



## **Tools and Strategies for Prosecuting Elder Abuse Cases: Virtual Training Series for Prosecutors**

### **Presenter biographies**

**Alicia Aiken** has dedicated 25 years to working within the public and non-profit sectors to further social justice for people living in poverty and surviving violence. Alicia brings a deep understanding of the legal and social services non-profit sector, having spent 15 years as a practicing attorney and then a member of the Executive Committee at Legal Aid Chicago.

Alicia is a Principal at the Danu Center for Strategic Advocacy, and the Director of the Danu Center's Confidentiality Institute, a national policy and technical assistance project that supports helping professionals to protect privacy for crime victims. In 2016, Alicia became the Faculty Fellow for Practicing Law Institute's Interactive Learning Center where she designs innovative programs that teach lawyers to work well with individual clients. Alicia regularly strategizes with direct service non-profits, local coalitions, government entities, law firms, and professional organizations on a wide range of issues, including service delivery models, organizational structure, internal procedures, legal compliance, litigation strategy, policy advocacy, professional development, and distance learning design.

Alicia attended the University of Michigan, where she received a Law degree ('95) and a Bachelor of Arts in English/History ('92). In 2006-2007, Alicia was awarded the Chicago Foundation for Women Founder's Award, enabling her to study organizational change at Northwestern University, and to undertake a national study of model domestic violence courts. Most recently, she received the American Bar Association's 2018 Sharon L. Corbitt Award for Exemplary Legal Service to Victims of Domestic Violence, Sexual Assault and Stalking.

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**National Clearinghouse on Abuse in Later Life (NCALL)**

A project of End Domestic Abuse Wisconsin

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**Candace Heisler** served as an assistant district attorney for more than 25 years for the City and County of San Francisco where she headed the Domestic Violence, Charging, Misdemeanor, and Preliminary Hearing Units. Ms. Heisler has served as a trainer and consultant for a variety of federal, state, and other organizations and governmental entities in the areas of elder abuse and domestic violence. She has edited bench guides for judicial officers and manuals for prosecutors on Domestic Violence and Elder Abuse and has helped develop curricula on elder abuse for judges, prosecutors, law enforcement, Adult Protective Services workers, and victim advocates for the U.S. Department of Justice, Office on Violence Against Women, the American Bar Association, and the California Courts. She has helped design training curricula on domestic violence for first responders, field training officers, investigators, crisis negotiators, and expert witnesses for California law enforcement and has helped create and deliver training on policing of domestic violence and sexual assault matters on tribal lands and on handling child abuse cases in which the child has a disability. She has designed curricula for Protective Services workers on working with the criminal justice system, undue influence, and documentation.

Ms. Heisler trains probation officers, emergency dispatchers, aging services, health care, and advocates about elder abuse and domestic violence. She has taught legal ethics to a variety of professionals including prosecutors. She recently was part of an OVC grant on polyvictimization in later life and was a member of the technical assistance team for the National Adult Protective Services Association Resource Center grant where she was the subject matter expert on elder criminal justice issues.

She has authored numerous books and articles on domestic violence and elder abuse, including several in the Journal of Elder Abuse and Neglect on topics including law and ethics, the role of the criminal justice system, and polyvictimization. She co-authored *Elder Abuse Detection and Intervention: A Collaborative Approach*, “Forensic Markers in Elder Abuse” in the 2017 text book Elder Abuse (X. Dong, ed, Springer), and “Elder Abuse” in the book *Victims of Crime*. She participated in the creation of a prosecutor resource on elder abuse for AEquitas and completed work on a California Judges Guide on Abuse in Later Life.

**Chris Merkle** was born and raised in rural South Dakota and moved to Colorado in 1985. He received his Associate of Arts Degree in Criminal Justice, which ignited his passion for law enforcement and public service. In 1996, Chris was hired by the Longmont Police Department and was assigned to the Patrol Division. Throughout his career, Chris served in specialized assignments within the Longmont Police Department, including the Traffic Unit, the Personnel and Training Unit, and his last assignment was in the Detective Division as a Persons Crimes Investigator. After 25 years of service Chris retired from the Longmont Police Department. He now works as an Investigator for the Boulder County District Attorney's Office (20th Judicial District).

In 2009, Chris attended a 40 hour "train the trainer" event sponsored by the Federal Law Enforcement Training Center. This course focused on effective strategies for law enforcement investigations concerning At-Risk Elders experiencing abusive environments. This training sparked a passion for Chris, who became one of the original trainers in a multidisciplinary team responsible for training over 400 law enforcement officers in Boulder County in the first two years of the grant training cycle. In 2014 and 2016, Colorado passed legislation on Mandatory Reporting of crimes against At-Risk Elders and At-Risk Adults with an IDD. Chris spearheaded training for law enforcement officials to facilitate proper understanding and enforcement of this new law. He also educated community agencies and businesses named by statute as mandatory reporters.

Chris is a member of several multidisciplinary teams that advocate for the vulnerable at-risk population, including the Boulder County Adult Protection Review Team and the Elder Justice Coalition. He has investigated numerous crimes involving At-Risk Elders and Adults with an IDD, many of which were successfully prosecuted, resulting in convictions. Chris is dedicated to serving those who often have no voice and cannot advocate for themselves.

**Harry E. Morgan, M.D.**, has developed and is president of The Center for Geriatric and Family Psychiatry, Inc., located in Glastonbury, Connecticut. The practice is a unique multidisciplinary professional group committed to providing for the mental health care needs of the elderly and their families. Dr. Morgan is a member of the active psychiatric staff at the Institute of Living/Hartford Hospital and was an assistant clinical professor at the University of Connecticut Health Center. He is the Medical Director for the Alzheimer's Resource Center of Connecticut in Southington, Connecticut. He is an active psychiatric consultant to many agencies, care facilities, and homecare organizations. He has consulted regularly with Connecticut's Protective Services to the elderly for thirty years. Dr. Morgan is Board Certified in Geriatric Psychiatry. He is a member of the Medical Advisory Board of the Alzheimer's Association of Connecticut, an active member of the American Association for Geriatric Psychiatry, and an active member of the American Psychiatric Association. As a Geriatric Psychiatrist, his teaching interests include education related to Alzheimer's disease and other dementing illnesses of later life, the diagnosis and treatment of depressive illness as it affects adults in later life, and the study of personality development during aging. He has consulted and taught nationally on topics related to forensic issues in geriatrics and aging. Dr. Morgan's clinical work with patients and families occurs in the office, in long term care facilities, and in patient's homes. Dr. Morgan was educated at Dartmouth College, where he received his B.A. degree. He obtained his M.D. degree from Harvard Medical School and completed his psychiatric residency at the University of Cincinnati Medical Center.

**Jane Walsh** is a Senior Deputy in the Denver District Attorney's Office, and is the Director of the At-Risk Protection Unit. She prosecutes crimes against older adults and people with disabilities. She previously developed and headed up a similar unit in the Boulder District Attorney's Office for seven years. She originally qualified as an attorney in Scotland, and then requalified in England and worked in Oxford.

Jane has tried a wide range of financial crimes, including undue influence and exploitation cases during her time as a DA in Colorado. This led her to work with Colorado legislators to try to make it easier to prosecute these cases. Colorado now has a statute which enables prosecutors to obtain a video deposition on demand if a victim is at risk. Courts must schedule this within fourteen days of the prosecution request. Another statute widens the admission of hearsay statements for all offenses involving victims with intellectual and developmental disabilities.

**Jonathan H. Kurland** is an Attorney Advisor with AEquitas.

Prior to joining AEquitas, Jonathan worked in the District Attorney's Office of Berks County, Pennsylvania where he started as a line Assistant District Attorney and prosecuted the range of cases typical for a jurisdiction with a combination of urban, suburban, and rural communities. However, over time, Jonathan's focus increasingly trended to violent crime and cases involving the most vulnerable and exploited of victims. When Jonathan left after sixteen years in the District Attorney's Office to join AEquitas, he was the Chief Deputy District Attorney and supervised, advised, and still prosecuted matters involving elder abuse, intimate partner violence and homicides, sexual violence, child abuse, and grand jury investigations. During his time in the Berks County District Attorney's Office, Jonathan has extensive experience working with multidisciplinary partners, including victim advocacy and medical professionals. He was a founding member of the Berks County Elder Abuse Task Force where he represented the District Attorney's Office in a multi-discipline team that reviewed issues and cases relating to physical and financial abuse of seniors.

In addition to his trial and supervisory experience, Jonathan served for two years in the appellate unit. He was assigned as a Special Assistant U.S. Attorney for Berks County, where he served as liaison to multiple agencies to facilitate federal adoption of prosecutions involving complex criminal enterprises and violent career criminals. He also served as adjunct faculty at Alvernia University, where he taught courses in the Criminal Justice Department.

Jonathan remains based in Berks County where he lives with his wife and son and spends his spare time running or feeling guilty for skipping running.

**Kathy Van Olst** is a Senior Deputy Prosecuting Attorney for the King County Prosecuting Attorney's Office in Seattle, Washington. Currently, she is the Vice Chair of the Special Assault Unit where she manages and handles cases and supervises attorneys that handle sexual assault crimes against adults, children and vulnerable adults as well as physical abuse and death cases involving children at the Maleng Regional Justice Center in Kent. Prior to this position, Kathy worked as one of the elder abuse prosecutors in the Office handling elder abuse, neglect and exploitation cases for four years. Kathy has approximately 20 years of experience as a trial deputy in the Criminal Division of the King County Prosecuting Attorney's Office. Kathy has also served as the Director for the King County Department of Adult and Juvenile Detention. She began her legal career in Washington in private civil practice. Kathy was admitted to the Washington State Bar in 1991.

**Lisamarie Bristol** (JD) is an Assistant District Attorney in the Gwinnett County Office of the District Attorney in the Metro-Atlanta area of Georgia. Prior to that, she served as an Assistant Solicitor-General in the Office of the DeKalb County Solicitor-General, also in the Metro-Atlanta area of Georgia. She received her law degree from Georgia State University College of Law in Atlanta, Georgia after earning her Bachelor of Science in Psychology with Specialized Honours from York University in Toronto, Ontario Canada. After her admittance to the Georgia State Bar in 2009, Lisamarie worked for four years as a public defender before transitioning into prosecution. In 2014, she joined the DeKalb Solicitor-General's office. There, she was assigned to the Special Victims Unit handling cases involving more serious cases of domestic violence, crimes against vulnerable victims, elder abuse cases, stalking cases and animal cruelty cases. In early 2018, Lisamarie joined the Gwinnett County District Attorney's Office where her case load includes all types of felony cases, including Elder abuse and exploitation cases.

Lisamarie served as part of a multi-agency team that conducted training for hundreds of law enforcement officers in DeKalb County in recognizing and investigating elder abuse crimes in the community. The purpose of the training was to better equip first responders to recognize signs of elder abuse and take immediate action. She currently serves as part of a team that conducts trainings for prosecutors and law enforcement officers nationwide on the prosecution and investigation of elder abuse cases.

**Page Ulrey** is a Senior Deputy Prosecuting Attorney at the King County Prosecutor's Office. She graduated from Amherst College and Northeastern University School of Law. After law school, she worked for four and a half years as a public defender in Seattle. In 1998, she went to work at the King County Prosecutor's Office, where she has prosecuted domestic violence and mainstream cases, supervised the prosecution of misdemeanor cases, and chaired the Juvenile Unit of her office.

Page was appointed to the then newly-created position of elder abuse prosecutor in the Criminal Division of her office in 2001. For the next five years, she prosecuted cases of elder and vulnerable adult abuse and neglect. She also founded and chaired the King County Elder Abuse Council and Criminal Mistreatment Review Panel.

Since September, 2007, Page has been working in the office's Economic Crimes Unit, where she prosecutes cases of elder financial abuse, neglect, sexual assault, and homicide and co-chairs the King County Elder Abuse Council. She works on curriculum development and is a member of the national training team for the Office on Violence Against Women. Page conducts training and presentations on elder and vulnerable adult neglect, abuse, and exploitation locally and throughout the country.

**Shelly Carlson** is the Criminal Justice Systems Manager for the Minnesota Elder Justice Center and conducts elder abuse trainings across the state of Minnesota to law enforcement, prosecutors, judges, probation officers, APS, and domestic violence/ sexual assault advocates. Additionally, Ms. Carlson provides technical assistance and training to communities on establishing and maintaining elder abuse MDT's and CCR's. Prior to her current position, she coordinated federal elder abuse grants in Minnesota and North Dakota to help create systemic change in regards to elder abuse response, provided direct services to victims of domestic violence, sexual assault and general crime for 18 years in non-profit agencies, prosecutor's offices and within a campus violence university program, and coordinated federal criminal justice/domestic violence grants at the domestic violence/sexual assault coalition in North Dakota. Ms. Carlson has trained nationally in twenty-three states and two U.S. territories with the National Clearinghouse on Abuse in Later Life, the National Council on Juvenile & Family Court Judges, the Federal Law Enforcement Training Center, and the National Sheriff's Association, in addition to training internationally in the countries of Serbia, Latvia, Lithuania and Moldova for Global Rights for Women and the Advocates for Human Rights. Ms. Carlson earned her Master's Degree in Public Administration and her Bachelor of Science degree in Legal Assistance from Minnesota State University – Moorhead, where she has been adjunct faculty.

**Tara Patet** is a senior prosecutor with the City Attorney's Office in St. Paul, Minnesota, where she oversees the Crimes Against Persons Division. She has a bachelor of arts degree in criminal justice and political science from the University of St. Thomas and received her law degree from William Mitchell College of Law. She's been a prosecutor for 25 years, specializing in domestic violence and elder abuse cases. Ms. Patet is cross-deputized to prosecute misdemeanor and felony-level cases as part of the Joint Special Victims Unit focusing on high-risk domestic violence and crimes perpetrated against elders and vulnerable adults.

Ms. Patet is certified through the U.S. Department of Justice to train law enforcement, prosecutors, and social service professionals in the areas of domestic violence and elder abuse. She has assisted in the ongoing development of training curricula in these areas and conducts national training for the Dept. of Justice, Office of Violence Against Women, and National Clearinghouse on Abuse in Later Life. In addition, Ms. Patet conducts domestic violence and elder abuse best practices training for prosecutors and is a faculty member and instructor for the National Institute on the Prosecution of Elder Abuse.

Ms. Patet is active with the Minnesota Elder Justice Center and has served as Chair of the Criminal Code Subcommittee, which has drafted and lobbied for legislative initiatives that aim to protect elders and vulnerable adults. In 2018, Ms. Patet was the recipient of the Elder Justice Center's Jane Ochrymowycz Award for her work in the pursuit of justice for older adults.

**Veronica LoFaso** (MD, MS) practiced for 10 years as an Adult Nurse Practitioner before returning to medical school at Albert Einstein College of Medicine to pursue her MD degree. She completed her internship and residency at New York-Presbyterian Hospital and then joined the Division of Geriatrics in 1997.

Dr. LoFaso has extensive experience in medical education, curriculum development, and mentoring medical students and residents. She is the co-creator and assistant course director for the LEAP Course and co-director of the MSTAR Summer Research Program in Geriatrics and the Geriatrics Interest Group for medical students. She is director of the Geriatrics elective, as well as co-director of the Area of Concentration in Geriatrics. She is responsible for creating the original Geriatrics curriculum for the Weill Cornell Physician's Assistant Program, and acts as clinical preceptor and thesis mentor for these students.

Dr. LoFaso has received several awards for excellence in teaching at Weill Cornell Medical College and is a two-time recipient of the Leonard P. Tow Humanism in Medicine Award (Arnold P. Gold Foundation). She was the founder and director of the Medical Home Visit program at Cornell (referenced in articles in *The New England Journal of Medicine* and *Crain's New York*), and received the Roland Balay Clinical Scholar award in Geriatrics for her work in that area.

Dr LoFaso's other area of interest is in prevention, detection, and education about Elder Abuse and Neglect. Her sabbatical work was a collaborative project with the Brooklyn District Attorney's Office and the Emergency Department at NYPH, which involved reviewing the legal (and medical) documentation of highly adjudicated elder abuse cases to categorize the physical injury patterns sustained by elder abuse victims. This work is ongoing and will involve reviewing legal documents from the other NYC boroughs going forward. Her publications include articles in the field of medical education and elder abuse and neglect.