



Maryland Attorney General's COVID-19 Access to Justice Task Force

MINUTES

Life & Health Planning Committee Meeting June 30, 2020 Meeting

Item	Subject	Time Allotted	Notes
1.	Call to Order, Introductions and Approval of Agenda	10 minutes - JB	<p>Committee Co-Chair Juliana Bell called the meeting to order, informed everyone that they were on the Life and Health Planning Committee call, and asked if there were any requested changes to the agenda. **No changes were requested.</p> <p>Juliana then went through each name and number appearing in the Google Meet's attendees list and asked that attendees briefly introduce themselves. Attendees were asked to sign in on the Task Force – Life and Health Planning Committee Master spreadsheet under the Meeting attendance and notes tab.</p> <p>Attendees present at the beginning of the meeting included:</p> <ul style="list-style-type: none">• Committee Co-Chair Juliana Bell, Assistant Attorney General• Committee Co-Chair Danielle Cruttenden, Outgoing chair, MSBA Estates & Trusts Section• Paul Ballard, Assistant Attorney General• Angus Derbyshire, Maryland Legal Aid pro bono coordinator• Brenda Gruss, Assistant Attorney General, Criminal Appeals Division• Bruce Villard, outgoing Chair, Wills for Heroes• C.P. Hoffman, Legal Director, FreeState Justice• Jaki Alston, Community Member• Allison Harris, Home Preservation Project Director, Pro Bono Resource Center of Maryland

			<ul style="list-style-type: none"> • Anne Coventry, Incoming Chair, MSBA Estates & Trusts Section • Jessica Quincosa, Executive director of community legal services • Marlene Clark, SEEDCO, work and family supports • Meredith Girard, Managing Attorney, Mid-Shore Pro Bono • Morris Klein, outgoing chair, MSBA Elder Law & Disability Rights Section • Rena Shah, Director, MSBA Access to Justice Commission, A2J Task Force Vice Chair • Roland Schrebler, member-at-large, Estate & Trust Law Section, Maryland State Bar Association • Victoria Heyleger, Co-Chair, Howard County Estates & Trusts Section, private practice attorney • Wanda Calvin Caliboor, Executive Director of Bar Association of Montgomery County • Ron Landsman, Elder law attorney • Shelby McCloskey, law clerk, University of Maryland Law • Sharon Goldsmith, Director of Pro Bono Resource Center of Maryland • Rexanah Wyse, chief of staff, U.S. Interagency Council on Homelessness • Josie Yuzuik, Assistant Attorney General <p>Quick background of the committee: This committee actually started functioning under the auspices of the Access to Justice Commission and the Estates and Trusts section of the Maryland State Bar Association. However, as of the last meeting, the Committee began working under the Attorney General's Access to Justice Task Force, which was launched on June 11th. The Committee is also trying to comply with the spirit of the Open Meetings Act</p>
2.	Review of 2020.06.23 Meeting Minutes	5 minutes - JB	<p>Juliana Bell asked for comments or suggested changes to last week's meeting minutes.</p> <p>**No comments or suggestions were made.</p>
3.	<p>Subcommittee Update and Discussion.</p> <p>Initial Focus on:</p> <ul style="list-style-type: none"> A. Community Outreach Subcommittee B. Resource Development Subcommittee <p>Later Focus on:</p> <ul style="list-style-type: none"> A. Volunteer Lawyer Recruitment 	15 minutes – JB, RS	<p>Juliana Bell discussed what the focus of the Committee has been thus far;</p> <ul style="list-style-type: none"> • Big planning issues such as Wills, Power of Attorney, and Advance Medical Directives. • Navigating probate court with a particular focus on the population that has been affected by covid-19 the most, such as First Responders, members of communities hit disproportionately such as in the African-American Community, people work in nursing homes, medical professionals, and essential workers. • Pairing individuals in the aforementioned groups who are willing and would qualify for low-bono assistance from a lawyer or pro-bono assistance. • Short-term goals that can be implemented immediately: A public information campaign that would make people aware of the existing resources. • Medium/long-term goals: Identify issues for the Legislature to address- still in development. <p>Juliana Bell explained that in last week's meeting, we decided on four subcommittees through which we would do our work and provided a brief description of each. The four subcommittees are Resource Development, Community Outreach, Volunteer Lawyer Recruitment, and L&HP Communications. She directed the committee members to the Master Excel spreadsheet, where they could sign up to be on one of the subcommittees.</p>

<p style="text-align: center;">B. Communicat ions</p> <p>Note non-L&HP Committees being formed under the Task Force to assist all committees with Pro Bono/Low Bono; Communications</p>	<p>In order to accomplish the short-term goal, the public information campaign, more efficiently, the co-chairs and Reena realized that the Committee needed to narrow its focus on the Resource Development and Community Outreach subcommittees at first, as there are other committees within the Task Force that can help implement the committee’s plans. These committees include Pro-bono & Low-Bono, Data & Legal Tech, and Public Awareness/ Community Engagement.</p> <p>Reena discussed the three committees and how they will be able to assist our committee in implementing our plans. She informed the members that these three committees are still in the process of forming, but will be there to assist in the implementation of the ideas of the substantive committees. These committees will be filled with experts within the committee’s field and have connections with different vulnerable communities. They will work on how the messages are relatable to the audiences, reach out to the communities, create the actual structure of the programs, and assist in the implementation of the substantive committees’ plans.</p> <p>Theme of today’s meeting: Who’s missing, what’s missing?</p> <p>Juliana Bell began with the Community Outreach Subcommittee and looked at how many people have signed up for this subcommittee thus far. Juliana provided a brief description of the subcommittee, which is also included in the Master Excel spreadsheet. Although we identified that up to 15 committee members could sign up for the subcommittee, we wanted to ensure that we are expanding our reach both inside the committee and outside of it.</p> <p>Juliana Bell opened the floor to committee members to identify who we should be reaching out to in terms of who is missing from our committee that can help us plan what resources we are providing and reach our target audience.</p> <p>People and organizations the Committee members believe are missing;</p> <ul style="list-style-type: none"> • By the time someone has Covid and in the hospital, it might be too late to educate individuals with what resources are currently available. <ul style="list-style-type: none"> ○ A member disagreed as he believed the person hospitalized might still be able to present their wishes. • The committee is missing representatives from the Department of Aging. Vulnerable adults or seniors who are isolated or cut off from support systems could be a potential audience in different geographical areas. Asked for thoughts on how to reach out to the Department of Aging. • Medicaid recovery is not limited to nursing home care; in Maryland recovery is for ALL services on or after age 55.
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4.	Introduction and Discussion of Draft Resource Guide:	10 minutes -Sharon Goldsmith	<p>Sharon Goldsmith, the Executive Director of the Pro Bono Resource Center of Maryland, explained how she and members of her staff had done research on what legal services are currently available. The staff sent out surveys to all the local and specialty Bars and obtained a list of the services that are currently being offered. They put together a draft Resource Guide that was circulated to the committee members. Due to Covid and the environment we currently live in, Sharon wanted to make sure that the Guide included up-to-date resources, including all of the remote services currently offered.</p> <p>Sharon Goldsmith stated that the Guide is not in its final stage and that the title of the document would need to be changed to reflect the Committee's letterhead.</p>

			<p>Sharon Goldsmith explained that as they went through the different organizations, they tried to allow for different populations to sort of self-identify to see which services would be most relevant to them. The Guide begins with the free legal services that they identified throughout the various jurisdictions. The next category provides information for First Responders. The Wills for Heroes program was started by the Maryland State Bar Association a number of years ago, which offers First Responders estate planning services, not necessarily based on income. This category was included in hopes to connect people working on the frontlines who need these services immediately. The next category includes a low-rate service organization. The Civil Justice, Inc. provides more moderate income people with connections to lawyers at a lower cost. The last category of the Guide includes services that are offered for a fee.</p> <p>Sharon Goldsmith stated that she is still doing follow-ups with the different organizations to determine exactly what remote services are available. Asked for comments or suggestions</p> <p>Juliana Bell asked if a representative from Wills for Heroes to explain whether Heroes include essential workers. The outgoing co-chair for Wills for Heroes, Bruce Villard, explained Wills for Heroes does not currently offer any kind of remote services, as they are limited to the number of people they can serve. The organization received a limited donation of equipment, including laptops and software a few years that would assist in remote services, but the general administrative time of signing up people and making sure that they meet the requirements (First Responders, Maryland residents, simple wills, etc.) is not yet feasible with the amount of volunteers they currently have. Although the idea of expanding the definition of Heroes is something to consider, the organization is not currently set up to do complex estate planning and is pretty maxed out for just categorizing fire firefighters, EMTs, police officers, and so forth as Heroes. A discussion to expand the definition of Heroes for the co-chairs in the future would need to include expanding the number of people available to help out with administrative work, getting additional software, and increasing capacity.</p>
5.	Gap Analysis Discussion A. Identify what resources are missing and need to be	15 minutes - JB	<p>Juliana Bell asked the Committee members what needs to be added to the Resource Guide, what Financial Resources might be needed, how those resources could be targeted, and how to drive additional attorneys to volunteer organizations that provide these services.</p> <p>Discussion points by Committee Members;</p> <ul style="list-style-type: none"> • Several legal services have adapted to the circumstances arising out of Covid. For example, organizations have begun doing Community clinics and going into hospitals, where they would provide services on site with laptops, notaries, and several volunteers. Since remote services are

	added/created		<p>currently being offered, making connections with hospitals is vital in order to ensure people can be connected immediately when they need it most.</p> <ul style="list-style-type: none"> • Prior to this meeting, different organizations were asked to create one-pagers that explain to the community their rights or other legal information that their organization may have produced in relation to these issues. Should we further inform the public on how they can maybe do some of these things on their own? For instance, we could further explain what the terms mean and create a step-by-step information guide for navigating certain processes. Or, should our gap analysis be on what legal information we do not currently have on certain topics? For instance, are there new things that arose out of Covid that we need? <ul style="list-style-type: none"> ○ The Resource Development Subcommittee will need to further examine these concerns during their meetings. Juliana Bell encouraged more people to sign up for this subcommittee, as there were only 4 people signed up thus far. <p>Action List;</p> <ul style="list-style-type: none"> • Further discuss the gaps between what is missing and who is missing. We need to come up with ideas to address these gaps while simultaneously ensuring that we are tailoring these ideas to the needs of the people most affected by Covid. • Continue to populate the Community Outreach and Resource Development subcommittees. • Danielle will follow up with some members of the Judiciary Committee, the Judicial Proceedings Committee and others in order to assist in our long-term goals of implementing changes through legislation.
6.	Set Next Meeting Time and Date and Adjourn	5 minutes - JB	<p>Action List;</p> <ul style="list-style-type: none"> • Set up initial subcommittee meetings for this week or next week (while trying to avoid the holiday). Shelby McCloskey will assist in setting up the meetings and creating an availability poll for those who have signed up for the Community Outreach and Resource Development Subcommittee. • Juliana bell invites members to sign up for one of the two short-term subcommittees. <p>Juliana Bell asked if anybody had anything to add or share before we conclude this meeting.</p> <p>Juliana Bell thanked everyone for joining and suggested that the next full-committee meeting would be two Tuesdays out at 9 a.m. (will schedule after the subcommittees have met-possibly July 14th?)</p>

Guide:

JB = Julie Bell

RS = Reena Shah