective during this reporting period along with conclusions drawn and proposed next steps. If a lesson was presented in a prior report but modified here based on recent experiences, please note that. **:END OF LESSONS LEARNED 2A FIELD**

PROPOSED CHANGES TO THE OBJECTIVE: If you would like to change the objective, please state the proposed change and the rationale for the change. All changes must be approved by the Archstone Foundation. **:END OF OBJECTIVE 2A CHANGE FIELD**

OBJECTIVE 2B: Type the second measurable objective for this goal here. **:END OF OBJECTIVE 2B FIELD**

ACTIVITIES TO MEET OBJECTIVE 2B DURING THIS PERIOD: List all activities conducted to meet this objective during this reporting period. For each activity note if it is continuing from a prior reporting period or new. Be as quantitative as possible. Give

specific dates, number of clients served, number of other agencies participating, etc.

:END OF ACTIVITIES 2B FIELD

ANY OUTCOMES OBSERVED FROM CONDUCTING THESE ACTIVITIES: List any outcomes that have been observed from conducting these activities or related ones at earlier times. **:END OF OUTCOMES 2B FIELD**

DATA FROM WHICH OUTCOMES ARE OBSERVED: List the data sources from which you observed or infer that outcomes from your activities have occurred (examples: focus groups, surveys, activity indicators, client outcome information, questionnaires, and interviews). Note the specific ways that the data were collected and the number of participants. **:END OF OUTCOMES DATA 2B FIELD**

LESSONS LEARNED, CONCLUSIONS, AND PROPOSED NEXT STEPS AFTER CONDUCTING THESE ACTIVITIES: List any lessons learned from the conducting the activities to meet this objective during this reporting period along with conclusions drawn and proposed next steps. If a lesson was presented in a prior report but modified here based on recent experiences, please note that. **:END OF LESSONS LEARNED 2B FIELD**

PROPOSED CHANGES TO THE OBJECTIVE: If you would like to change the objective, please state the proposed change and the rationale for the change. All changes must be approved by the Archstone Foundation. **:END OF OBJECTIVE 2B CHANGE FIELD**

OTHER ACTIVITIES CONDUCTED BY THE PROJECT THAT DO NOT ADDRESS A SPECIFIC GOAL—OBJECTIVE. Other project activities that do not specifically address a specific goal and objective. Please list a comprehensive set of these activities. Note if each activity is New or Continuing from a prior reporting period. **:END OF OTHER ACTIVITY FIELD**

LIST UP TO FIVE OF THE GREATEST SUCCESSES OF THE PROJECT TO DATE. SUCCESSES MAY INCLUDE THE CONSEQUENCES OF ACTIVITIES THAT WERE NOT CONDUCTED TO ADDRESS A SPECIFIC GOAL—OBJECTIVE.

LIST UP TO FIVE OF THE GREATEST BARRIERS OR PROBLEMS ENCOUNTERED BY THE PROJECT TO DATE.

LINKAGES TO CONVENING CENTER: Describe the linkages you have to the Convening Center. What are the value of these linkages? Any problems? Give specific examples or estimates of the value of the Convening Center to your project. Describe any experiences you have had with their technical assistance efforts during this period, and the ways that any current or prior technical assistance may have impacted upon your project. **:END OF LINKAGE FIELD**

LINKAGES TO OTHER ARCHSTONE PROJECTS: Describe the linkages you have to other Archstone Elder Abuse & Neglect Projects (excluding the Convening Center). What are the value of these linkages? Any problems? **:END OF LINKAGE FIELD**

LEVERAGED FUNDS OR RESOURCES: Describe additional grants or other funds or other tangible resources like staff support, space, materials, etc., that you have obtained (if any) because your project has received Archstone Foundation funds. For any subsequent source of support you have received, please estimate the likelihood of you would have received the resources if you had not had the Archstone funding using a scale from 0% likely (would not have received the funds without the Archstone grant) to 100% likely (would have received the funds if the Archstone grant had not been made). **:END OF LEVERAGING FIELD**

MOST IMPORTANT OR KEY ACTIVITY: Write a brief description of the most important activity conducted or event or program conducted by your project in this reporting period. Briefly explain why this was a key activity. **:END KEY ACTIVITY FIELD**

PAPERS PUBLISHED ON THIS PROJECT DURING THIS PERIOD: List any papers that your project has published or had accepted for publication during this period. Please give a full publication citation for each paper. **:END PAPERS FIELD**

PRESENTATIONS MADE ABOUT THIS PROJECT DURING THIS PERIOD: List any meeting presentations your project has made during this period. Please give a full citation for each presentation. **:END PRESENTATIONS FIELD**

KEY TECHNICAL ASSISTANCE EFFORTS MADE TO OTHERS DURING THIS PERIOD: List any significant technical assistance efforts your project has made to further the efforts of another organization or professional whether funded by the Archstone Foundation or not. Please describe the type of technical assistance, to whom it was provided, and approximately how much time and other resources you invested in the assistance. **:END TA FIELD**

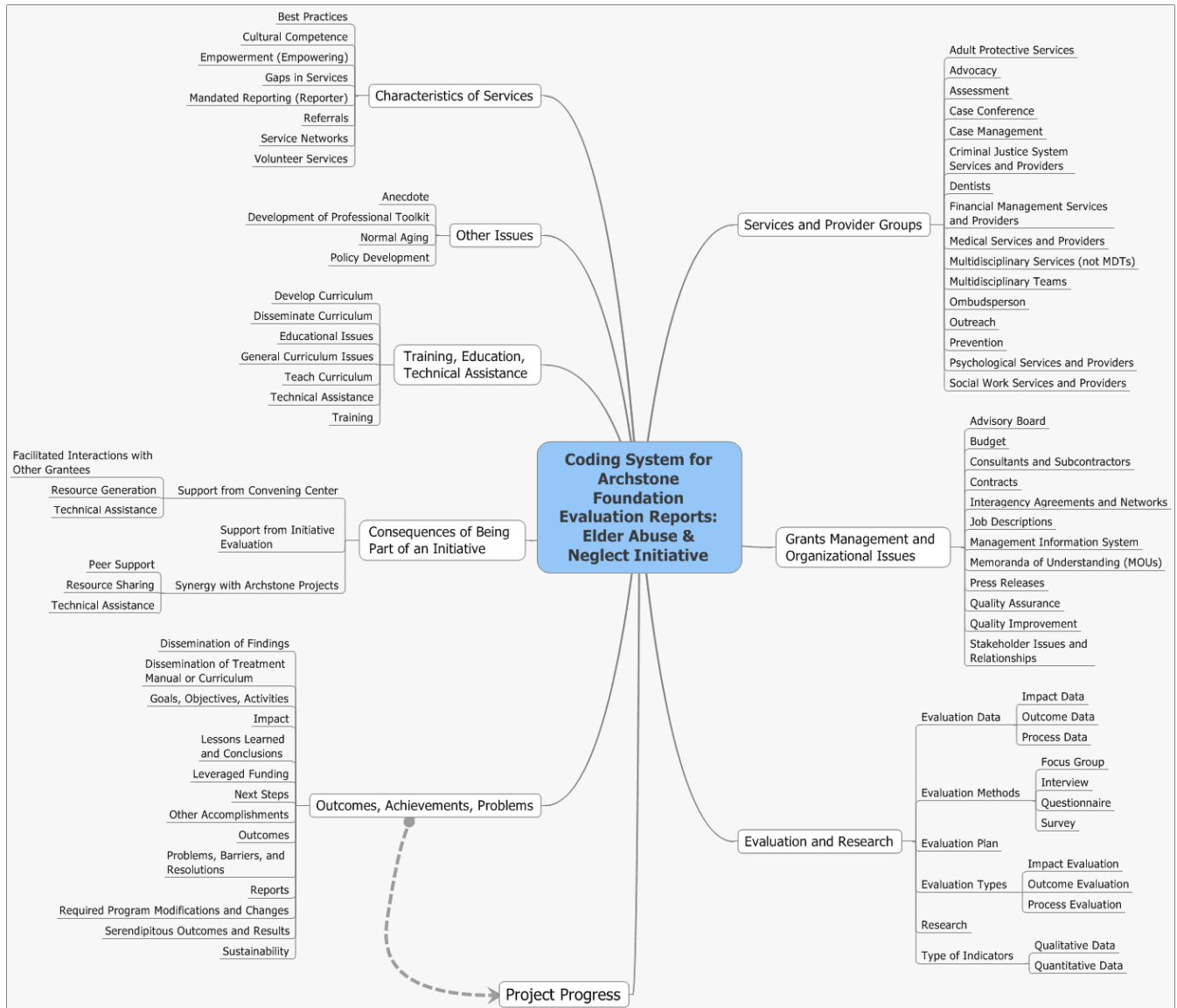
KEY LINKAGES MADE TO OTHER ORGANIZATIONS OR INDIVIDUALS DURING THIS PERIOD: List any significant professional, service, or collaborative linkages your project has made or strengthened during this reporting period. Describe the type of linkage, with whom it was made, and the significance of the linkage in terms of how it might affect your project and the other entity. **:END LINKAGES FIELD**

DISCUSSIONS DURING THIS PERIOD WITH THE ARCHSTONE FOUNDATION ABOUT BUDGET: Describe any budget discussions you have had with the Archstone Foundation during this reporting period. **:END OF BUDGET FIELD**

ANECDOTES: Provide any brief stories or anecdotes that illustrate the activities or outcomes of your project if such stories would tend to illustrate the nature or importance of your services. Make such stories specific but brief. **:END OF ANECDOTES FIELD**

HEADLINE: Write a "headline" of 25 words or less that describes the activities and progress of your project during this reporting period. **:END OF HEADLINE FIELD**

APPENDIX II: Conceptual Model for Coding Archstone Elder Abuse & Neglect Initiative Evaluation Documents



APPENDIX III: Coding Scheme

The following coding categories (nodes) were used to analyze the quarterly and year-end evaluation reports:

- | | |
|---|---|
| <ol style="list-style-type: none"> 1. Unique Successes 2. Unique Outcomes 3. Unique Lessons Learned 4. Unique Activities 5. Quarter 1 and 2 6. Quarter 3 7. Quarter 4 8. Quarter 5 9. Quarter 6 10. Quarter 7 11. Quarter 8 12. Year 1 Final Report 13. Year 2 Final Report 14. Quantitative 15. Most Recent Quarter 16. Case Study 17. Attachments 18. Additional Funds 19. Characteristics of Services <ol style="list-style-type: none"> a. Best Practice b. Cultural Competence c. Empower d. Gaps in Service e. Mandated Reporter f. Referral g. Service Network h. Volunteer 20. Composites 21. Consequences of Being Part of an Initiative 22. Evaluation and Research <ol style="list-style-type: none"> a. Evaluation b. Evaluation Plan c. Focus Group d. Impact Data e. Impact Evaluation f. Interview g. Outcome Data h. Outcome Evaluation | <ol style="list-style-type: none"> i. Process Data j. Process Evaluation k. Qualitative Data l. Quantitative Data m. Questionnaire n. Research o. Survey 23. Grants Management and Organizational Issues <ol style="list-style-type: none"> a. Advisory b. Budget c. Consultant or Subcontractor d. Contract e. Interagency f. Job Description g. MIS h. MOU i. Network j. Press Release k. Quality Assurance l. Quality Improvement m. Stakeholder 24. Objectives 25. Organization Type <ol style="list-style-type: none"> a. Convening TA b. Education c. Innovative Project d. Multidisciplinary Team e. Research 26. Other <ol style="list-style-type: none"> a. Assets b. In-Kind c. Meeting 27. Other Issues <ol style="list-style-type: none"> a. Anecdote b. Normal Aging c. Policy Development d. Toolkit 28. Outcomes, Achievements, Problems |
|---|---|

<ul style="list-style-type: none"> a. Accomplishment b. Disseminate Curriculum or Manual c. Disseminate Findings or Model d. Goal, Objective, Activity e. Impact f. Lessons Learned and Conclusions g. Leveraged Funding h. Next Steps i. Outcome j. Problems, Barriers, Resolutions k. Program Modifications or Changes l. Reports m. Serendipitous Outcomes n. Sustainability 	<ul style="list-style-type: none"> i. Agencies Developing Services Because of Project Number
29. Outside of California	
30. Project Progress	
31. Project Title	
<ul style="list-style-type: none"> a. AAA Napa Solano b. Arrowhead Regional Medical Center c. CCSF d. City of Long Beach e. Council on Aging Silicon Valley f. EFPN g. Institute on Aging h. Judicial Council i. Riverside Regional County Medical Center j. San Diego County District Attorney k. San Diego State University l. Santa Clara County m. UCI Center of Excellence n. UCI Convening Center o. UCI Estimating Incidence of Elder Abuse p. UCLA Dentistry q. USC Forensic Center r. Wise Senior Services 	<ul style="list-style-type: none"> b. Assessment Meetings <ul style="list-style-type: none"> i. Assessment Meetings Number c. Asset Preservation Resolved <ul style="list-style-type: none"> i. Asset Preservation Resolved Not DA or Conservatorship ii. Asset Preservation Resolved Number iii. Asset Preservation Resolved through Conservatorship iv. Asset Preservation Resolved through DA v. Asset Preservation Resolved through Litigation vi. Asset Preservation Resolved through Negotiation vii. Asset Preservation Resolved Value of Assets d. Brief Assessments <ul style="list-style-type: none"> i. Brief Assessments Number e. District Attorney Filings <ul style="list-style-type: none"> i. District Attorney Filings Number f. Enhanced Services <ul style="list-style-type: none"> i. Enhanced Services for Number of Clients g. Formal Assessments <ul style="list-style-type: none"> i. Formal Assessments Number h. Formal Trainings for Mandated Reporters <ul style="list-style-type: none"> i. Formal Trainings for Mandated Reporters Number i. Improved Quality of Life <ul style="list-style-type: none"> i. Improved Quality of Life for Number of Clients
32. Quantitative Indicators	
<ul style="list-style-type: none"> a. Agencies Developing Services Because of Project 	

j. Informational Presentations <ul style="list-style-type: none"> i. Informational Presentations Attendance ii. Informational Presentations Number 	q. Linkages to other Archstone Grantees
k. Infrastructure Development Any <ul style="list-style-type: none"> i. Infrastructure Development Number of Meetings 	r. Most Important or Key Activity
l. Leveraged Resources <ul style="list-style-type: none"> i. Leveraged Resources Value 	s. Outcomes
m. Mandated Reporters Trained <ul style="list-style-type: none"> i. Mandated Reporters Trained Number 	t. Person Completing Report
n. Media Events <ul style="list-style-type: none"> i. Media Events Estimated Number Reached ii. Media Events Number 	u. Reporting Period
o. Volunteers <ul style="list-style-type: none"> i. Number Recruited ii. Volunteers Number Participating iii. Volunteers Participation iv. Volunteers Recruitment Activities 	v. Success 1
	w. Success 12345 Any
	x. Success 2
	y. Success 3
	z. Success 4
	aa. Success 5
	bb. Type of Grantee
33. Report Section	34. Services and Provider Groups
a. Activities to Meet Objective	a. Adult Protective Services
b. Anecdotes	b. Advocacy
c. Barrier 1	c. Assessment
d. Barrier 12345 Any	d. Case Conference
e. Barrier 2	e. Case Management
f. Barrier 3	f. Dentist
g. Barrier 4	g. FAST
h. Barrier 5	h. Financial
i. Brief Description of Project	i. Medical
j. Contact Person	j. Multidisciplinary
k. Data from which Outcomes are Observed	k. Multidisciplinary Team
l. Grant Title and Grant Number	l. Ombudsperson
m. Grantee Organization	m. Outreach
n. Headline	n. Prevention
o. Lessons Learned	o. Psychological
p. Linkages to Convening Center	p. Social Work
	35. Training, Education, Technical Assistance
	a. Curriculum
	b. Develop Curriculum
	c. Disseminate Curriculum
	d. Education
	e. Teach Curriculum
	f. Technical Assistance
	g. Training
	36. Triangle Charts

Similarly, the following nodes were used to analyze the stakeholder process interviews:

- | | |
|---|--|
| <ol style="list-style-type: none"> 1. Words of Wisdom and Lessons Learned 2. Sustainability 3. Successes 4. Leveraged Resources 5. Generalizability 6. Future Directions 7. Foundation Interaction 8. Evaluation TA 9. Cultural Competency 10. Challenges & Barriers 11. Characteristics of Services <ol style="list-style-type: none"> a. Best Practice b. Cultural Competence c. Empower d. Gaps in Service e. Mandated Reporter f. Referral g. Service Network h. Volunteer 12. Composites 13. Consequences of Being Part of an Initiative 14. Evaluation and Research <ol style="list-style-type: none"> a. Evaluation b. Evaluation Plan c. Focus Group d. Impact Data e. Impact Evaluation f. Interview g. Outcome Data h. Outcome Evaluation i. Process Data j. Process Evaluation k. Qualitative Data l. Quantitative Data m. Questionnaire n. Research o. Survey 15. Grants Management and Organizational Issues <ol style="list-style-type: none"> a. Advisory b. Budget c. Consultant or Subcontractor | <ol style="list-style-type: none"> d. Contract e. Interagency f. Job Description g. MIS h. MOU i. Network j. Press Release k. Quality Assurance l. Quality Improvement m. Stakeholder 16. Objectives 17. Organization Type <ol style="list-style-type: none"> a. Convening TA b. Education c. Innovative Project d. Multidisciplinary Team e. Research 18. Other <ol style="list-style-type: none"> a. Assets b. In-Kind c. Meeting 19. Other Issues <ol style="list-style-type: none"> a. Anecdote b. Normal Aging c. Policy Development d. Toolkit 20. Outcomes, Achievements, Problems <ol style="list-style-type: none"> a. Accomplishment b. Disseminate Curriculum or Manual c. Disseminate Findings or Model d. Goal, Objective, Activity e. Impact f. Lessons Learned and Conclusions g. Leveraged Funding h. Next Steps i. Outcome j. Problems, Barriers, Resolution k. Program Modifications or Changes l. Reports m. Serendipitous Outcomes |
|---|--|

n. Sustainability	iii. Asset Preservation Resolved through Conservatorship
21. Project Title	iv. Asset Preservation Resolved through DA
a. AAA Napa & Solano	v. Asset Preservation Resolved through Litigation
b. Arrowhead Regional Medical Center	vi. Asset Preservation Resolved through Negotiation
c. City College of San Francisco	vii. Asset Preservation Resolved Value of Assets
d. City of Long Beach	d. Brief Assessments
e. Council on Aging	i. Brief Assessments Number
f. County of Santa Clara	e. District Attorney Filings
g. Elder Financial Protection Network	i. District Attorney Filings Number
h. Institute on Aging	f. Enhanced Services
i. Judicial Council of California	i. Enhanced Services for Number of Clients
j. Riverside County Regional Medical Center	g. Formal Assessments
k. San Diego DA	i. Formal Assessments number
l. San Diego State University	h. Formal Trainings for Mandated Reporters
m. UCI Center of Excellence	i. Formal Trainings for Mandated Reporters Number
n. UCI Convening & TA	i. Improved Quality of Life
o. UCI Systems	i. Improved Quality of Life for Number of Clients
p. UCLA School of Dentistry	j. Informational Presentations
q. USC Forensic	i. Informational Presentations Attendance
r. Ventura FAST	ii. Informational Presentations Number
s. WISE Senior Services	k. Infrastructure Development
22. Project Progress	i. Infrastructure Development Number of Meetings
23. Project Type	l. Leveraged Resources
a. Convening Center	i. Leveraged Resources Value
b. Education and Training	m. Mandated Reporters Trained
c. Innovative Models	
d. Multidisciplinary Team	
e. Research	
24. Quantitative Indicators	
a. Agencies Developing Services Because of Project	
i. Agencies Developing Services Because of Project Number	
b. Assessment Meetings	
i. Assessment Meetings Number	
c. Asset Preservation Resolved	
i. Asset Preservation Resolved Not DA or Conservatorship	
ii. Asset Preservation Resolved Number	

<ul style="list-style-type: none"> <ul style="list-style-type: none"> i. Mandated Reporters Trained Number n. Media Events <ul style="list-style-type: none"> i. Media Events Estimated Number Reached ii. Media Events Number o. Volunteers <ul style="list-style-type: none"> i. Number Recruited ii. Volunteers Number Participating iii. Volunteers Participation iv. Volunteers Recruitment Activities 	<ul style="list-style-type: none"> 26. Services and Provider Groups <ul style="list-style-type: none"> a. Adult Protective Services b. Advocacy c. Assessment d. Case Conference e. Case Management f. Dentist g. FAST h. Financial i. Medical j. Multidisciplinary k. Multidisciplinary Team l. Ombudsperson m. Outreach n. Prevention o. Psychological p. Social Work 27. Training, Education, Technical Assistance <ul style="list-style-type: none"> a. Curriculum b. Develop Curriculum c. Disseminate Curriculum d. Education e. Teach Curriculum f. Technical Assistance g. Training 28. Triangle Charts
25. Report Sections	

APPENDIX IV: Cumulative Convening Evaluation Report

A Report by The Measurement Group

George Huba, PhD.
Kendra Northington, B.A.
Lisa A. Melchior, PhD.

I. BACKGROUND OF THE ELDER ABUSE AND NEGLECT INITIATIVE

In 2006, The Archstone Foundation began funding an initiative to improve the quality and coordination of elder abuse and neglect services in California. The Elder Abuse and Neglect Initiative was a five-year project divided into two major phases. Phase I funded 18 projects located within California and ran from January 1, 2006 to December 31, 2007. The second Phase also funded 18 projects and ran from January 1, 2008- December 31, 2010.

During each phase of the Initiative, the Archstone Foundation would periodically invite the 18 grantees to participate in a two day meeting known as convenings. The specific purpose of the meetings varied slightly each time, but each one provided the grantees time to interact with and learn about the other projects, Archstone staff, as well as share resources and build an elder abuse and neglect network. Special sessions were also held to allow grantees the opportunity to be a part of larger state and national meetings.

For each convening the Archstone Foundation partnered with The Measurement Group and the staff of the Convening and Technical Assistance Center at the University of California, Irvine to plan and set an agenda. The Measurement Group also prepared evaluation surveys for the grantees to complete in order to learn about their experience at the convenings. The results from each survey were presented into reports for the Archstone Foundation to provide feedback and guide the planning for future meetings. This report will use the information from those reports to summarize participants' experiences over time and the overall usefulness of the convening process with the greater Elder Abuse and Neglect Initiative.

II. CONVENING LOGISTICS

A total of three convenings were held during Phase I and seven were held in Phase II. Additionally, in Phase II a mini-convening and special forum was held in conjunction with the American Society on Aging and National Council on Aging (ASA-NCOA) Aging in America Conference. There was also a statewide elder abuse summit which many of the grantees attended.

Locations. As most of the projects were located in the southern California region, the meetings were rotated throughout that area to ensure maximum participation. The ten full scale convenings were held in the following locations:

- March 23-24, 2006 in Cost Mesa, California
- September 28-29, 2006 in Long Beach, California
- April 16-17, 2007 in San Jose, California
- February 12-13, 2008 in Newport Beach, California
- June 26-27, 2008 in Costa Mesa, California
- October 20-21, 2008 in San Jose, California
- May 18-19, 2009 in Costa Mesa, California
- October 15-16, 2009 in San Francisco, California
- February 24-25, 2010 in Costa Mesa, California
- September 27-28, 2010 in Long Beach, California

The mini-convening and the special forum within the ASA-NCOA Aging in America Conference were held March 16-17, 2009 in Las Vegas, Nevada. The California Elder Abuse Statewide Summit was held April 29-30, 2010 in San Francisco, California.

Attendees. The primary audience for the convenings was the grantees of the Archstone Foundation Elder Abuse and Neglect Initiative. The Phase I grantees consisted of eighteen projects characterized by three key program areas of the Initiative: Education and Training Grants, Multidisciplinary Team Development, and Innovative Projects and Research. The eighteen Phase II grantees were slightly reorganized into eight key program areas: Education and Training, Financial Protection, Forensic Centers, Legal Protection, Long-Term Care Ombudsman Services, Multidisciplinary Teams, Systems Analysis and Change, and Convening/Technical Assistance.

Typically one or two representatives from each project attended the meetings. Based on participant responses in the evaluations, they held a variety of positions within the project including: principal investigator, project director, administrator, manager, service provider, evaluator or researcher. Based on data collected at the final convening in September 2010, it appears that many individuals attended multiple convenings on behalf of their projects and were consistently involved. The following table shows how many prior convenings the September 2010 attendees had been to.

Table 1. Convening Attendance

Convening/Summit	September 2010 Participants Who Attended (<i>n</i> = 18)	
	<i>n</i>	%
<i>Phase I</i>		
March 2006 (Costa Mesa)	9	50.0%
September 2006 (Long Beach)	6	33.3%
April 2007 (San Jose)	8	44.4%
<i>Any Phase I Convening</i>	9	50.0%
<i>Phase II</i>		
February 2008 (Newport Beach)	11	61.1%
June 2008 (Costa Mesa)	14	77.8%
October 2008 (San Jose)	11	61.1%
March 2009 (ASA/NCOA; Las Vegas)	10	55.6%
May 2009 (Costa Mesa)	14	77.8%
October 2009 (San Francisco)	11	61.1%
February 2010 (Costa Mesa)	14	77.8%
April 2010 (CEJW Summit; San Francisco)	9	50.0%
September 2010 (Long Beach)	18	100.0%
<i>Any Phase II Convening/Summit</i>	18	100.0%
All Convenings/Summit	4	22.2%

Overall, the average number of convenings and special meetings attended by respondents was 7.50 (s.d. = 3.52). All participants attended at least one of the Phase II convenings, and the average number of Phase II convenings attended was 6.22 (s.d. = 2.62). Only one (5.6%) person reported being a first time attendee, and four (22.2%) indicated that they had attended all of the convenings and special meetings across both Phases.

Goals. As determined by the Archstone Foundation, the Convening and Technical Assistance Center at the University of California, Irvine, and The Measurement Group, the goals of the first few meetings were to build a solid foundation of support and interest to ensure the success of the Initiative. For the three convenings of Phase I and the first two convenings of Phase II the goals set out for the grantees included: increasing general skills within the field of elder abuse and neglect; allowing time for networking; conveying and reinforcing the expectations of the Archstone Foundation; assisting with report writing and evaluation forms; providing an introduction to the technical assistance portion of the Initiative; and motivating grantees for the Initiative. As the Initiative moved into Phase II and the projects were heavily in the implementation stage, the goals of the convenings focused more on shared issues of interest. Issues such as resource sharing and dissemination, working with service providers, and sustainability were at the forefront of grantee concerns.

III. SPECIAL MEETINGS AND THEMES

For issues that required more time for discussion or that allowed grantees the opportunity to connect with a larger elder abuse and neglect network, special convenings or sessions were held.

Sometimes the topic of interest was incorporated into existing convenings, other times grantees were encouraged to attend a separate meeting held in place of a traditional convening.

Future Action Small Groups. In Phase II of the Initiative, breakout groups were held at the convenings to allow grantees the opportunity to discuss different aspects of the elder abuse and neglect initiative. These groups were formed around the idea that they would be the basis of future work groups the grantees could continue to be involved with after the Archstone grant ended. As the initiative progressed and the grantees' objectives changed so did the small groups. Below are the names of the Future Action Small Groups and the convenings they met at:

Table 2. Future Action Small Groups

February and June 2008	October 2008 and May 2009	February 2010
Statewide Advocacy	Education and Training	California Elder Justice
Clinical Issues	Advocacy	Workgroup
Professional Training	Clinical Issues	Forensic Centers
Senior Outreach	Public Awareness	Education

When the groups met they worked on action plans, setting goals for the groups, the necessary steps to reach those goals, and action items for group members in the time between convenings. The ratings of the effectiveness of the Future Action Groups varied over time, but overall the majority of participants found them to be effective. The following table contains the effectiveness ratings of the Future Action Small Group meetings.

Table 3. Future Action Small Group Ratings

	Feb-08 (n = 20)	Jun-08 (n = 29)	Oct-08 (n = 24)	May-09 (n = 17)	Feb-10 (n = 18)
Very or Extremely Effective	60.0%	66.7%	79.2%	76.5%	94.4%

As the groups evolved to match the grantees concerns and the grantees took more active roles in the functioning of the groups, the meetings were found to be more effective at addressing the goals of the group.

Journal of Elder Abuse and Neglect (JEAN) Special Issue. In order to share the work of the Initiative with a larger audience, the Archstone Foundation organized for the grantees to write a series of papers to be published in a special issue of the *Journal of Elder Abuse and Neglect*. The issue included articles addressing topics such as forensic centers, minimizing financial abuse, the role of clinicians and attorneys on interdisciplinary teams, methods for improving and sustaining service systems to older adults, advocacy, and a future vision for elder abuse and neglect in America. All of the articles were collaborative efforts between individual project leaders, Archstone staff, and TMG staff.

At each of the convenings between June 2008 and May 2009, breakout groups were held to allow the grantees time to brainstorm ideas, discuss the goals of the papers, and work on the articles. Grantees attended breakout groups focused on the affinity group articles (systems change projects, multidisciplinary teams, education and training projects, and forensic centers) and those focused on the cross-cutting articles (Building Large Systems that Work,

Best/Innovative Clinical Practices, and The Vision for 2020). On each evaluation participants were asked to rate JEAN breakout groups and the clarity of the JEAN process. The results are presented in the following tables.

Table 4. Effectiveness of JEAN Breakout Groups at Addressing Goals

Breakout Groups	Rating	Jun-08 (n = 29)	Oct-08 (n = 27)	May-09 (n = 19)
Affinity Article	Very or Extremely Effective	93.1%	88.9%	84.2%
Cross-Cutting Article	Very or Extremely Effective	N/A	82.6%	75.0%

Table 5. Clarity of Explanation of JEAN Process and Final Product

	Jun-08 (n = 29)	Oct-08 (n = 27)	May-09 (n = 20)
Very or Extremely Clear	82.8%	66.6%	65.0%

Over time the ratings of the breakout groups' effectiveness decreased, but the majority of participants did find them to be effective. Compared to ratings obtained at earlier convenings, ratings of how clearly the process and end product for the JEAN special issue were explained were slightly less satisfactory than the first convening at which it was addressed.

ASA-NCOA Aging in America Conference and Mini-Convening. In March of 2009 the Archstone Foundation decided to partner with the larger Aging in America Conference, hosted by the American Society on Aging and the National Council on Aging, to provide grantees the opportunity to connect to a larger network of elder focused services. A one-day Mini-Convening was held on March 16, 2009, similar to previous convening in terms of the agenda and goals, but limited in time. Based on the 22 participant responses in the evaluation, 76.2% of respondents found the mini-convening to be Very Valuable or Extremely Valuable in helping them meet the goals of their grant. Furthermore, 90.9% found the information to be Very Relevant or Extremely Relevant to their work. Overall the Mini-Convening was viewed positively in moving forward not only the work of individual grantees but in the collective work of the Initiative.

The following day a special forum entitled *Elder Abuse and Neglect: Advancing the Field*, was hosted within the ASA-NCOA Aging in America Conference. Organized by the Archstone Foundation and the Center of Excellence in Elder Abuse and Neglect at the University of California, Irvine, the day-long session provided briefings on national issues, information about a statewide initiative in California, and the opportunity to share resources, ideas, and network with colleagues. Keynote presentations by nationally recognized experts in the field highlighted both social and medical perspectives of elder abuse, cutting edge cross-discipline efforts to address the problem, and the need for a national policy agenda on elder abuse. This special session was open to both the EANI grantees and the larger conference base. Of the 72 attendees who responded in the evaluation, a vast majority (93.1%) indicated that the Mini-Conference was either Very Relevant or Extremely Relevant for their work, and 95.8% indicated that the quality was either Very Good or Excellent. As one participant indicated, the session was "overall very good and engaging; very diverse topics and talented individuals presenting." Both EANI grantees and general conference attendees appreciated the material offered.

California Elder Abuse Statewide Summit. As part of a multi-pronged approach to improve California's response to elder abuse, the California Elder Justice Workgroup and the University of California, Irvine (UCI) Program in Geriatrics hosted a one and a half day Summit. The Summit was one component in a plan for addressing elder abuse and neglect in the state of California that includes:

- 1) Organizing an advisory group of service providers, researchers, program developers, and advocates
- 2) Conducting an environmental scan to identify and review the findings and recommendations of previous advocacy initiatives, including state hearings, task forces, and planning initiatives
- 3) Conducting a state summit
- 4) Developing a blueprint for improving California's response
- 5) Recruiting a corps of volunteers, including retired professionals and students, to assist with project activities

The activities surrounding the blueprint, including the Summit, were made possible through a grant from the Archstone Foundation. Development and planning of the program for the Summit was provided by the California Elder Justice Work Group, UCI, and the Archstone Foundation. The EANI grantees as well as other leaders in the field of elder abuse and neglect were invited to attend.

Overall, quality of the Summit was rated highly, with 93.6% of the participants who responded indicating that the quality was Very Good or Excellent. Of the participants who responded about the effectiveness of the Summit in identifying priority issues, 96.1% indicated it was very or extremely effective. One attendee commented that "...tons of great ideas came out of this summit-all very good and dynamic... As a convening and brainstorming session, this summit was great!" The sessions were overwhelmingly seen as useful for the purpose of formulating recommendations to address elder abuse and neglect in California. As another participant shared, "the number of specific recommendations [from the sessions] speaks to the fact that the summit did lead us toward a coordinated approach." Attendees left the meeting with specific and concrete recommendations to guide their future work in the field.

Sustainability. Sustainability has been a major theme of the Elder Abuse and Neglect Initiative from the beginning. The convenings were not just a way for the grantees to connect with one another during the length of the project, but to also establish and nurture networks that could continue after the Archstone funding. In between convenings monthly networking calls were held to encourage grantees to share resources and build relationships. At the February 2010 Convening, Brian Talcott, MSW from the Center for Civic Partnerships facilitated a day-long workshop on sustainability. Many evaluation participants commented that they received an "action plan for sustainability" and would follow-up with their staff about other funding sources. Although some participants would have preferred a more dynamic presentation at a more advanced level, the overall focus on sustainability was valued by the grantees, not only for their own programs, but also for sustaining the network of the Archstone EANI projects.

As sustainability was such an important issue, the effectiveness of the convenings in relation to sustainability was measured each time. The following table shows the participant ratings of the usefulness of the convening for sustaining their projects.

Table 6. Usefulness of Convening for Sustaining Project Beyond Initiative

Ratings of Very or Extremely Useful by Convening										
Mar-06 (n=30)	Sep-06 (n=26)	Apr-07 (n=28)	Feb-08 (n=20)	Jun-08 (n=29)	Oct-08 (n=27)	Mar-09 (n=22)	May-09 (n=19)	Oct-09 (n=20)	Feb-10 (n=18)	Sep-10 (n=18)
50.0%	38.5%	60.7%	50.0%	55.2%	44.4%	81.8%	57.9%	75.0%	83.3%	66.7%

The percentage of participants that perceived the convening to be very or extremely useful with respect to sustainability gradually increased over time, peaking at the February 2010 convening with the day-long workshop.

IV. EVALUATION

To obtain grantees' feedback to the convening process, as well as provide guidance for the planning committee, evaluation forms were developed by The Measurement Group. The forms were customized for each convening based on the speakers or special themes, however there were some questions, such as the one about sustainability, that were asked on nearly every evaluation. The forms were distributed to participants during the meeting and returned at the end of each convening. The following sections contain a selection of the aggregate quantitative and qualitative results of the evaluation forms.

Quantitative Results Across Time. This section summarizes data from the parallel questions asked across all the Phase I and II convenings. While it is not possible to test these differences statistically, we include this comparison to illustrate trends across convenings.

Table 7. Convening Ratings from 2006-2010*

	Mar 2006	Sep 2006	Apr 2007	Feb 2008	Jun 2008	Oct 2008	May 2009	Oct 2009	Feb 2010	Sep 2010
Very or Extremely Relevant for Work	<i>n</i> = 30 93.3%	<i>n</i> = 25 100%	<i>n</i> = 28 78.6%	<i>n</i> = 20 95.0%	<i>n</i> = 29 89.7%	<i>n</i> = 27 96.3%	<i>n</i> = 20 85.0%	<i>n</i> = 20 90.0%	<i>n</i> = 19 94.7%	<i>n</i> = 18 100%
Very Closely Matched Expectations	<i>n</i> = 29 75.9%	<i>n</i> = 26 88.5%	<i>n</i> = 28 82.1%	<i>n</i> = 20 90.0%	<i>n</i> = 29 89.7%	<i>n</i> = 27 85.2%	<i>n</i> = 20 90.0%	<i>n</i> = 20 100%	<i>n</i> = 19 78.9%	<i>n</i> = 18 94.4%
Very Likely to Use Information	<i>n</i> = 30 83.3%	<i>n</i> = 26 80.8%	<i>n</i> = 28 67.9%	<i>n</i> = 19 89.5%	<i>n</i> = 29 89.7%	<i>n</i> = 27 70.4%	<i>n</i> = 20 80.0%	<i>n</i> = 20 75.0%	<i>n</i> = 19 73.7%	<i>n</i> = 18 94.4%
Very or Extremely Valuable for Meeting Goals of Grant	<i>n</i> = 30 86.7%	<i>n</i> = 26 76.9%	<i>n</i> = 27 70.4%	<i>n</i> = 19 78.9%	<i>n</i> = 28 85.7%	<i>n</i> = 27 81.4%	<i>n</i> = 20 85.0%	<i>n</i> = 20 80.0%	<i>n</i> = 19 84.2%	<i>n</i> = 18 94.4%
Resource Sharing Very or Extremely Useful	N/A	<i>n</i> = 26 57.7%	<i>n</i> = 25 72.0%	<i>n</i> = 18 83.3%	<i>n</i> = 26 76.9%	<i>n</i> = 27 85.2%	<i>n</i> = 19 73.7%	<i>n</i> = 20 95.0%	<i>n</i> = 17 88.2%	<i>n</i> = 18 94.4%
Appropriate Number of Networking Opportunities	<i>n</i> = 30 90.0%	<i>n</i> = 26 65.4%	<i>n</i> = 28 82.1%	<i>n</i> = 20 90.0%	<i>n</i> = 29 89.7%	<i>n</i> = 27 85.2%	<i>n</i> = 20 85.0%	<i>n</i> = 20 90.0%	<i>n</i> = 19 89.5%	<i>n</i> = 17 88.2%
Very or Extremely Conducive Setting for Networking	<i>n</i> = 30 93.3%	<i>n</i> = 26 76.9%	<i>n</i> = 28 82.1%	<i>n</i> = 20 90.0%	<i>n</i> = 29 96.6%	<i>n</i> = 27 88.9%	<i>n</i> = 20 100%	<i>n</i> = 20 95.0%	<i>n</i> = 19 89.5%	<i>n</i> = 18 94.4%
Appropriate Balance of Grantee Participation vs. Speakers	<i>n</i> = 30 93.3%	<i>n</i> = 25 68.0%	<i>n</i> = 28 89.3%	<i>n</i> = 19 89.5%	<i>n</i> = 28 85.7%	<i>n</i> = 27 85.2%	<i>n</i> = 18 100%	<i>n</i> = 20 90.0%	<i>n</i> = 19 78.9%	<i>n</i> = 17 82.4%
Very Good or Excellent Quality	<i>n</i> = 30 100%	<i>n</i> = 26 92.3%	<i>n</i> = 28 92.9%	<i>n</i> = 19 100%	<i>n</i> = 29 93.1%	<i>n</i> = 27 100%	<i>n</i> = 20 85.0%	<i>n</i> = 20 100%	<i>n</i> = 19 89.5%	<i>n</i> = 18 94.4%

* Data not included from March 2009 Convening, which was a different format and focus, held in conjunction with the 2009 ASA/NCOA Aging in America conference in Las Vegas, Nevada, nor from the April 2010 California Elder Abuse Statewide Summit.

Overall, participants' ratings of the convenings remained steady across time, with the greatest changes occurring between the earlier meetings.

Qualitative Results Across Time. In addition to rating the convening sessions, participants were also asked to provide responses about how they plan to use the information from the convening, areas, that needed improvement, and any other comments they had. This section contains selected examples of the open-ended responses provided by participants across Phase I and II. Please note that the selected examples do not represent all attendees and were selected to demonstrate the different types of answers provided.

Table 8. Open-Ended Responses from Convening Evaluations 2006-2010

Question	Selected Examples
How will you use the information and resources provided at the Convening?	<ul style="list-style-type: none"> • “There has been some hesitation among social agencies to adopt a ‘FAST/MDT’ program and the FAST has been stalled at past convenings. I can use the Archstone information to overcome their objections.” • “We plan to distribute [another project’s] brochures along with our materials at community presentations.” • “The ability to see the big picture (other projects) will help generate sustainability ideas for us.” • “Utilize other curricula to ensure our basic modules are compatible.” • “Use information from other projects to design clinic protocol for reporting.” • “Several projects provide ideas for future projects in our area (specifically-A Clergy Outreach Project is in our future!).” • “Better understand what sustainability means to my project.” • “Being able to see that the MDTs had common barriers and now to overcome them.” • “Podcast approach to dispersing information-we want to make one!” • “We will do sustainability focus using steps and materials (e.g. Connections Map)”

Table 8. Open-Ended Responses from Convening Evaluations 2006-2010

Question	Selected Examples
Are there sessions that were not included that would have been helpful?	<ul style="list-style-type: none">• “It would be helpful to have more information from best practices or other funded similar projects in the region, state, or nation via video, PowerPoint, or presentation by a professional.”• “Seems there needs to be opportunity to convene for purpose of brainstorming as a group about group-wide collaboration on sharing of resources: legislation, data collection, and advocating, statewide and national.”• “Funding opportunity workshop: What options are out there? What are they funding? (Other funders, federal, DOJ, etc.)”• “Nice to have at least one outside presenter on a substantive issue of interest to grantees (may have been superseded this convening by international conference).”• “Evaluation of training outcomes/programs as related to change in practice in the field.”• “Cultural issues-how to sensitively address EA in diverse communities and how it's handled in other countries.”• “I'd like to use all of the talent here to talk about policy issues and where we would all like this field to go.”• “Have plenary with entire group to discuss our network.”• “None come to mind except a prioritizing to better prepare for sustainability workshop.”• “More discussion about issues, problems in addition to successes. Both are instructional.”
How do you plan to build on the networking connections made at the Convening?	<ul style="list-style-type: none">• “I have a list now of people I can call on for information in legal, financial, and care management issues that I did not have before since I'm new in this field.”• “I am going to contact a couple of researchers here to brainstorm on our design.”• “I now know more trainings that are offered and trainings that I may be able to attend.”• “Joined Elder Abuse Awareness Day Committee.”• “Continue to build statewide networks across common elder abuse/neglect (financial abuse) prevention response efforts.”• “Connect with area agencies for resource materials.”• “More frequent e-mails to other members sharing of human resources.”• “Talking with fellow Archstone grantees about their show and tell ideas.”• “Participate in sustainability planning with other forensic centers, including legislative advocacy to secure state funding.”

Table 8. Open-Ended Responses from Convening Evaluations 2006-2010

Question	Selected Examples
Suggestions for Improvement	<ul style="list-style-type: none">• “I would like to have had entities identified that can lobby or move forward legislation supported by elder abuse initiative data, results, etc.”• “Next meeting should have time for grantee types to meet individually.”• “Although solicitation of input was very global by the moderators, there seem to be voices heard more than others. I am not sure if there is a problem, but it seems sometimes the meeting becomes focused on the few and not the all.”• “Very nice - thank you for convening the group. At times I did feel rushed - maybe allow more time with less to cover. Felt like there was not time for large group discussion or questions.”• “It can be very difficult for a shy person to make herself at home in an already very tight-knit group and my suggestion would improve the cohesiveness of the group as new people join.”• “Evening reception/networking would have been better facilitated had it been a standing bar area rather than a sit-down situation, would have made it easier to make introductions.”• “Luxurious and yummy-but likely expensive. We should cut expenses.”• “Regarding JEAN articles-would have helped to have drafts before the Convening.”• “Would like to hear more from Archstone staff/representatives.”• “Elder Abuse Summit info could have been more concise and interactive especially because of its ‘exclusivity’ and lack of relevance to many participants.”• “It was a feel good Convening vs. previous that were more work intensive. A keynote to send us off with fire and enthusiasm to keep going would have been a plus or bonus.”

Table 8. Open-Ended Responses from Convening Evaluations 2006-2010

Question	Selected Examples
Additional Comments	<ul style="list-style-type: none">• “I’m fairly new to working in the area of Elder Abuse; therefore, I want to thank you for this opportunity to learn, understand, and network with the experts in the field.”• “Great conference. The positive attitudes and hope that we as a collective group can make a difference in the field of elder abuse is encouraging.”• “Reception was an important avenue for networking. Actually it was KEY. I was able to meet and talk in depth with others in a relaxed atmosphere. Met people I would not have otherwise met and on more than just an acquaintance level.”• “The Convenings have become more useful/engaging over time as projects are maturing and developing more projects.”• “Enjoy the energy of the participants-much excitement about progress and accomplishments.”• “Extremely valuable to have face-to-face time to work on materials, increase buy-in amongst stakeholders and network on initiatives.”• “Very successful-Thanks for the opportunity to network and share ideas.”• “Working on the articles was a great opportunity to learn about common barriers/solutions that other projects experienced.”• “The show and tell portions were very informing and were very impressive.”• “These Convenings are invaluable for sharing ideas, problem-solving, social support, and future planning.”• “The Convenings were the heart of this initiative. Joining with others who shared our passion for elder justice and fairness was a constant reinforcement of our enthusiasm and focus. It's difficult to quantify this synergy.”

Based on the qualitative feedback it can be determined that the participants found the Initiative as whole to be extremely energizing and well-run with great agendas. There were suggestions to improve the time management and type of sessions offered but overall attendees indicated that there were many resources they could utilize and opportunities to extend their network.

V. CONCLUSIONS

The following conclusions can be made based on the data presented above:

- Reflecting back on the overall Initiative, participants felt that the convening process was very important part of the experience of being in the Archstone Elder Abuse & Neglect Initiative. A majority of participants also found networking, sharing of project information, formal presentations by EANI members, and small work groups at the convenings to be particularly useful. One participant indicated that this was his or her “best experience ever in planning, coordination, and development of local, statewide, national, and worldwide efforts.” The initiative also allowed for participants to “convene as a group and discuss challenges, opportunities, and potential collaborations.”
- Participants consistently rated the quality of the convenings highly, indicating that they were highly relevant to their work, matched their expectations, provided useful resources and information, and provided an environment that was conducive to networking. Many attendees expressed that there was a high likelihood of using information from each of the convenings in their own work and they provided examples of how they planned to utilize the resources.
- The convenings were an integral part of the Initiative as they provided the opportunity for grantees to connect to one another and share information and resources to enhance each project’s work. Many participants indicated that there was an appropriate number of networking opportunities and that they were able to build upon the connections made at the meetings.