Overview of Achievements

During this reporting period, we closed 4,677 cases, benefitting 7,590 persons while this is only an increase of 43 cases since the 2020-2021 reporting period, it is still significant since the courts were either closed or operating on a limited schedule during the past year. In addition, we conducted 201 presentations, benefitting 10,049 people. The primary target of our services are older low-income persons and persons with disabilities, however; several of our programs are available to the general low-income population (our medical-legal partnership, the MedLaw Partnership of WNY, our Kinship Care Unit, and our Health Care Advocacy Unit). We provided $5,392,779.13 (both direct and indirect) to our clients and $693,072.00 benefit to taxpayers.

A significant improvement in our capacity to deliver civil legal services was the expansion of our Free Senior Legal Advice Helpline. The COVID-19 pandemic prompted us to quickly pivot and offer our Free Senior Legal Advice Helpline to a wider audience (all ages and statewide) instead of limiting it to seniors in Western New York. As a result of our helpline, we did not see any decrease in closed cases from this reporting period compared to the last.

We were happy to return to in-person outreach during the second half of 2021, and provided information and resources to Western New Yorkers through events with organizations such as Niagara Pride, Evans Bank, the New York State Bar Association, the Rural Outreach Center, and Kaleida Health, to name a few. We also continued to hold webinars in order to reach a wider audience, such as Scams on the Rise, Dissecting the Latest FTC & BBB Data; Legal and Financial Planning for Dementia; and Advance Care Planning. Our attorney presented on a webinar sponsored by the National Center on Law and Elder Rights (NCLER) entitled Patching the Safety Net: Survivor’s Benefits for LGBTQ Older Adults. This past year we reached 10,049 people through client presentations, 571 professionals attended our conference presentations, trainings, and CLE’s, and we estimate reaching 137,595 people through radio and TV. We reached 61,218 website visitors. Overall, we served 17 counties through outreach.

Population Served: The Elderly, Disabled or Disadvantaged

Area Served: 11–County Area of Western New York; Erie, Niagara, Cattaraugus, Chautauqua, Wyoming, Orleans, Genesee, Allegany, Monroe, Steuben, Livingston

Staffing Full Time Equivalents:
- Total Staff: 62.5
- Lawyers: 23.5
- Paralegals: 18.5
- Other Staff: 20.5
Direct Legal Services: Cases

Our elderly client, Deborah, was confused when she started receiving daily calls that she owed her landlord much more money than she thought. They refused to give her an account in writing and she would no longer be able to move if she owed the monies they said she did. After Deborah contacted our office for help, we were able to identify these calls as an imposter scam. We encouraged her to contact her normal caseworker and helped Deborah avoid losing money to a scammer.

Everything started to change for Pauline after she suffered an unfortunate fall. She was admitted first to the hospital, and then to a rehabilitation and nursing facility upon the request of a family member who said they could no longer care for her. Her acceptance to a nursing home triggered a review of her finances by Medicaid that revealed that her bank account had been almost depleted. Fortunately, a social worker referred Pauline to our office, and CELJ staff investigated and worked to revoke decision making authority from those who betrayed her trust. Today Pauline is living with her daughter Tanya, who together with her wife Tina, were appointed by CELJ to serve as Powers of Attorney and Health Care Proxies for Pauline. Tanya told us that she was incredibly grateful to “make sure my mother’s voice is heard, and her rights are protected.”
Other Services: Overview

CELJ has a robust community legal education program and very active social media presence and an interactive website. Our goal is to expand and improve legal services to older adults and their families and to use the legal system, so our clients can age independently and with dignity. Our target population is older adults and their families and we develop strategies that will meet all of the various communities of older adults that exist (immigrant, LGBTQ, communities of color, younger and healthy individuals, those in institutions and the homebound). Last year we held 128 community events and had 61,218 visits to our website with 778 downloads. Although we do not have on-line intake, we receive weekly Facebook and Instagram requests for services which are responded to within 24 hours. In addition, our Surrogate’s Court Help Desk (detailed in the section on pro bono assistance) is designed to give short consultations so that individuals can appear in Surrogate’s Court pro se.

One strategy we use to achieve our goal is through policy and systems change advocacy at the national and state levels. CELJ is unique in that we engage in systems advocacy specifically on behalf of older adults. We have a Policy Director who regularly weighs in on proposed legislation and testifies at NYS Assembly and Senate Hearings on issues such as safe staffing, Medicaid and elder abuse. We believe in advocating, not only for our clients, but for the rights of all New Yorkers who are impacted by outdated or unfair policies. As a result, our staff works closely with legislators and policy makers to provide unbiased testimony and analysis on relevant laws that impact older adults. This is done through white papers, testimony and comments on proposed legislation. Increased IOLA support has enabled us to increase our advocacy efforts, particularly around safe staffing in nursing homes and advocacy with the New York Department of Health to be more aggressive in improving quality of care in facilities.

Number of People who Benefitted from Services Other Than Direct Legal Representation

| Service                      | Benefitted
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<tbody>
<tr>
<td>Community Legal Education</td>
<td>147,262</td>
</tr>
<tr>
<td>Pro Se Assistance</td>
<td>1,624</td>
</tr>
<tr>
<td>Online Assistance</td>
<td>778</td>
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149,664 People Benefitted by Services Other Than Direct Legal Representation
Other Services: Technology and Other Innovations

CELJ has made updates to its Legal Advice Helpline during the grant period. These updates include migrating to Legal Server to distribute and track Helpline callback requests from potential clients, updates to the Helpline Legal Services Manual, and plans to upgrade the technology infrastructure of the Helpline to better support statewide service provision. By using Legal Server to track callback requests, the Helpline can collect better data on the number of requests that successfully generate direct legal services and the speed with which callback requests are returned. The Helpline Coordinator can use the Legal Server tracking to ensure that callback requests are being distributed appropriately to Helpline personnel and can quickly redistribute based on workload and personnel schedules. Updates to the Legal Services Manual include changes in substantive legal content and changes in referral information for legal services agencies outside of CELJ’s full-scope service geographic footprint. These updates will allow Helpline attorneys to continue to give the most accurate legal information and advice. The referral information will allow Helpline attorneys to better refer clients outside of CELJ’s full-scope service geographic footprint when they are in need of legal services beyond the limited scope of Helpline representation. Finally, CELJ has begun preliminary designs for migration of the Legal Services Manual to an online, searchable database format as well as updates to the telephone infrastructure. These updates, when completed, will allow Helpline attorneys to more quickly serve clients all over New York State by creating shorter wait times, fewer dropped calls, and easier access to statewide information.

Other Services: Trainings

During this reporting period, we hired a consultant to reorganize and revitalize our board and held our first ever board retreat. As a result, we added new board committees, removed stagnant committees and changed committee composition and leadership that had stagnated. Since the retreat, the board has been more engaged and driven and board contributions (and help with fundraising) have improved.

We continue to invest in our supervisors, providing them with leadership training they need in order to be contributing members of the management team. Although we saw the potential for these people to be great leaders, we knew that additional training would be needed. Each supervisor completed an intense development training with an executive career coach. As part of the program, they completed “360” assessments and participated in many one-on-one sessions with the coach, where they developed any weaknesses or areas of needed improvement. We also maintain a relationship with the coach for additional sessions as needed.
Other Services: Trainings

We have an internal diversity committee led by staff. The committee, alongside HR, has done a great job promoting awareness with office celebrations, hosting an internal training on implicit bias, given by our own staff members and even scheduling roundtable discussions or “safe spaces” to discuss current events and to support staff in light of recent times. In addition, we are currently in talks regarding a contract with The Pivotal Paradigm Project, which is a global full-service consulting firm specializing in diversity, equity, and inclusion (DEI). Their customized services include board equity development, small group, team, and executive (1-on-1) coaching, workshops/trainings, frameworks/program design, and organizational strategy.

Pro Bono Volunteer Involvement

Our volunteers and pro bono attorneys typically assist in one of the following programs:

- Full Scope Matters: Private attorneys handle full-scope representations from inception to completion, in issues such as social security disability, bankruptcy, divorce, estate administration and advanced directives, property transfers and more. This service expands CELJ’s capacity to provide legal services in areas of law that exceed the agency’s practice areas and legal expertise. From 4/1/2021 to 3/31/2022, CELJ had 49 open active cases in its full scope program.

- Limited Scope Matters: From 4/1/2021 to 3/31/2022, the following limited scope representation opportunities were offered by our agency:
  - Free Senior Legal Advice Helpline – 1 volunteer attorneys spent 220 hours.
  - Surrogate’s Court Help Center – 15 volunteer attorneys spent 154 hours.

- In-House support: Attorney Emeritus Program volunteers and law students assist our staff attorneys by providing case support, research, writing, and provision of legal services to clients.
  - Attorney Emeritus Program – 4 AEP volunteers spent 340 hours.
  - Law Students – 12 students spent 2,075.95 hours.

85 Attorneys volunteered 716 hours

12 Law Students volunteered 2,075 hours
Significant Collaborations

The Erie County Landlord/Tenant Hub Court was created in December 2021 as a vehicle to ensure that all tenants facing eviction throughout the county have an opportunity to be represented by counsel at their hearings. The program was enacted to bridge the justice gap for those tenants on the outskirts of the county who may not otherwise have access to representation. All evictions filed in town and village courts throughout the county are transferred to the Hub Court housed in Buffalo City Court. All appearances are virtual so that tenants do not have to travel long distances for their case to be heard. Neighborhood Legal Services, the Center for Elder Law & Justice, the Erie County Bar Association’s Volunteer Lawyer’s Project, the Legal Aid Bureau of Buffalo and the Western New York Law Center have attorneys present virtually for all Hub Court appearances so that tenants in need of representation can be quickly linked. Though eviction filings have skyrocketed, in large part due to the expiration of New York State’s eviction moratorium, the legal services providers have been able to meet the need and provide representation for all eligible tenants throughout the county.

The project has a central intake number that tenants in all five counties can call for representation, staffed by all legal services providers on a rotating basis. Our staff is able to handle both virtual appearances through the Erie County Hub Court as well as any in-person appearances scheduled in the other four counties served by this program. We have been able to extend our reach to provide representation to tenants in a way that we have never been able to before through this program. This is another effort from legal services providers in Western New York to combat the homelessness crisis by providing in-depth representation to tenants facing eviction.

CELI’s Elder Abuse Prevention unit collaborates with Center for Resolution and Justice, a restorative justice mediation agency, and Neighborhood Legal Services, a legal services agency, for an innovative partnership to assist victims of crime of all ages. The Crime Victim Justice Project, provides access to justice for crime victims in our community through legal services and restorative justice approaches. The project spearheaded a working group to assist victims of domestic abuse through family court. Emergency family offense petitions were not being heard promptly, as required under law. After collaborating with other agencies, a working group comprised of DV attorneys and advocates was formed to remedy this issue. The group’s advocacy led to the involved agencies including statutory language into every family offense petition, stating that it is a guarantee under law that emergency offense petitions must be heard the same day as filing, or next day if necessary. Including statutory language into petitions was successful, and now all emergency petitions are timely heard.
## Sources of Funding

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