

# Adult Protection Multidisciplinary Teams – Initial Planning Worksheet

Newly formed adult protection multidisciplinary teams (MDTs) can use this worksheet as a structured approach to plan and enhance the effectiveness of their MDTs. In Step One, the team identifies potential challenges stemming from conflicting professional responsibilities and outlines current levels of organizational support. By recognizing existing strengths and desired changes, teams lay the groundwork for strategic improvement.

Step Two guides teams in assessing their current expertise and determining necessary professions for both full-time representation and as-needed participation. Through this process, teams identify gaps in expertise and develop a plan for recruiting new members to fill them. Using this worksheet empowers teams to proactively address challenges, leverage strengths, and optimize their MDT's functionality to better serve their community.

## Step One: Initial Planning

Answer the four questions below to assist with initial planning for your MDT.

**1. Members of MDTs hold various professional responsibilities. Below are examples of potentially competing interests among members that might impede success of an MDT. Identify others that exist or may emerge in your MDT.**

<hr/> Upholding confidentiality <hr/>		<hr/> Ensuring complete communication <hr/>
<hr/> Flexible client service <hr/>		<hr/> One-size fits-all responses <hr/>
<hr/>	<b>versus</b>	<hr/>
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**2. How do the organizations represented on your MDT currently provide staff to support its work?**

- Our MDT has just begun so it is unclear.
- There is opposition to assigning staff to the MDT because it is not viewed as a priority.
- The MDT work “flies under the radar” and is informally supported.
- The MDT is formally added into job descriptions or expectations.
- The MDT is a formal, full-time focus of one or a few people.
- Other: \_\_\_\_\_

**3. Existing strengths, assets, resources, or opportunities that can be used in building your MDT are:**

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**4. Three changes we would like to encourage in our community are:**

**a.**

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**b.**

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**c.**

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## Step Two: Assessing Team Needs

Use this tool to assess whether you need to recruit others to your team, bearing in mind that the people you need for discussions related to *how your system works* might differ somewhat from those you need for *case reviews*. There might also be expertise that is critical to relatively few cases.

When considering the current members of your MDT, what kinds of expertise, access, procedural knowledge, or logistical support need to be strengthened?

Which professions or life experiences should be represented **full-time** on the MDT? **FT**  
Which professions or life experiences should be represented **as needed**? **AN**

Clerks of court	Faith community representatives
Adult Protective Services professionals	Local Alzheimer's Association representatives
Adult Protective Services attorneys	Financial institution representatives
Law enforcement professionals	Home health or companion services industry representatives
Prosecutors/district attorneys	Fire department and emergency medical technicians
Geriatricians	Animal advocates
Neuropsychologists, clinical psychologists, geriatric psychiatrists	Child Protective Services representatives
Forensic nurses	Hospital discharge planners or health care social workers
Sexual assault nurse examiners	Probation and parole officers
Representatives from aging services organizations	Coroners
Mental health professionals	Forensic interviewers
Substance abuse professionals	Forensic accountants
Intellectual and developmental disability professionals	Rehabilitation services providers
Civil attorneys (e.g., probate, family, or elder law)	Housing advocates
Legal aid attorneys	Disability advocates
Long-term care ombudsman	Sexual assault advocates
Area Agency on Aging representative	Consumer protection representatives and other state regulatory agencies (Attorney General, Department of Insurance, Secretary of State)
Occupational therapists	Realtors/real estate attorneys
Victim advocates	Environmental health inspectors
Community-based service providers (Meals on Wheels, transportation providers, etc.)	Victim representatives
Domestic violence advocates	Clients/older adults/adults with disabilities
Public guardians	Other:
Private guardians	
Guardian ad litem attorneys and other court-appointed attorneys	

**Of the professions or life experiences that need to be represented *full-time*, who is missing from your MDT?**

Profession or Perspective	Specific names of people who might fill that role in your community
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**Of the *as-needed* professions or life experiences, who is missing from your MDT?**

Profession or Perspective	Specific names of people who might fill that role in your community
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**What process will we apply as a group to fill gaps on your MDT and recruit new members?**

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## Reference Materials Available in the North Carolina Adult Protection Network MDT Toolkit

- **Sample Member Roles and Responsibilities.** A sample description of the roles and responsibilities of the MDT coordinator and team members.
- **Form Recruitment Letters.** Sample recruitment letters inviting new members to join the MDT.

## Reference Materials Available in the US Department of Justice Elder Justice Initiative MDT Guide and Toolkit

- **Member Roles and Contributions.** A description of possible professions and related contributions of those professions on an MDT available at:

<https://www.justice.gov/elderjustice/file/938801/dl>