

# LEGAL COUNSEL FOR THE ELDERLY

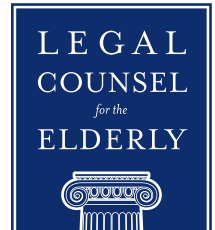
## 40TH ANNIVERSARY ANNUAL REPORT



CHAMPIONING THE DIGNITY AND RIGHTS  
OF SENIORS IN WASHINGTON, D.C.

— 2015 —

40<sup>TH</sup> ANNIVERSARY



1975-2015

# MESSAGE FROM

THE EXECUTIVE DIRECTOR  
AND THE BOARD CHAIR



JAN ALLEN MAY, ESQ.  
EXECUTIVE DIRECTOR



SARA KROPF, ESQ.  
BOARD CHAIR

In 2015, Legal Counsel for the Elderly celebrated its 40th anniversary. The mission that inspired us in 1975 continues to motivate us today—we believe that every person has a basic right to justice. Every day we work with that goal in mind. Those efforts and our successes over the four decades can be described in three words: Innovations, Volunteers and Suppleness in responding to emerging needs.

## **Innovations**

LCE has developed a large number of innovative projects, many of which are now in use nationwide. Utilization of trained lay volunteers in legal services (1975), organized pro bono where the legal service program develops the case, places the case, and monitors to completion (1977), the use of legal advice hotlines to deal quickly and efficiently with routine client matters (1985) are just three such examples. More recently, LCE has utilized holistic services combining law and social work assistance on housing issues, tapped larger law firms on a vast number of pro bono systemic projects and expanded the long-term care ombudsman purview to include community-based care.

## Volunteers

LCE opened its doors in the fall of 1975 with a small staff and a cadre of volunteers. Volunteers have always been an integral part of LCE's delivery models. All volunteers assist staff with cases in one way or another: pro bono attorneys handle in excess of 700 cases per year, and other volunteers educate the client community on Medicare waste, fraud and abuse and LCE services generally. Indeed, virtually every unit of LCE includes a volunteer component as an integral part of its operations. LCE provides a variety of opportunities for volunteers to engage in fulfilling work helping those who are less fortunate to obtain and maintain their income, housing, health care and independence making a substantial difference in the quality of our clients' lives.

## Suppleness

Suppleness has been a key to LCE's success. By suppleness, we mean the ability of LCE to quickly identify client problems as they emerge, and then realign priorities, staffing and resources to meet these emerging needs. Attacking predatory mortgage lending practices in 1992, developing a grandparent subsidy for those taking care of their grandchildren in 2005, and playing a key role in the overhaul of the D.C. real property tax system in 2014 are three examples of reallocating resources to address fundamental problems in our client community.

At the moment when something goes wrong for a senior making things seem hopeless, LCE is there to empower them and advocate on their behalf. As we progress into our fifth decade, LCE will continue our mission to Champion the Dignity and Rights of Seniors in Washington, D.C.

**Everyone deserves  
the dignity to feel  
like the phrase  
“justice for all”  
actually has  
meaning.**

*— LCE Staff Attorney Nathaniel Aquino*

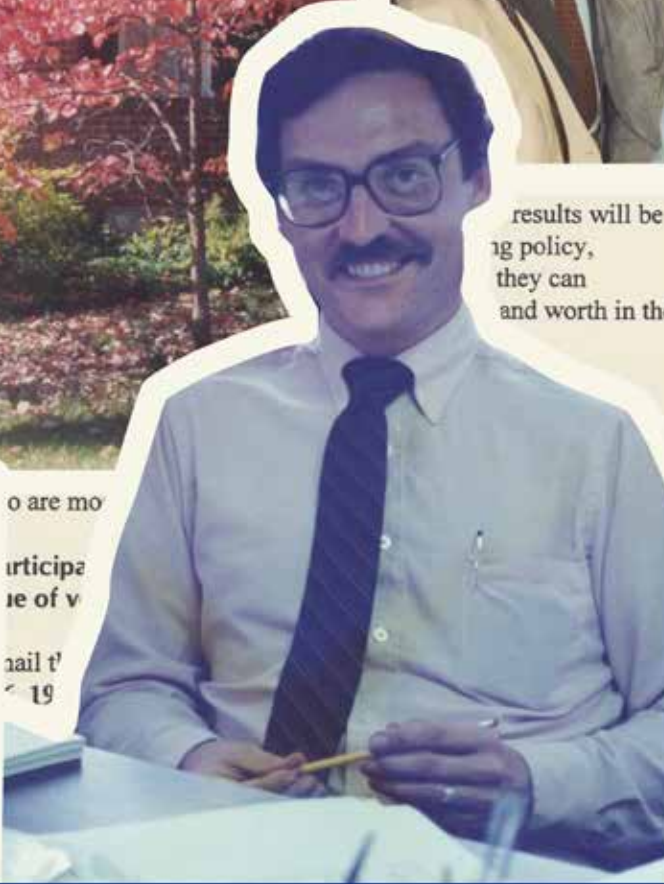


# Active Intake for Legal Services

A How-To Manual

Dear LTC Ombudsman Volunteer:

We thank you for the outstanding services you provide facilities. Your efforts are sincerely appreciated and in improving the quality of life for thousands of older



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# MISSION

Legal Counsel for the Elderly helps low-income, older D.C. residents by: stopping home foreclosures and eviction, preserving and promoting affordable housing, representing seniors victimized by scams and predators, working directly with the courts to oversee and administer guardianships, and—by leveraging thousands of hours of pro bono help from area law firms—producing hundreds of wills, powers of attorney, advanced health directives and other “end-of-life” legal documents.

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Nothing tells a story like a video. Please visit us on YouTube 



# WHAT WE DO



## Meet Mr. C

60-year-old Mr. C. had no job, no money, no home. What he did have were debilitating health problems and drug and alcohol

addictions. Back pain and a degenerative joint disease prevent Mr. C from working. “I hit rock bottom,” said the Navy veteran. Today, he is on a path lined with hope. Legal Counsel for the Elderly secured a \$1,400 monthly pension he was entitled to through the U.S. Department of Veterans Affairs, plus more than \$12,000 in retroactive benefits. The LCE team was “compassionate enough to stick with me,” he says. “They were like quiet angels.”

## Meet Ms. T

64-year-old Ms. T was facing eviction. She was also in hospice and has two sons, both disabled, one confined to a bed. Ms. T paid her rent devotedly, but the local housing authority’s voucher program withheld more than \$6,300 in back rent due to housing code violations in the unit. In addition, her family was not receiving the proper level of home health care assistance. Through a combined effort of LCE’s Alternatives Project, the Ombudsman Program and law firm Covington & Burling, Ms. T and her sons were spared eviction and are receiving better home health care services. They now live in a wheelchair accessible unit complete with an elevator, which better suits their medical conditions. The team visited the family recently and learned that our elderly client is no longer in hospice due to improvements in her medical condition contributed in part, to her new living conditions.

**It is a blessing to  
apply my skills  
to help seniors  
remain in their  
communities with  
independence  
and dignity.**

*— LCE Supervising Attorney Jennifer Berger*



### **Meet Mr. J**

“They prevented my eviction,” said Mr. J, an elder whose rent and monthly income are only \$200 apart. LCE’s Alternatives to Landlord Tenant Court Project enlisted an army of help for Mr. J, consisting of LCE attorneys, social workers, and general staff, plus AARP Community Builders, who donated their time to help in LCE’s efforts.

LCE is helping Mr. J with medical advocacy and is supporting his efforts to obtain necessary repairs to his apartment. He is also receiving tax assistance from AARP Foundation Tax-Aide. Mr. J continues to work part-time in order to try to make ends meet, and we are committed to working with this resilient elder and his faith community, to find more affordable and supportive housing. Mr. J, who is a fountain of local and national history, dreams of working at the new National Museum of African American History and Culture, scheduled to open September 2016.



**The strongest lesson  
I’ve learned from  
my clients is one  
of courageous  
persistence.  
I hope as I age,  
that I can find  
the same strength  
and courage as our  
amazing clients.**

*— LCE Legal Associate Kathy Ferger*

## 40 YEARS OF SERVICE TO D.C.'S MOST VULNERABLE SENIORS

# Seniors shouldn't have to fight alone.

— LCE Staff Attorney Kerry Diggin



### 1970s

- > **1975**—AARP receives a grant from the federal Administration on Aging (AoA) to become Law and Aging Resource Center. Grant establishes LCE as a pilot project to determine if non-attorney volunteers supervised by attorneys can cost-effectively provide legal services to low-income, 60-plus in D.C.
- > **1976**—AoA grant is expanded to provide nationwide training on elder law for advocates who provide free services to seniors. Today, the grant includes training for the trainers who, in turn, are required to train others.
- > **1977**—LCE is one of six programs to receive a grant to develop a new way of using attorneys in private practice to provide *pro bono* services to low-income people. This new model greatly expanded *pro bono* services and over

1,000 projects exist today in every state.

### 1980s & 1990s

- > **1985**—LCE establishes first legal hotline in the country. Model proves to be very successful. Nearly 150 legal aid projects adopt the model, which typically doubles services.
- > **Early 1990s**—LCE launches AARP Legal Services Network, which operates in most states today; participating attorneys in private practice provide free legal consultations to any AARP member.
- > **Late 1990s**—LCE originates a variety of ways for improving and expanding services, such as eviction prevention; foreclosure prevention; 'holistic' services, new ways of recruiting volunteer



attorneys, 'active intake,' and brief services unit. These ideas are disseminated at national conferences, articles, and manuals.

#### 2000s

- > **2005**—LCE receives a cy pres award of \$2.34 million dollars for a Consumer Fund, the interest to be spent on a Consumer Unit within LCE.
- > **2008**—LCE awards one of two ABA Fellowships given nationwide for a recent law school graduate to assist with LCE's work on taxes, especially tax sales of real estate, bankruptcy and related matters.
- > **2009**—LCE creates and implements a strategic plan to increase the number of Hispanic and Asian clients served by LCE. By end of year, the clientele doubles.
- > **2012**—LCE is successful in securing passage of legislation in D.C. expanding

Long-Term Care Ombudsman Program's jurisdiction to encompass home health care and an appropriation to increase the staffing of LTCOP to carry out these functions.

- > **2013**—In a national competition, LCE is awarded a 3-year "Model Projects" grant from the U.S. Administration on Aging allowing LCE to develop a model project specifically around identifying, developing, packaging and marketing large systemic reform projects to the private bar on a *pro bono* basis.
- > **2013**—A week-long front page *Washington Post* investigative report on broken real property tax lien system in D.C., assisted in large part by LCE, results in the D.C. Council changing the law within nine days of the first article being published, preventing many older D.C. homeowners from losing their homes.

**I was raised to be  
wholeheartedly  
involved with my  
intergenerational  
community of  
extended family.  
Being a geriatric  
social worker with  
LCE gives me the  
opportunity to  
follow that path.**

—LCE Social Worker Karen Currie

## 2015

- > Fully implemented a judicial foreclosure process in D.C. saving hundreds of homes for older D.C. residents.
- > Engaged 25 large private law firms in 70 new systemic initiatives, a 75% increase over 2014.
- > Long-Term Care Ombudsman Program resolved about 20% more complaints in 2015 compared to 2014.
- > In partnership with two other legal service programs, implemented an innovative right-to-counsel project in D.C. for public housing tenants—the first of its kind in the nation.
- > LCE handled 3.5% more cases in 2015 than in 2014. The Pro Bono Project referred 894 cases, a 24% increase over 2014 and closed 1,204 cases, a 47% increase over 2014.



**An Ombudsman  
champions the cause  
of those who are not  
able to effectively  
advocate for  
themselves. For me  
this is a discipline  
of putting others  
needs before  
my own.**

*— Ombudsman Manager Purley Jones*

- > More than \$16 million in benefits were obtained for individual clients, in addition, two HUD mortgages were renegotiated for two senior buildings saving tenants \$500,000 in rent each year for the next 20 years. A total of 100 older residents will now continue to receive subsidized rent. Total value over 20 years: \$10 million.
- > Completed a comprehensive study of LCE programs with recommendations concerning replication of AARP/LCE model projects elsewhere in the country.
- > Model project begun whereby D.C. residents can get minor (up to \$10,000) home modifications done enabling people to remain in their own homes (\$1 million set aside for this purpose).
- > Ombudsman program successfully advocated for an increase from 30 days to 120 days, for the ability of a Medicaid

waiver recipient to keep their Elderly and Persons with Disability Status living in the community and prevent institutionalization in the event of hospitalization.

- > More than 800 LCE volunteers, interns and fellows donated more than 20,000 hours of assistance with numerous LCE projects and programs.

**Helping our  
seniors live with a  
sense of dignity and  
security is the  
most rewarding  
experience.**

— *LCE Staff Attorney Daniela de la Piedra*



**I work here because  
I think individually  
and collectively  
every day we can  
make a very positive  
difference in the  
quality of life for  
older people in  
the District of  
Columbia and  
beyond.**

— LCE Executive Director Jan May

## FINANCIAL STATEMENT

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For year ending December 31, 2015

### REVENUES

Contributions, Grants & Support	\$5,906,279
In-Kind Contributions	3,361,567
Investment Loss	(224,411)
Miscellaneous	3,988

**TOTAL REVENUES** **\$9,047,423**

### EXPENSES

Program Services	\$7,136,005
Management & General	1,581,698
Resource Development	158,234

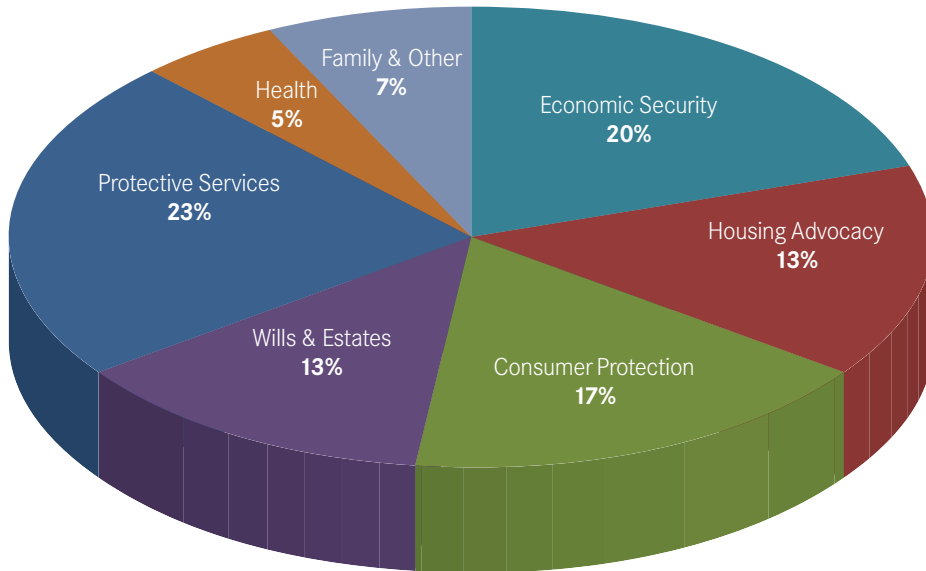
**TOTAL EXPENSES** **\$8,875,937**

**CHANGE IN NET ASSETS** **\$171,486**

**NET ASSETS AT THE BEGINNING OF THE YEAR** **\$12,747,882**

**NET ASSETS AT THE END OF THE YEAR** **\$12,919,368**

*Net Assets include “The Philip Friedman Consumer Protection Fund” (\$3,678,940) and “The John R. Pickering Law Student Scholarship Fund” (\$339,481).*



**Our clients  
remain grateful  
for what they  
have, which has  
made me even  
more grateful  
for life, love, and  
my family.**

*— Pro Bono Manager Sheryl Miller*



**I enjoy working  
on LCE's Hotline.  
Often times our  
clients are weighted  
down with so many  
worries, they just  
want to talk to  
someone who  
will listen.**

— Hotline Attorney Ivy Smithers

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**I am passionate  
about being a  
safety net to  
protect  
underserved  
populations  
from falling  
through the  
cracks.**

— *LCE Staff Attorney Daniel Palchick*

## THE YOUNG LAWYERS ALLIANCE

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Launched in 2014, LCE's Young Lawyers Alliance (YLA) promotes our mission and strengthens our impact. YLA members serve as LCE's champions within their law firms and their professional networks, helping to raise the organization's profile and grow resources—both financial and pro bono—to support our services to vulnerable D.C. seniors. With our thanks, LCE recognizes the following volunteers who served as YLA members in 2015:

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We also express our sincere gratitude to the following individuals, families, law firms, foundations, companies, and government agencies for their investment in our work in 2014 and for their ongoing commitment to our older neighbors in need:

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*Legal Counsel for the Elderly is affiliated with AARP.*



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supported by the D.C. Office on Aging

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40<sup>TH</sup> ANNIVERSARY

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*for the*  
ELDERLY



1975 - 2015