## Moving Towards Civil Gideon

2014 Legal Assistance Partnership Conference



September 10-12, 2014 **The Albany Marriott**189 Wolf Road, Albany, New York



## **Important Information**

#### Welcome to Albany

The New York Bar Association is pleased to host the 2014 Partnership Conference. The Conference is co-sponsored by the Committee on Legal Aid and the Department of Pro Bono Affairs of the New York State Bar Association. The theme of this year's Conference is "Moving Towards Civil Gideon." The 2 ½ day conference will feature 30 workshops – many of which are MCLE accredited – in critical areas of law affecting low-income and vulnerable populations.

The Conference has grown substantially since 2012 and we would like to extend our gratitude to all attendees for making this the premier legal services conference in New York.

#### **Directions to the Albany Marriott**

FROM NORTH: I-87 South (Northway) to Exit 4. At end of exit turn left onto Old Wolf Road. Continue on Old Wolf Road to end and turn left onto Albany Shaker Road. At next light turn right onto Wolf Road. Hotel is ahead 1/2 mile on left. Directly across from Olive Garden Restaurant (on right).

FROM SOUTH: Travel I-87 (NYS Thruway) to Exit 24. Exit toll booth and continue for 100 yards and join I-87N (Northway) at Exit 1N. Follow I-87N for 3 miles to Exit 4 (Wolf Road-Albany Airport). At foot of exit take a right at light onto Wolf Road. The Albany Marriott will be 1/2 mile on the left.

FROM EAST: Travel I-90 West to Exit B1 (alternate Route 90). Continue on I-90 for 15 miles to Exit 1N (I-87N) Exit 4 (Wolf Road). Bear right leaving exit and turn right onto Wolf Road. Hotel is ahead 1/2 mile on left.

FROM WEST: NYS Thruway (I-90 East) to Exit 24. Exit toll and join I-87N (Northway) Exit 1N. Continue on I-87N for 3 miles to Exit 4 (Wolf Road). Bear right leaving exit and turn right onto Wolf Road. Hotel is ahead 1/2 on left.

FROM ALBANY COUNTY AIRPORT: Bear left at first light leaving terminal, turning onto Albany-Shaker Road. Proceed east to Wolf Road, turn right (5th light). Hotel is 1/2 mile ahead on left. Taxi service and rental cars are available at the Airport, or use the courtesy phone at the baggage claim for complimentary shuttle service.

FROM AMTRAK STATION: (Rensselaer): Leaving terminal, bear left 3 times, following signs to I-787N to I-90 West to I-87 North Exit 4 (Wolf Road). Bear right leaving exit and turn right onto Wolf Road. Hotel is ahead 1/2 mile on left. Taxi service is available at the train station.

Accommodations for Persons with Disabilities: NYSBA welcomes participation by individuals with disabilities. NYSBA is committed to complying with all applicable laws that prohibit discrimination against individuals on the basis of disability in the full and equal enjoyment of its goods, services, programs, activities, facilities, privileges, advantages, or accommodations. To request auxiliary aids or services or if you have any questions regarding accessibility, please contact Dannielle Hille at dhille@nysba.org.

## **Mandatory Continuing Legal Education**

#### MCLE Minimum Requirements for New York Attorneys

For the most comprehensive choice of CLE program topics and convenient locations, no other New York State organization can match the New York State Bar Association. For more than 50 years, we have been providing the finest legal educational programs in New York State.

Newly admitted attorneys must complete a minimum of 32 credit hours of accredited transitional education within the first two years after admission to the Bar. In each of the first two years, 16 accredited hours must be completed as follows: 3 hours of ethics and professionalism; 6 hours of skills; 7 hours of law practice management and areas of professional practice.

All other attorneys must complete a minimum of 24 credit hours of accredited continuing legal education each biennial reporting cycle in ethics and professionalism, skills, law practice management or areas of professional practice. Of the total, at least 4 credit hours must be in ethics and professionalism. The biennial reporting cycle is the two-year period between the dates of submission of the attorney's biennial registration statement.

## **Moving Towards Civil Gideon**



n behalf of the Committee on Legal Aid of the New York State Bar Association, welcome to the 2014 Partnership Conference: "Moving Towards Civil Gideon." We are at an exciting time in the "Civil Gideon" movement to create a right to counsel in civil matters that involve basic life necessities such as housing and food.

At the state level every year for the last four (4) years Chief Judge Jonathan Lippman, along with the New York State Bar Association, and the Chief Judge's Task Force on Civil Legal Services have held hearings on the need for funding for civil legal services for the poor. Since the Task Force's inception, state funding for civil legal services has increased to 70 million. This has been a tremendous resource for legal services and pro bono programs statewide, especially in light of decreasing federal and foundation funding for these programs. Across the state, on a local level, progressive movements have taken hold, leading to increased resources for civil legal services

programs. Of course, we still have a long way to go to achieve true Civil Gideon; but, as they say, the wind is beneath its sails, and we are continuing the inexorable march towards destiny.

This conference is our opportunity to come together, celebrate our successes, and plan collectively about how to best move forward to achieve the goal of Civil Gideon. It will also present us with many practical, immediate opportunities to improve, enhance and expand the services we provide to our communities through committee and affinity group meetings, and a plethora of CLE workshops offered throughout the conference. It is also our chance to network and have fellowship with colleagues from across the State, who we sometimes only see at the Partnership Conference every two years.

For the first time since this conference was started in 1994, it was sold out by the end of July, with close to 650 registrants. The unprecedented success is due to the collective efforts of many who helped create what has become the premiere legal services CLE program in the state. First, many thanks to NYSBA for its generous support of this event; every two years, NYSBA significantly underwrites this conference to help facilitate the development and growth of the non-profit organizations providing legal assistance to low-income New Yorkers.

I also wish to thank Lewis Creekmore, Esq., who worked with me through much of the planning for this year's conference before leaving Legal Services of the Hudson Valley for a position with the Legal Services Corporation; the members of the 2014 Partnership Conference Steering Committee, for their efforts to construct and produce this conference; our colleagues who submitted proposals for workshops; the review teams who analyzed the proposals; and the teams of presenters who have put in time, effort and commitment so that we can all benefit.

I am happy to announce that we will have two exciting featured speakers for the conference. Our opening plenary will be a conversation with one of our greatest advocates for equal access, the Honorable Jonathan Lippman, Chief Judge of the State of New York, which will be moderated by longtime Civil Gideon advocate Andrew Scherer, Esq. Additionally, the Keynote for our awards dinner will be the Honorable Steven Banks, Commissioner, NYC Human Resources Administration, and former Attorney-In-Chief, The Legal Aid Society. We are exceptionally fortunate and honored to have these two lions of the civil justice community join us for the conference; I know they will inspire with their words, their commitment, their energy, and their devotion to our cause of equal access to justice for all.

I want give a special thanks to NYSBA's Pro Bono Department, Gloria Herron Arthur, Esq., Director, and Dannielle Hille, Assistant. Gloria and Dannielle spent many hours coordinating this conference, assembling all of the many pieces that contributed into the seamless event you will experience over the next three days. Thanks to them, it is an integral whole.

Please enjoy, learn something new, and, most important of all, have fun!

Edwina Frances Martin, Esq.

Chair

2014 NYSBA Partnership Conference

Edu France Martin

# A Word of Thanks

This conference would not have been possible without the hard work, dedication and enthusiasm of the legal services attorneys who took the time to submit workshop proposals covering a wide range of important poverty law topics. Although we sincerely wish we could have accepted each of the 65 proposals, time and space constraints mandated that we limit the conference to only 30 workshops. Ultimately, the difficult task of selecting the 30 workshops fell to the Steering Committee and the members of the dedicated Review Teams.

The Review Teams consisted of some of the leading practitioners in poverty law. Thanks to the Review Team members' collective knowledge and legal experience, we were able to select interesting, relevant and cutting-edge legal workshops. Review Team members are listed on page 22 of the brochure.

We also extend our sincere thanks to the Steering Committee members who worked on re-vamping the RFP process; collaborated with the Review Teams in the workshop selection process; coordinated the conference schedule; and guided panelists through the rigorous CLE accreditation process. The members of the Steering Committee are listed below.

When you see a member of the Steering Committee or Review Team, please take a moment to thank her or him. Their hard work and commitment are responsible for making the Partnership Conference the "premier legal services conference in New York."

Lewis G. Creekmore
Harvey Epstein
Anne Erickson
Christine M. Fecko
Gloria Herron Arthur
Dannielle Hille
Jeff L. Hogue
Joseph Kelemen
Cynthia B. Knox

Edwina Francis Martin
Alice Morey
Sateesh Nori
Carla Palumbo
C. Kenneth Perri
Louis Prieto
Runa Rajagopal
Mary M. Withington
Tanya E.M. Wong

## Agenda at a Glance

### Wednesday, September 10

10:00am - 1:30pm Joint Meeting and working lunch of NYSBA Committee on Legal Aid (COLA) President's

Committee on Access to Justice (PCAJ), Pro Bono Coordinators Network, and the NY Project

**Directors** 

1:30pm - 4:45pm **Affinity Group Meetings** [unless otherwise specified]

Welfare Task Force\* [10:00am – 5:00pm]

Disability Advocacy Project Task Force\* [1:00pm – 5:00pm]

Family Law/Domestic Violence [1:30am – 6:30pm]

Pro Bono Coordinators Network

Health Law\*

NYS Legal Services Association

Meetings marked with an (\*) will be held at the New York State Bar Association located at 1 Elk Street, Albany, NY

4:45pm - 5:00pm **Break** 

5:00pm - 6:00pm LawHelp Stakeholders Forum

Diversity Task Force

New York Immigration Assistance Consortium (NYIAC)

### **Thursday, September 11**

7:00am - 4:00pm Registration

7:30am - 8:30am Continental Breakfast

8:30am - 9:45am Welcome by NYSBA President Glenn Lau-Kee and Opening Plenary

A Conversation with Chief Judge Lippman about Civil Gideon and Access to Justice

9:45am - 10:00am **Break** 

**Thursday Morning Workshops** 10:00am – 1:15pm

#### ACA/Medicaid

o A. Medicaid in 2014: Impact of Federal and State Reform

#### **DAP**

- From Childhood to Adult: An Overview of SSI Age 18 Reviews o E.
- Typical Mental Impairments in Young Adult SSI Claims

#### Foreclosure & Housing

- o L. Understanding the Basics of the New York State Foreclosure Process A General Overview for Non-Foreclosure Defense Attorneys
- o M. Avoid Foreclosures Through Chapter 13 Bankruptcy Plans

#### **Domestic Violence/Family**

- o P. Cornerstone Advocacy: An Interdisciplinary Approach to Working with Families
- o S. Economic Issues and Family Law: Navigating the Intersections of Consumer, Family, Bankruptcy and Foreclosure Laws

#### **Program Improvements**

- o W. The Future of Technology in the Effective Delivery of Legal Aid
- o X. A Landscape Redefined: Governance and Management Changes in New York

## Agenda at a Glance

1:15pm - 2:45pm Lunch and Networking

Remarks: Carla Palumbo, Past Board Member, TNYBF

**Presentation:** Diversity in Law School and Legal Services: How are we doing?

2:45pm - 3:00pm Break

3:00pm - 6:15pm **Thursday Afternoon Workshops** 

#### **Benefits**

o C. Meeting a Client's Immediate Needs: An Intensive Treatment of Emergency and One-Time Assistance

#### Foreclosure & Housing

- o N. Preservation Issues in HUD Subsidized Housing
- o O. Low Income Housing Tax Credit Developments: Issues in the Identification of the Unique Occupancy and Eviction Requirements of those Developments and Strategies for Representing Occupants of LIHTC Housing

#### • Domestic Violence/Family

- o Q. The Color of a Bruise: Addressing Racial Inequalities in Legal Protection for Victims of Bruising Injuries
- o R. The Ethics and Practice of Representing Indigent Respondents in Child Support Cases

#### • Program Improvements

o U. Community Lawyering: Sharpening Our Theory & Developing Our Toolbox

#### • Pro Bono/Pro Se

o Z. Using Business Law and Partnerships with Pro Bono Attorneys to Assist Small Businesses and Non-Profit Organizations in Order to Improve the Quality of Life of Individuals in Low-Income Neighborhoods

#### Other

o AC. Tax 101 for the Legal Services Practitioner

6:15pm – 6:30pm Break

6:30pm - 7:15pm Denison Ray Awards Reception

7:15pm – 9:00pm Denison Ray Awards Dinner

Keynote Speaker: Hon. Steven Banks, Commissioner, NYC HRA

### Friday, September 12

Continental Breakfast 8:00am - 9:00am

9:00am – 12:15pm Friday Morning Workshops

#### **Benefits**

o B. Intentional Program Violations, Administrative Disqualification Hearings, and Related Welfare/SNAP Fraud Issues

#### DAP

- o G. Problems Proving Vocational Issues in Young Adult Disability Claims
- o H. Proving Young Adult Disability Claims: Mock Hearing

#### **Diversity**

- o I. Immigrant Eligibility for Public Benefits in New York State: New Developments & Review of the Basics
- Beyond Lay Reform: Building a Practice that Meets the Needs of Lesbian, Gay, Bisexual and Transgender Clients

## Agenda at a Glance

#### Other

o AD. Criminal Law for the Civil Practitioner: Bridging the Gap between Arrest and Reentry to Work Towards Holistic and Transformative Delivery of Direct Legal Services

#### Pro Bono/Pro Se

- Cultivating Pro Bono Leaders
- o AA. Filling in the Gap: Using Non-Lawyers to Educate & Assist Pro Se Litigants

12:15pm – 1:15pm Lunch and Networking

1:15pm – 1:30pm Break

Friday Afternoon Workshops 1:30pm - 3:00pm

- Consumer
  - o D. Defending and Assisting Consumers in Debt Collection Lawsuits
- Diversity
  - Breaking Down the Barriers of Language Access o **K**.
- **Program Improvements** 
  - It Will Happen to Us All: An Essential Guide to Delivering Disaster Legal Aid
  - o **T.** Effective Legislative Advocacy for Lawyers and Advocates
- - o AB. Implementing Federal Rights: The American Private Enforcement Model

## **Special Programs**

## Wednesday, September 10

Affinity Group Program Descriptions

10:00am - 1:30pm Joint Meeting

Room: Empire

Joint Meeting of the NYSBA Committee on Legal Aid and President's Committee on Access to Justice

10:00am – 5:00pm Welfare

Room: OFFSITE- New York State Bar Association Great Hall

1:00pm - 5:00pm DAP

Room: OFFSITE- New York State Bar Association Peck Room

#### **State-Wide DAP Task Force Meeting**

The DAP Task Forces will hold a state-wide meeting from 1:00pm – 5:00pm on Wednesday, September 10, 2014. The agenda will include a presentation by OTDA on the upcoming state takeover of the State Supplement Program (SSP) portion of SSI. A representative from SSA will participate. There will also be a presentation on various post-entitlement issues in young adult cases, including continued eligibility for benefits under "Section 301," SSI's various vocational and work incentive programs, Medicaid eligibility, and SSI overpayments. New and proposed regulations and new developments and trends in case law will be discussed as well.

1:30pm - 4:45pm

**Health Law** 

Room: OFFSITE- New York State Bar Association Lawyers Lounge

**NYS Legal Services Associations** 

Room: State

**Pro Bono Coordinators Network** 

Room: Albany/Colonie

1:30pm - 6:30pm

Family/DV

Room: Salon E

5:00pm - 6:30pm

LawHelp Stakeholders Forum

Room: Albany/Colonie

Is the Digital Divide Dead?

90% of all U.S. adults have a cell phone – what percent with household income below \$30,000 have a smart phone? (a) 25% (b) 37% (c) 47%. Come to LawHelpNY's Stakeholders' Forum for the answer and additional demographic data that will demonstrate why and which tech strategies are essential for improving access to justice for low-income New Yorkers.

**Diversity Task Force** 

Room: Albany/Colonie

**New York Immigrant Assistance Consortium** (NYIAC)

Room: Schenectady/Troy

## Thursday, September 11

Special Sessions

8:45am – 9:45 am Opening Plenary

Room: Salon DE

A Conversation with Chief Judge Jonathan Lippman about Civil Gideon and Access to Justice Chief Judge Jonathan Lippman, the featured speaker at the Opening Plenary session, will answer questions posed by Moderator Andrew Scherer. Esq., a well-known legal servic-

es advocate, about Civil Gideon and access to justice issues.

1:15pm – 2:45pm Luncheon Presentation

Room: Salon DE

Diversity in Law School and Legal Services: How are we doing?

African American Law Students at UCLA Law School made a video about their experience in their school. We will show the video and discuss the issues raised in the video, their relevance to the legal services community and discuss a statewide plan to respond to the issues raised.

Presenters:

Harvey Epstein – Urban Justice Center

Lillian Moy – Legal Aid Society of Northeastern New York

## **Special Programs**

## 6:30pm - 9:30pm

## **Denison Ray Reception and Awards Dinner**

Room: Ballroom Foyer and Grand Ballroom



**Banks** 

#### Keynote: Hon. Steven Banks, Commissioner of the NYC Human Resources Administration

Appointed by New York City Mayor Bill de Blasio to head the Human Resources Administration, Commissioner Banks is well known in the legal services community, having served as the former Attorney-in-Chief of the New York City Legal Aid Society, the oldest and largest legal services organization in the country.

A career public interest attorney and advocate on behalf of low-income and vulnerable New Yorkers, Commissioner Banks will share his reflections on the role of government in addressing poverty from the perspective of someone who has moved from advocating for policies to being responsible for making and implementing them.

## **Thursday, September 11**

**Morning Sessions** 

#### 10:00am - 1:15pm

#### A. Medicaid in 2014: Impact of Federal and State Reform

3.5 MCLE Credits: 3.5 Professional Practice

Room: Salon FG

This workshop will cover the aspects of health care reform that most impact low-income New Yorkers, particularly vulnerable populations including immigrant communities and communities of color as well as persons with disabilities. Among other things, the workshop will explore provisions of the Affordable Care Act such as Medicaid expansion, the state health insurance exchange, affordability assistance and non-discrimination and examine the promises these provisions offer as well as explore the challenges that are faced by New Yorkers in need. It will also review the New York State Medicaid Redesign Team's reforms focusing on transitions from a fee-for-service model to a managed care model for long term care services and behavioral health services.

#### **Panelists:**

Rebecca Antar Novick, Esq., Supervising Attorney, Health Law Unit, The Legal Aid Society

Christine Chiu, Esq., Staff Attorney, Health Justice Program, New York Lawyers for the Public Interest

Belkys García, Esq., Staff Attorney, The Legal Aid Society

Geoffrey A. Hale, Esq., Senior Health Law Attorney, Empire **Justice Center** 

Linda R. Hassberg, Esq., Senior Staff Attorney, Empire **Justice Center** 

Orier Okumakpeyi, Esq., Staff Attorney, MFY Legal Services, Inc.

Carol Santangelo, Esq., Staff Attorney, Health Law Unit, The Legal Aid Society

Rebecca Wallach, Esq., Staff Attorney / Skadden Fellow, Evelyn Frank Legal Resources Program, New York Legal Assistance Group

#### 10:00am - 11:30am

#### E. From Childhood to Adult: An Overview of SSI Age 18 Reviews

1.5 MCLE Credits: 0.5 Ethics; 1.0 Professional Practice

Room: Salon C

Social Security's regulations mandate that children who are found disabled under the SSI Childhood Disability criteria must have their SSI claims reviewed under the adult disability criteria when they turn 18. If SSA determines that an 18 year old does not meet the adult criteria, his/her benefits will be discontinued, subject to appeal. These claims present unique procedural and substantive issues, with which many advocates – both experienced and relatively new to the practice – are unfamiliar. This session will lay out the statutory and regulatory framework for analyzing young adult claims. It will include a discussion of some of the ethical issues that arise, such as who is the client – parent or young adult? It will also consider ethical complications when the client has diminished capacity, or is not cooperative. The presenters will introduce the types of evidence necessary to prove young adult claims, with an emphasis on school and special education records.

#### **Panelists:**

Bridgit M. Burke, JD, Co-Director, Albany Law Clinic & Justice Center, Albany Law School

Shubh Nigam McTague, Esq., Staff Attorney, Legal Aid Society of Northeastern New York, Inc.

Louise M. Tarantino, Esq., Senior Attorney, Empire Justice Center

#### L. Understanding the Basics of the New York State Foreclosure Process - A General Overview for Non-**Foreclosure Defense Attorneys**

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon B

This workshop will cover the basics of the NY residential foreclosure process and basic foreclosure defenses and solutions. The focus will be on the basics of foreclosure for the legal services attorney who may have clients facing foreclosure. This workshop will enable the attorney to guide his/ her clients through foreclosure timelines, the expectations from the bank and court, the expectations for the homeowner and identify where the homeowner can seek professional assistance for free.

#### **Panelists:**

Rebecca Caico, Esq., Senior Attorney & Regional Coordinator, Western/Central NY, HOPP Anchor Partner Program, Empire Justice Center

Rose Marie Cantanno, Esq., Supervising Attorney, Foreclosure Prevention Project, New York Legal Assistance

Jacob Inwald, Esq., Director of Foreclosure Prevention, Legal Services NYC

#### P. Cornerstone Advocacy: An Interdisciplinary Approach to Working with Families

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon H

This program will provide an overview of pertinent law, regulations and advocacy strategies directed to speed reunification of families with children in foster care. The program will describe strategies for attorneys and social workers to promote appropriate and meaningful service plans, placements, participation in conferences, and visitation. It will also provide practice tips for solo practitioners and attorneys who work with social workers.

#### **Panelists:**

Richard Barinbaum, LMSW, Social Work Supervisor, Center for Family Representation, Inc.

Christine Zielinski, Esq., Litigation Supervisor, Center for Family Representation, Inc.

#### W. The Future of Technology in the Effective **Delivery of Legal Aid**

1.5 MCLE Credits: 1.5 Law Practice Management

Room: Albany/Colonie

Today cases are won and lost, and funders can be wowed or worried by how effectively a program uses technology to reach clients and efficiently manage operations. We can build a bridge to a tech future that keeps the best of legal services while increasing our effectiveness using technology. Our panel will distill useful information about how our justice community currently uses technology, both in New York and in other states. Learn about national developments in the innovative use of technology, and what you need to know from the LSC Tech Summit, the ABA Law Office Technology Report, and the LSC Tech Baselines. Then we will dive into the technology used by your peers in New York, highlight the Chief Judge's Task Force tech report, and provide examples of effective NY projects. With that information in mind, the panel will describe how to plan for technology projects, provide tech training tips, and describe exciting opportunities technology provides for coordination.

#### **Panelists:**

Christine M. Fecko, Esq., General Counsel, IOLA Fund of the State of New York

John T. Greiner, JD, Chief Information Officer, Legal Services NYC

Anne Hineline, Technology Coordinator, Legal Assistance of Western New York, Inc.

Jeff L. Hogue, Esq., Community Relations and Operations, LegalServerTM

#### 11:45am - 1:15pm

#### F. Typical Mental Impairments in Young Adult SSI **Claims**

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon C

Disability claims involving young adults with mental impairments can be particularly challenging for advocates. Advocates must have a basic understanding of the typical psychiatric diagnoses confronted by young adults in order to work with the young adult claimants and develop evidence to support their claims. In this session, a psychologist, in conjunction with an experienced advocate, will explore typical diagnoses from the psychiatric perspective. The psychologist will update advocates on the significant changes in the latest edition of the American Psychiatric Association's Diagnostic and Statistical Manual (DSM), especially as they relate to young adult claims. The psychologist and facilitator will also address how the psychiatric profession and SSA view Global Assessment of Functioning (GAF) scores in these cases. Finally, the presenters will suggest ways in which the subtest scores from formal intelligence tests can be used to demonstrate vocational limitations in young adult cases, and to compensate for the lack of relevant vocational issues in typical young adult cases.

#### **Panelists:**

Catherine M. (Kate) Callery, Esq., Senior Attorney / DAP Coordinator, Empire Justice Center

Katrina H. Colistra, PsyD, NYS Licensed Psychologist/ Partner, New Paradigm Psychological Services, PLLC

#### M. Avoid Foreclosures through Chapter 13 **Bankruptcy Plans**

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon B

Chapter 13 is a form of bankruptcy which provides up to 5 years for a homeowner to pay off mortgage arrears. It also provides comprehensive financial relief. This may include canceling second mortgages, stopping garnishments, canceling most amounts owed on medical bills and credit card debt, and reducing the amount owed on used car loans. In most bankruptcy courts in New York State, Chapter 13 may be combined with loss mitigation procedures for modifying mortgages.

Chapter 13 is a type of bankruptcy in which the homeowner or consumer files a 3 to 5 year plan. This is in contrast to a Chapter 7 proceeding, which liquidates debts and typically lasts only 3 or 4 months. The filing of a Chapter 13 automatically stops a foreclosure. Until the Chapter 13 case is decided all proceedings must be filed in bankruptcy court. After filing a Chapter 13 petition, the Court will review the homeowner's Chapter 13 Plan. In many bankruptcy courts, the homeowner may initiate loss mitigation review procedures, similar to settlement conferences in state court.

The panel will discuss procedures for homeowners simultaneously filing a Chapter 13 proceeding and seeking modification of their mortgage. The panel will include Hon. Robert E. Littlefield, Jr., Chief Judge of the Bankruptcy Court of the Northern District of New York (NDNY). He will discuss the innovative NDNY loss mitigation program for Chapter 13 debtors who are seeking a mortgage modification. The panel also includes Peter M. Frank, Senior Attorney at Legal Services for the Hudson Valley. He will discuss the loss mitigation program in the Southern District of New York (SDNY) and adversary proceedings in bankruptcy, which may be used to challenge the standing of the lender to file a foreclosure and which can be a vehicle for raising consumerrelated claims.

#### Panelists:

Peter M. Frank, Esq., Senior Attorney, Legal Services of the **Hudson Valley** 

Kirsten E. Keefe, Esq., Senior Staff Attorney, Empire Justice Center

Hon. Robert E. Littlefield, Jr., Chief Judge, U.S. Bankruptcy Court, Northern District of New York (NDNY)

Mark H. Wattenberg, Esq., Attorney, Legal Assistance of Western New York, Inc.

#### S. Economic Issues and Family Law: Navigating the Intersections of Consumer, Family, Bankruptcy and **Foreclosure Laws**

1.5 MCLE Credits: 1.5 Professional Practice

Room: Albany/Colonie

This workshop will provide an overview of economic issues facing individuals when they separate or divorce, with a focus on domestic violence survivors. Legislation was just enacted adding economic crimes to the enumerated offenses that allow one to be granted an order of protection. This change in the law highlights the economic difficulties clients face when relationships end, especially relationships where domestic violence was a factor. Parties can be brought into Family Court, Supreme Court or Civil Court; as well as have a looming foreclosure all simultaneously.

This workshop will discuss the legislation, as well as the interaction of various areas of law and how they come into play in a family or matrimonial matter. Attendees will come away with an understanding of consumer debt, how best to protect your client when faced with a consumer action, and how to stop harassing collections calls. Credit reports and the effects of a credit report and score on one's future will also be discussed. Finally, there will also be discussion of the impact of foreclosure proceedings in a matrimonial matter, as well as mechanisms available to allow homeowners to keep their houses.

#### **Panelists:**

Kevin Purcell, Esq., Supervising Attorney, Foreclosure Prevention Unit, Empire Justice Center

Laura A. Russell, Esq., Supervising Attorney, Family Law/ Domestic Violence Unit, The Legal Aid Society

Matthew Schedler, Esq., Supervising Attorney, CAMBA Legal Services, Inc.

X. A Landscape Redefined: Governance and Management Changes in New York Law

1.5 MCLE Credits: 1.5 Professional Practice

Salon: Salon H

Several recent changes in New York Law will significantly affect the management and governance of New York notfor-profit corporations and other entities that receive funding from the State of New York. Effective July 1, 2014, the Nonprofit Revitalization Act will implement the first comprehensive reform of New York's Not-for-Profit Corporation Law in forty years. This new law brings many changes in how New York corporations must handle interested party transactions, their annual audit process, and many, many other aspects of their governance. Organizations must also comply with Executive Order 38 limiting executive compensation and administrative expenses paid by nonprofits, including legal services providers that receive funding from any of eleven designated New York State agencies. Also, beginning in July 2013, the process for applying for funding from state agencies has been revamped, and those seeking funding must "pre-qualify" and have in place numerous governance and management policies in order to be eligible for that funding. Together, all of these changes have brought about the most dramatic changes that New York nonprofits, including legal services providers, have faced in decades. In order to become legally compliant and remain eligible for important funding, the managers of legal services providers must understand how these new rules impact the governance and management of their organizations.

#### Panelists:

Courtney Darts, Esq., Senior Staff Attorney, Pro Bono Partnership

Linda Schechter Manley, Esq., Legal Director, Lawyers Alliance for New York

## **Thursday, September 11**

Afternoon Sessions

#### 3:00pm - 6:15pm

C. Meeting a Client's Immediate Needs: An **Intensive Treatment of Emergency and One-Time** Assistance

3.0 MCLE Credits: 3.0 Professional Practice

Room: Salon FG

This workshop will provide an intensive treatment of emergency assistance benefits in New York State. Emergency assistance is a broad term that encompasses multiple routes to eligibility, complex conditions for its receipt, possible repayment terms, and multiple types of assistance. This training will provide concise information about eligibility determinations for Emergency Assistance for Families, Emergency Assistance for Adults, and Emergency Safety Net Assistance. It will touch on the substantive benefits available across these three categories where there are issues of: food emergency, utility emergency, rental/shelter arrears to prevent an eviction, need for temporary housing, as well as diversion payments and a multitude of special grants authorized under New York State regulations (moving expenses, storage, home repairs, restaurant allowance, and pregnancy allowance). The information will be useful to newer and more experienced attorneys who face challenges in helping their clients get basic needs met by the local departments of Social Services (LDSS) under desperate and time sensitive circumstances. These vital benefits are often some of the hardest for clients to access.

#### **Panelists:**

Saima Akhtar, Esq., Staff Attorney, Empire Justice Center Susan C. Bahn, Esq., Senior Staff Attorney, The Legal Aid Society

Diana C. Proske, Esq., Staff Attorney, Public Benefits Unit, Neighborhood Legal Services, Inc.

#### U. Community Lawyering: Sharpening Our Theory & Developing Our Toolbox

3.0 MCLE Credits: 3.0 Ethics and Professionalism

Room: Salon H

At a time of increasing disparities in wealth, attacks on social safety net programs, and ongoing funding cuts for legal services, utilizing alternative strategies to empower low-income communities is more important than ever for legal services providers. Lawyers and legal advocates have the skills to play a crucial role in supporting community movements and campaigns for justice - we can defend the right to organize, conduct know-your-rights trainings, create community-driven research, utilize traditional and social media advocacy, help win bottom-up policy changes, and represent individuals and organizations in strategic litigation. However, despite our skills and best intentions, we may find ourselves constrained by funding restrictions, in severe conflict with, working at cross purposes, or inhibiting community organizing, movements, and campaigns. In this interactive and participatory two-part workshop, participants will have the opportunity to strengthen their understanding of how to work collaboratively with community organizers and community organizations to win change.

#### **Panelists:**

Jennifer Ching, Esq., Project Director, Queens Legal Services/Legal Services NYC

Marika Dias, Esq., Managing Attorney, Make the Road New York

Reyna Ramolete Hayashi, Esq., Workers' Rights Attorney, **Empire Justice Center** 

Kate Rubin, Managing Director, Civil Action Practice, The Bronx Defenders

Purvi Shah, Esq., Director, Bertha Justice Institute, Center for Constitutional Rights

Garrett Wright, Esq., Senior Staff Attorney, Community Development Project, Urban Justice Center

Helena Wong, Member, CAAAV Organizing Asian Communities

#### 3:00pm - 4:30pm

#### Q. The Color of a Bruise: Addressing Racial Inequalities in Legal Protection for Victims of **Bruising Injuries**

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon C

When deciding who gets help, police, lawyers, and judges all look at a victim's visible injuries. However, research indicates that visual assessment of bruising injuries is extremely inaccurate. Race, age, weight, and gender all impact the appearance of a bruise, and documentation practices vary widely. Victims of color are systemically disadvantaged by visual assessment of bruising and are at greater risk of having their injuries ignored or under-prosecuted. Additionally, stereotypes of black women - the strong black woman who feels little pain and the angry black woman who is "naturally" antagonistic – impact how black women victims are viewed and treated within the legal system. The Legal Aid Society of Rochester and the University of Rochester's Laboratory of Interpersonal Violence and Victimization performed a collaborative study to learn from victims and services providers about adjudication processes for victims of color with bruising injuries. In this workshop we will share our findings, and discuss problems and solutions to advocating for victims of color with bruising injuries, including, new scientific methods of documenting injuries, what empirical evidence tells us about the color and depth of injuries, and practical approaches for improving advocacy for victims.

#### **Panelists:**

Tiffany E. Barber, PhD Candidate, Visual and Cultural Studies, University of Rochester

Lauren Deutsch, Esq., Staff Attorney, The Legal Aid Society of Rochester, New York

Z. Using Business Law and Partnerships with Pro Bono Attorneys to Assist Small Businesses and Non-Profit Organizations in Order to Improve the Quality of Life of Individuals in Low-income Neighborhoods

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon B

This workshop will identify and address common legal issues faced by small non-profit organizations and microentrepreneurs based in and serving low-income communities. Attendees will learn how a public interest law program can use transactional legal work to improve the success/ likelihood of survival of small businesses and non-profit organizations that provide essential services in low-income communities, thus strengthening low-income communities and improving the quality of life of low-income individuals. Attendees will also learn about considerations in starting a community economic development program, including staffing, eligibility guidelines and the importance of pro bono partnerships to providing quality legal assistance to small businesses, community-based organizations and community development corporations in low-income communities. The workshop will also address challenges and benefits to starting and maintaining a community economic development program.

#### Panelists:

Rolando Gonzalez, Esq., Senior Staff Attorney, Community Development Project, The Legal Aid Society

Jessica A. Rose, Esq., Director, Community and Economic Program, Brooklyn Legal Services Corporation A

#### 3:00pm - 5:00pm

#### N. Preservation Issues in HUD Subsidized Housing 2.0 MCLE Credits: 2.0 Professional Practice

Room: Salon A

Since the 1970s, HUD has assisted low income housing through a combination of project based Section 8 subsidies and mortgage subsidies and insurance. Many projects have both Section 8 and federal mortgage subsidies; others participate only in one program. The affordability of tens of thousands of these units are now threatened by the expiration of Section 8 contracts, and owners' decisions to prepay their federally insured or subsidized mortgages. Once the Section 8 subsidy or subsidized mortgage is terminated, rents rise to market levels, and tenants are protected only by the issuance of "enhanced" Section 8 vouchers. However, in recent years, HUD has begun demonstration projects for new tools for preservation. This workshop will look at the threats to HUD Subsidized Multifamily Housing, the legal tools used by practitioners to protect this vital affordable housing resources and possible new tools being created by HUD for preservation.

#### **Panelists:**

**Afua Atta-Mensah, Esq.**, Director of Litigation, Safety Net Project, Urban Justice Center

Ellen Davidson, Esq., Staff Attorney, The Legal Aid Society Edward Josephson, Esq., Director of Litigation, Legal Services NYC

#### 4:45pm – 6:15pm

#### R. The Ethics and Practice of Representing Indigent **Respondents in Child Support Cases**

1.5 MCLE Credits: 0.5 Ethics; 1.0 Professional Practice

Room: Salon C

This workshop is for attorneys who already represent or would like to represent respondents in child support cases (e.g., through the assigned counsel program). This program is also for attorneys who practice Social Security, veteran, foreclosure, and family law and the issues they should be aware of and the interconnectedness of child support issues with these areas of law.

#### **Panelists:**

Susan C. Antos, Esq., Senior Staff Attorney, Empire Justice Center

Mollie A. Dapolito, Esq., Staff Attorney, Legal Assistance of Western New York (Geneva Office)

Jeffrey M. Reed, Esq., Managing Attorney, Legal Assistance of Western New York (Olean Office)

#### AC. Tax 101 for the Legal Services Practitioner

1.5 MCLE Credits: 1.5 Professional Practice

Room: Schenectady/Troy

This workshop will introduce legal services advocates to tax law issues which have both positive and negative impacts on our clients. Tax law provides for the Earned Income Credit, the largest anti-poverty program in the United States, as well as the Premium Tax Credit, which will help underwrite the cost of health insurance for low income individuals under the Affordable Care Act. However, the complexity of the tax system poses significant obstacles to accessing such benefits, makes low income individuals dependent upon others for assistance in preparing their returns, and vulnerable to exploitation or ID theft. Tax debt and collection activity by IRS and New York State's Department of Taxation and Finance can result in levies on bank accounts, Social Security benefits, loss of driver's licenses, and bad credit ratings.

#### **Panelists:**

Sarah B. D'Alessandro, Esq., Staff Attorney, Low-Income Taxpayer Clinic, Legal Aid Society of Northeastern New York, Inc.

Elizabeth A. Hay, Esq., Attorney-in-Charge, Harlem Community Law Office, The Legal Aid Society

Anne-Marie Malak, Esq., Managing Attorney, Legal Aid Society of Northeastern New York, Inc.

#### 5:15pm - 6:15pm

O. Low Income Housing Tax Credit Developments: Issues in the Identification of the Unique Occupancy and Eviction Requirements of Those **Developments and Strategies for Representing** Occupants of LIHTC Housing

1.0 MCLE Credits: 1.0 Professional Practice

Room: Albany/Colonie

Learn about the most prevalent type of subsidized housing in the United States and New York State. This session will discuss the origins of LIHTC housing, the state and federal regulations that control its operation and what protections these regulations afford tenants. Finally, this session will also address how to identify this difficult-to-discern type of housing and provide practice tips for advocates to help tenants maintain their housing in LIHTC developments.

#### **Panelists:**

Natalie Ann Knott, Esq., Staff Attorney, Legal Assistance of Western New York

Robert R. Romaker, Esq., Managing Attorney, Legal Aid Society of Northeastern New York

## Friday, September 12

**Morning Sessions** 

#### 9:00am - 12:15pm

J. Beyond Law Reform: Building a Practice that Meets the Needs of Lesbian, Gay, Bisexual and **Transgender Clients** 

3.5 MCLE Credits: 0.5 Ethics; 0.5 Law Practice Management; 2.5 Professional Practice

Room: Salon C

We are at a crucial moment for legal services for Lesbian, Gay, Bisexual and Transgender (LGBT) people. The historical lack of legal protections for LGBT people has resulted in significant economic injustice. Indeed, LGBT people are more likely to be low income than the population as a whole and transgender people are disproportionately likely to be living in extreme poverty. Fortunately, in New York State and around the nation, the law is changing in favor of increased recognition of the civil rights of LGBT people. Low income people need access to civil legal services to enjoy the benefit of this improving legal landscape. The panel will talk about practical and substantive components of providing legal services to LGBT clients, with a focus on meeting the particular needs of transgender clients.

#### **Panelists:**

Elizabeth (Ez) Cukor, Esq., Staff Attorney, LGBT Law Project, New York Legal Assistance Group

Laurie Izutsu, Esq., Senior Staff Attorney, Immigrants' Rights and Advocacy Project, Brooklyn Legal Services

Ashe McGovern, JD, Equal Justice Works Fellow, LGBT Law Project, New York Legal Assistance Group

Elana Redfield, Esq., Staff Attorney, Sylvia Rivera Law **Project** 

Julia A. Sáenz, JD, Hanna S. Cohn Equal Justice Fellow, LGBT Rights Project, Empire Justice Center

Sonja Shield, Esq., Senior Staff Attorney, Brooklyn Legal Services

AD. Criminal Law for the Civil Practitioner: Bridging the Gap between Arrest and Reentry to Work towards Holistic and Transformative Delivery of Direct Legal Services.

3.0 MCLE Credits: 3.0 Professional Practice

Room: Salon A

In New York State, where over half a million people were arrested in 2012 and about one in three people currently has a criminal record, interactions with the police, criminal courts, and jails have become normal events for the people and communities we serve. Arrest and incarceration can trigger complex and intertwined civil legal problems. Civil legal service providers know how the myriad of non-legal social problems related to poverty - such as homelessness, addiction, unemployment, or mental illness - often lead to crime. The ensuing arrest, criminal charge, or conviction result in significant forfeitures and disabilities that only exacerbate the social problems that often lead to crime in the first place. Despite the demonstrable overlap between civil and criminal justice systems, most civil practitioners and public defenders do not talk to each other.

This workshop starts with an overview of the criminal court process, sealing laws, and certificates that promote rehabilitation. Panelist then will address how criminal cases affect jobs, housing and various benefits; and conclude with a discussion on the ways civil legal service attorneys can better bridge these gaps and more effectively address legal problems stemming from criminal court involvement to provide transformational representation.

#### **Panelists:**

Paul B. Curtin, Esq., Managing Attorney, Civil Legal Services Unit, Legal Aid Bureau of Buffalo, Inc.

Christa Douaihy, Esq., Attorney/Team Leader, Civil Action Practice, The Bronx Defenders

Mary Grace Ferone, Esq., Program Manager, Disability and Public Benefits Units, Legal Services of the Hudson Valley

Runa Rajagopal, Esq., Team Leader/Supervising Attorney, Civil Action Practice, The Bronx Defenders

Judith Whiting, Esq., General Counsel, Community Service Society of New York

#### 9:00am - 10:30am

#### B. Intentional Program Violations, Administrative Disqualification Hearings, and Related Welfare/ **Food Stamp Fraud Issues**

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon D

This training will provide an overview of the Administrative Disqualification Hearing process in the Public Assistance and SNAP benefits context. USDA issued new regulations in 2013 expanding the definition of trafficking in the Supplemental Nutrition Assistance Program (SNAP) and requiring states to monitor excessive requests for replacement cards. On the local level, counties engage in aggressive techniques to disqualify individuals from public assistance and SNAP benefits through the intentional program violation (IPV) administrative process. The unfortunate result is that recipients who had no intent to receive more benefits than they were entitled to are being improperly banned from receiving cash or food stamps, or both, which they desperately need. This workshop will provide you with the tools you need to help your clients, including an analysis of the new federal guidance on trafficking, a walk through the criminal versus civil fraud route as well as the ADH pre-and post-hearing process, and sharing of recent fair hearing decisions issued in New York City and upstate districts. Some important court decisions will be reviewed, including the Robles v. Doar class action "marriage match" case brought by the Urban Justice Center. Finally, the session will address whether advocates can (or cannot) help clients who are themselves victims of benefit theft.

#### **Panelists:**

Ian F. Feldman, Esq., Director of Legal Services, Mental Health Project, Urban Justice Center

Maryanne Joyce, Esq.

Diana C. Proske, Esq., Staff Attorney, Public Benefits Unit, Neighborhood Legal Services, Inc.

Cathy Roberts, Senior Paralegal, Empire Justice Center

#### G. Problems Proving Vocational Issues in Young Adult Disability Claims

1.5 MCLE Credits: 1.5 Skills

Room: Salon B

Social Security's regulations mandate that children who are found disabled as children have their SSI claims reviewed under the adult disability criteria when they turn 18. If SSA determines that an 18-year-old does not meet the adult criteria, his/her benefits will be discontinued, subject to appeal. On appeal, the claimant must demonstrate that s/he is unable to work, so vocational evidence is crucial to the claim. But vocational evidence typically presented in adult claims is difficult to obtain in young adult cases. This session will cover some of the unique problems with obtaining Residual Functional Capacity (RFC) evaluations for young adults. Strategies will be suggested for creative alternatives, such as testimony and evidence from non-medical sources. It will also address how school records can be used to prove inability to work in these claims. Finally, it will focus on using evidence from the claimant's childhood claim proactively to prove disability, with reference to SSA's recent Social Security Ruling (SSR) on evaluation of young adult claims.

#### **Panelists:**

Ann Biddle, Esq., Deputy Director, Queens Legal Services

Tanya Douglas, Esq., Director, Disability Advocacy Project, Manhattan Legal Services

Ellen Rita Heidrick, Esq., Supervising Attorney, Legal Assistance of Western New York, Inc.

Peter Racette, Esq., Deputy Director, Legal Aid Society of Northeastern New York, Inc.

#### Y. Cultivating Pro Bono Leaders

MCLE Credits: NONE

Room: Schenectady/Troy

In this challenging economic climate in which organizations are experiencing reductions in staffing, it is more critical than ever that all available resources be used in promoting pro bono participation, including leaders within and outside of the organization's staff. This workshop will discuss how to cultivate and engage leadership within the organization's staff and board, the local judiciary, and the bar. Panelists will offer specific examples for engaging pro bono leaders in recruitment, retention and recognition efforts.

#### Panelists:

Joseph M. Dougherty, Esq., Principal, Hinman Straub, PC

Sheila A. Hubbard, Esq., Executive Director, Volunteer Lawyers Project, Boston Bar Association

Cheryl M. Zalenski, Esq., Director, Center for Pro Bono, American Bar Association

#### 10:45am - 12:15pm

#### I. Immigrant Eligibility for Public Benefits in New York State: New Developments & Review of the Basics

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon D

This 90-minute panel will provide an overview of the rules governing immigrant eligibility for public benefits with a focus on cash assistance, SNAP, Medicaid and Qualified Health Plans offered pursuant to the Affordable Care Act (ACA). Understanding these rules is essential to legal services case handlers' ability to advocate effectively for clients, not only for public benefits lawyers but those who work in housing - where eligibility for subsidies is often dependent on qualifying immigration status; health law advocates and even immigration lawyers, who may know the complexities of immigration law but not which statuses qualify for which public benefits. In addition to reviewing basics, this workshop will cover new immigration categories (the Deferred Action for Childhood Arrivals), new benefits programs (the ACA) and changes in the way local social services districts apply the rules upstate and down, as well as litigation updates.

#### **Panelists:**

Susanna D. Evarts, Paralegal Case Handler, Health Law Unit, The Legal Aid Society

Barbara Weiner, Esq., Senior Staff Attorney, Empire Justice Center

Susan Welber, Esq., Staff Attorney, Civil Practice Law Reform Unit, The Legal Aid Society

#### H. Proving Young Adult Disability Claims: **Mock Hearing**

1.5 MCLE Credits: 1.5 Skills

Room: Salon B

Hearings involving young adult claims present unique issues for advocates. An 18-year-old whose benefits are being terminated is entitled to a hearing at the reconsideration stage, as well as a hearing before an Administrative Law Judge (ALJ). This session will address the differences and similarities between these types of hearings. It will also introduce proactive strategies to deal with issues that may arise at this type of hearing. The session also will cover ways in which advocates can better elicit helpful testimony on direct examination. A sample - or "mock" - direct examination will be conducted.

#### **Panelists:**

Lynda (L.J.) Fisher, Esq., Senior Attorney, Empire Justice Center

Jocelyne Martinez, Esq., Supervising Attorney, The Legal Aid Society

Emilia Sicilia, Esq., Director of Disability Benefits Advocacy, Urban Justice Center

#### AA. Filling in the Gap: Using Non-Lawyers to **Educate & Assist Pro Se Litigants**

MCLE Credits: NONE

Room: Schenectady/Troy

Legal Information for Families Today (LIFT) in collaboration with University Settlement will present on using non-lawyers to assist in providing access and legal education to litigants without representation. The presentation will include best practices, protocols and effective models in using nonlawyers to assist pro se litigants navigate various courts and legal processes throughout New York State. Specifically, LIFT will discuss the current continuum of services model used to deliver award-winning services to unrepresented litigants throughout New York City Family Courts. University Settlement will present on the model and methods used in Project Home and the Navigator Project in Housing Court; both programs use non-lawyers to assist litigants with their housing court matters.

#### **Panelists:**

Katherine Chang, Program Coordinator, Project Home, University Settlement

Jameelah J. Hayes, Esq., Director of Programs, Legal Information for Families Today

Jennifer Vallone, Project Director, Project Home, University Settlement

## Friday, September 12

Afternoon Sessions

#### 1:30pm - 3:00pm

#### D. Defending and Assisting Consumers in Debt **Collection Lawsuits**

1.5 MCLE Credits: 1.5 Skills

Room: Salon D

Over the last decade, New York courts have seen an epidemic of consumer debt lawsuits brought against low-and middle-income people. Often filed in bulk and with scant evidence, debt collection firms count on unrepresented litigants either not responding or not being able to defend themselves. The results are frozen bank accounts, earnings lost to garnishment, and often improper seizures of government benefits or imprudent settlements that put consumers in even more perilous positions. Because the creditors and "debt buyers" bringing these suits often possess scant, no, or inauthentic evidence, many consumers have defenses, and many judgments are entered without proper notice, attorney assistance can make a profound impact, enabling consumers to eliminate judgments or defeat lawsuits, thus improving their credit and finances.

This panel will provide an introduction to the most common litigation tasks with which consumer defendants may request assistance from legal services practitioners: vacating default judgments and answering a consumer credit transaction summons. We will also discuss innovative programs and strategies for helping pro se consumer litigants with these tasks through unbundled legal services models such as CLARO and Volunteer-Attorney-for-the-Day programs, combined with document assembly tools and online resources available through LawHelp/NY.

#### **Panelists:**

Carolyn E. Coffey, Esq., Supervising Attorney, MFY Legal Services, Inc.

Evan Denerstein, Esq., Staff Attorney, MFY Legal Services, Inc.

Adam Friedl, Esq., Program and Special Initiatives Manager,

Matthew Parham, Esq., Staff Attorney, Western New York Law Center

#### K. Breaking Down the Barriers to Language Access

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon B

Legal service providers frequently encounter immigrant clients who, due to language and cultural barriers, have not been provided with meaningful access to programs and services such as health care, housing, social services, police protection, education and the courts. This workshop will provide an overview of the requirements of Title VI of the Civil Rights Act and Executive Order 13166, the recently enacted NY State Language Access Order No. 26, the Fair Housing Act, the Affordable Care Act, as well as local county executive orders. We will discuss the specific settings where national origin discrimination and language barriers are encountered, cite the relevant regulations and emphasize the profound impact language access has had on our communities. Presenters will provide an array of strategies to address language access barriers including litigation, administrative advocacy, coalition building, community organizing and legislative initiatives, citing successful advocacy efforts and best practices. Attendees will be encouraged to examine creative methods for addressing language access challenges and to develop new partnerships and alliances which will strengthen their effectiveness and connectedness beyond the legal services community.

#### **Panelists:**

Linda R. Hassberg, Esq., Senior Staff Attorney, Empire **Justice Center** 

Cheryl Keshner, Senior Paralegal/Community Advocate, Empire Justice Center

Robin Marable, Esq., Staff Attorney, Legal Assistance of Western New York

Amy S. Taylor, Esq., Senior Staff Attorney and Coordinator, Equal Rights Initiative, Legal Services NYC

#### V. It Will Happen to Us All: An Essential Guide to **Delivering Disaster Legal Aid**

1.5 MCLE Credits: 0.5 Ethics; 1.0 Skills

Room: Schenectady/Troy

A new legal specialty has emerged, and one that is arguably around for good. A growing number of New York State legal services programs have disaster aid units or have had a "disaster docket" develop in recent years. Irene, Ike, Sandy—whether natural disasters or other large events, disaster preparedness is important for both program infrastructure and attorney professional development. This panel will focus on the lessons learned by attorneys who provided frontline legal services post-Superstorm Sandy, and whose work now encompasses a range of issues that low-income communities continue to confront in the post-disaster context. Did New York do better than New Orleans? Were New York advocates "disaster prepared"? What can you do to better prepare yourself and your legal services program in the event a disaster strikes in your community?

#### **Panelists:**

Christine N. Appah, Esq., Staff Attorney, Disaster Relief Unit, The Legal Aid Society

Sunny Noh, Esq., Supervising Attorney, Storm Response Unit, New York Legal Assistance Group

Fazeela Siddiqui, Esq., Staff Attorney, The Legal Aid Society

Anne Stephenson, Esq., Staff Attorney, Homeowner & Consumer Rights, Queens Legal Services/Legal Services NYC

Moderator: Jennifer Ching, Esq., Project Director, Queens Legal Services / Legal Services NYC

#### AB. Implementing Federal Rights: The American **Private Enforcement Model**

1.5 MCLE Credits: 1.5 Professional Practice

Room: Salon A

In his book, The Litigation State (2010), Professor Sean Farhang maintains that in the United States, a "profoundly important instrument" of "policy implementation" is the private enforcement of civil rights, labor protective and consumer laws, primarily achieved through fee-shifting statutes such as Section 1988. Farhang contends that the American regulatory state is largely comprised of "radically decentralized intervention" by private parties bringing statutory and regulatory enforcement actions in federal court; cases that "span the waterfront of federal policy". This workshop will explore: (1) the theory and practice of private rights enforcement as a policy tool; (2) Examine several different federal statutory enforcement mechanisms: (FLSA, Title VII, IDEA, ADA, FDCPA, §1988); (3) Discuss the role and importance of legal services programs in context of policy enforcement; (4) Highlight problems and issues arising in private policy enforcement litigation, e.g. Buckhannon, arbitration, Arbor Hill, Jeff D and waiver of fees, and others.

#### Panelists:

Peter Dellinger, Esq., Senior Attorney, Empire Justice Center Jonathan Feldman, Esq., Senior Attorney, Empire Justice Center

#### T. Effective Legislative Advocacy for Lawyers and Advocates

MCLE Credits: NONE

Room: Salon C

As legal services providers, our responsibilities to clients go far beyond the courts. Legislation, budget advocacy, and administrative reform—pursued in partnership with the communities we serve—are crucial tools for securing policy victories and sustaining our own programs. This workshop will include an overview of the New York State legislature and legislative process; tips for selecting campaign issues, building coalitions, and developing strategy; and an introduction to legal issues including lobbying rules for non-profit organizations and considerations for bill drafting and negotiation. The workshop will include lecture, discussion, and case studies.

#### **Panelists:**

Harvey Epstein, Esq., Associate Director, Urban Justice

Kate Rubin, Managing Director, Civil Action Practice, The **Bronx Defenders** 

John Wright, Principal, The Wright Group NY

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## **Biographies**

#### Glenn Lau-Kee, Esq. - NYSBA President



Glenn Lau-Kee is President of the 75,000-member New York State Bar Association.

Lau-Kee is a partner of Kee & Lau-Kee. He concentrates his practice in real estate and business law.

A 15-year member of the State Bar Association, Lau-Kee was a memberat-large of the Executive Committee and co-chair of the Membership

Lau-Kee

Committee and the President's Committee on Access to Justice. He is a member of the Business Law, Health Law and Real Property Law sections. He received the Commercial and Federal Litigation Section's George Bundy Smith Pioneer Award in 2010.

Lau-Kee was a member of the Task Force on the State of Our Courthouses and the Special Committees on Legal Specialization, Multijurisdictional Practice and Sarbanes-Oxley Issues.

He is a vice-chair of the board of the Greater New York City YMCA and a board member of the Fund for Modern Courts, The New York Bar Foundation and US-Asia Institute. He served as president of the Asian American Bar Association of New York from 1997 to 1999 and was appointed by former Chief Judge Judith S. Kaye to serve on the Commission to Examine Solo and Small Firm Practice, and the Committee to Promote Public Trust and Confidence in the Legal System.

A resident of Westport, Connecticut, Lau-Kee graduated from Yale College and Boston University School of Law.

#### David P. Miranda, Esq. - NYSBA President-Elect



Miranda

David P. Miranda is a partner at Heslin Rothenberg Farley and Mesiti in Albany. He is a trial attorney whose intellectual property law practice includes trademark, copyright, trade secret, false advertising, patent infringement and Internet-related issues.

A 24-year member of the State Bar Association, Miranda served as secretary of the Association for four years.

He currently co-chairs the President's Committee on Access to Justice. He previously chaired the Electronic Communications Committee and the Young Lawyers Section. He co-chaired the Special Committee on Strategic Planning.

He is a member of the Commercial and Federal Litigation Section, Committee on Annual Award, Committee on Continuing Legal Education and Membership Committee. He is a past member of the Task Force on E-Filing and the Special Committee on Cyberspace Law.

Miranda is a past president of the Albany County Bar Association. He has served on the Independent Judicial Election Qualification Commission for the Third Judicial District.

A resident of Voorheesville, Miranda graduated from the State University of New York at Buffalo and Albany Law School.

#### Hon. Jonathan Lippman



Lippman

Jonathan Lippman, Chief Judge of the State of New York and Chief Judge of the Court of Appeals, was appointed by Governor Paterson in January 2009 and confirmed by the New York State Senate in February 2009.

In May 2007, Governor Spitzer appointed him to serve as the Presiding Justice of the Appellate Division of the Supreme Court, First

Department. In that capacity, he served on the Administrative Board of the Courts, the policy and rulemaking body of the New York State Court System. From January 1996 to May 2007, he served, by appointment of Chief Judge Kaye, as the Chief Administrative Judge of all New York State Courts and is the longest-tenured person to have served in that capacity. In 2005, he was elected as a Justice of the Supreme Court for the Ninth Judicial District. Chief Judge Lippman also served as an Associate Justice of the Appellate Term, Ninth and Tenth Judicial Districts, from January 2006 to May 2007.

Chief Judge Lippman's career in the court system spans four decades, starting as an entry-level court attorney and including service as a law clerk in Supreme Court and Surrogate's Court, and as Principal Court Attorney for Supreme Court, New York County, Civil Term. He was named Chief Clerk and Executive Officer of that court in 1983. Chief Judge Lippman was appointed Deputy Chief Administrator for Management of the statewide court system in 1989. In 1995, he was appointed by Governor Pataki as a Judge of the New York Court of Claims and was subsequently reappointed to a full nine-year term on that court in 1998.

Chief Judge Lippman previously served on the Board of the National Center for State Courts and is a former President of the Conference of State Court Administrators, which consists of court leaders representing all 50 states and United States territories. In 2008, he received the William H. Rehnquist Award for Judicial Excellence, an award given annually by the National Center for State Courts to one state court judge chosen from throughout the country.

Chief Judge Lippman received his B.A. in 1965 from New York University, from which he graduated Phi Beta Kappa and cum laude. He received his J.D. from New York University School of Law in 1968.

#### Edwina Frances Martin, Esq.- Chair, 2014 Partnership Conference



**Martin** 

Edwina Frances Martin, Esq., is a public interest lawyer specializing in Government Relations, Non-Profit Management, and Strategic Communications. In 2012 she was appointed the Legislative and Budget Director and Counsel for New York City Councilwoman Debi Rose (49th District, North Shore, SI), responsible for, among other things, coordinating the Councilwoman's budget priorities and implementing the

Councilwoman's public policy and legislative platform. For 11 years prior to this appointment she was the Director of Communications and Government Relations for Legal Services NYC, responsible for the development and management of communications tools and programs that promoted Legal Services NYC's image and educational messages to target audiences and various media entities. Prior to Legal Services NYC, Ms. Martin was in private practice, including four-and-one-half years as a Litigation Associate with Shearman & Sterling and two years with the Harlem firm of Van Lierop, Burns & Bassett, LLP; she was also a law clerk to the Hon. Lawrence W. Pierce in the United States Court of Appeals for the Second Circuit.

Ms. Martin is a recipient of several awards including the Staten Island African-American Political Association 2005 Community Service Award (for coordinating the opening of Staten Island Legal Services), a 2008 Emerging Leader Award from the New York State Chapter of the American Association of University Women, the 2010 Women's History Month Woman of Distinction Award from New York State Senator Diane Savino and New York State Assembly Member Nicole Malliotakis, and a 2012 Ruby Award from the Staten Island Chapter of Soroptimist International.

Ms. Martin is active in several civic and legal organizations including the American Association of University Women (President, AAUW-NYS, 2014-2016 Term), the Staten Island Alumnae Chapter of Delta Sigma Theta Sorority, Inc. (Social Action Co-Chair), and Soroptimist International/SI. Her bar association work includes the New York State Bar Association, where she serves as an At-Large Member of the Executive Committee, Chair of the 2014 Partnership

Conference, and a member of the New York Bar Foundation Board of Directors. She is also a Fellow of the American Bar Association and a member of the Staten Island Women's Bar Association (Immediate Past President), the Network of Bar Leaders (Board Member), the Richmond County Bar Association, the Staten Island Trial Lawyers Association, and the New York City Bar Association.

Ms. Martin is a 1992 graduate of NYU School of Law where she was selected as graduation class speaker, received the Vanderbilt Medal for school service, and was an Arthur Garfield Hays Fellow. She holds a B.A. in Art History from Williams College.

#### Andrew Scherer, Esq.



Scherer

Andrew Scherer is the Policy Director of the Impact Center for Public Interest Law at New York Law School, which is launching in the fall of 2014, and a Distinguished Adjunct Professor at NYLS. In addition, he is the Principal of Andrew Scherer Consulting and serves as a consultant and expert witness with respect to housing, landlord-tenant, property, land use, access to justice, delivery of legal services and economic rights

matters, in the United States and internationally. He is a Senior Fellow at the Furman Center for Real Estate and Urban Policy at NYU Law School and an Adjunct Professor at the Columbia University Graduate School of Architecture, Planning and Preservation. He is the author of the treatise, Residential Landlord-Tenant Law in New York (Thomson Reuters), originally published in 1994 and updated annually, and he is the author of numerous other publications. In 2010, Mr. Scherer stepped down after nine years as Executive Director of Legal Services NYC, the largest nonprofit exclusively devoted to civil legal services in the United States, where he had worked in a variety of capacities since 1978. Mr. Scherer has also taught at CUNY Law School, NYU Law School, Yangon University in Myanmar, and Bennington College. He has lectured widely in the U.S. and in Latin America, Africa and Asia. He received his B.A. from the University of Pennsylvania and his J.D. from NYU Law School.

#### Lillian Moy, Esq.



Moy

Lillian M. Moy became the Executive Director of the Legal Aid Society of Northeastern New York, Inc. in 1995. She is a 1981 graduate of Boston University School of Law. She is a former member of the Board of the National Legal Aid & Defender Association (NLADA) and past Chair of NLADA's Civil Policy Group. Ms. Moy is a former member of the ABA's Standing Committee on Legal Aid

and Indigent Defense (SCLAID) and participated on the SCLAID Task Force which revised the ABA Standards for Providers of Civil Legal Aid to the Poor. She is a current member of the ABA's Standing Committee on Pro Bono and Public Service.

#### Harvey Epstein, Esq.



**Epstein** 

Harvey Epstein is the Associate Director of the Urban Justice Center. In addition, he is the Project Director of the Community Development Project at the Urban Justice Center, which supports dozens of community-based organizations to win legal cases, publish community-driven research reports, assist with the formation of new organizations and cooperatives, and provide technical and transactional assistance in sup-

port of their work towards social justice. These cases are litigated in both state and federal court and are usually on behalf of groups of individuals organized by the community-based organization. Prior to working at UJC, Harvey was the Associate Director/Managing Attorney for Housing Conservation Coordinators (HCC), a community-based Not-For-Profit organization which works to preserve decent affordable housing. Prior to working for HCC, Harvey was a staff attorney at the Community Law Offices for The Legal Aid Society. As a staff attorney, Harvey worked in the Housing Development Unit-which represented tenant associations in affirmative litigation, including rent strikes, and group actions seeking repairs. In addition, Harvey worked with numerous tenant associations in obtaining ownership of their buildings. Harvey was also instrumental in creating a Community Economic Development Project at The Legal Aid Society, which assists small businesses and Not-For-Profits with transactional legal matters, including incorporation, applications for tax exemption, negotiating commercial leases and loan agreements. Harvey is a graduate of Ithaca College and CUNY School of Law.

#### Steven Banks, Esq.



**Banks** 

Steven Banks, appointed Commissioner of the Human Resource Administration by Mayor Bill de Blasio, was formerly Attornevin-Chief of the New York City Legal Aid Society, which has a staff of 1,600, including 1,000 lawyers who provide legal assistance in all five boroughs and in 300,000 legal matters annually through its criminal, juvenile rights and civil practices divisions.

Motivated by a commitment to represent indigent New Yorkers, Mr. Banks began his career at the Society in 1981 as a staff attorney. Throughout his career, he has earned the reputation of someone who understands the importance of diversity in the public interest law model. While working with the Legal Aid management team, the Association of Legal Aid Attorneys, the Attorneys of Color of Legal Aid and 1199 SEIU, he has led efforts to implement several diversity initiatives. These include revamped recruitment initiatives, innovative investigator and law student internship programs, "Awareness Month" events and a new mentoring program.

As Legal Aid's Attorney-in-Chief he led the organization through a complete financial and managerial restructuring to save it from bankruptcy. Prior to becoming the Attorneyin-Chief, Mr. Banks held the positions of Associate Attorneyin-Chief, Deputy Attorney-in-Charge of the Civil Practice, Coordinating Attorney of the Homeless Rights Project, and Director of Government Relations for the Civil Practice.

Mr. Banks received his B.A. magna cum laude from Brown University in 1978 and his J.D. from New York University School of Law in 1981.

Thursday, September 11 | 9:00 pm - 11:00 pm

## DANCING WITH THE BAR



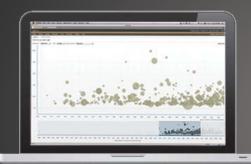
## DRINKS AND DANCING HOSTED BY



# DO YOU HAVE A STORY TO SHARE...

- Have you worked on or do you know of a special Pro Bono project?
- Has a pro bono case made a difference in the lives of others?
- Has an individual attorney or firm gone above and beyond to provide pro bono assistance?

We invite you to submit articles showcasing excellence in pro bono service for upcoming editions of the Pro Bono Newsletter. Guidelines for article submission and important dates are available at www.nysba.org/pbdates







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## NEW YORK STATE BAR ASSOCIATION

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## **2014 Empire State Counsel® Verification Form**

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or (2) a not-for-proprimarily to addres	of fee to one or more of the following: (1) persons of limited financial means; ofit, governmental or public services organization whose services are designed as the legal and other basic needs of persons of limited financial means; or (3) and primary purpose is to increase the availability of legal services to persons of eans.					
	(Signature) Date					
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please submit a hig (statement should during NYSBA's A Avenue of the Am	would like to be included in the <i>2014 Empire State Counsel® Photo Gallery</i> , the resolution photograph and a <u>brief statement describing your pro bono service</u> be 4-7 sentences in length). The <i>Photo Gallery</i> will be prominently displayed Annual Meeting, January 26-January 30, 2015 at the New York Hilton, 1335 ericas, New York City. To be included in the <i>Photo Gallery</i> , your photograph be received no later than <b>December 31, 2014</b> .					
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#### NEW YORK STATE BAR ASSOCIATION



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Attorneys admitted 2007 and prior	\$275.00					
Attorneys admitted 2008-2009	185.00			w members, or those who ha	ve not	
Attorneys admitted 2010-2011	125.00	been members in the pa	st year.			
Attorneys admitted 2012-2014	60.00	DUES PAYMENT: Mem	nbership [	Dues Subtotal \$		
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Attorneys admitted 2008-2009 150.						
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