



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

MINUTES

Life & Health Planning Committee Meeting

July 17, 2020

Item	Subject	Time Allotted	Notes
1.	Call to Order, Introductions and Approval of Agenda	5 minutes - JY	<p>Subcommittee facilitator Josie Yuzuik called the meeting to order.</p> <p>Josie then asked new subcommittee members to introduce themselves.</p> <p>Attendees present at the beginning of the meeting included:</p> <ul style="list-style-type: none">• Subcommittee facilitator Josie Yuzuik, Assistant Attorney General• Rexanah Wyse, Chief of Staff, U.S. Interagency Council on Homelessness.• Margaret Henn, Director, program management, Maryland Volunteer Lawyers Service• C.P. Hoffman, Legal Director, FreeState Justice.• Morris Klein, outgoing chair, MSBA Elder Law & Disability Rights Section• Shelby McCloskey, Law Clerk, University of Maryland, School of Law <p>Goal of today's meeting: Continue discussing the gaps, who is missing, future goals and projects, and flesh out the listening session idea.</p>

2.	Call for Discussion of Meeting Minutes from 2020.07.08 Meeting.	5 minutes - JY	<p>Josie discussed the need to look for a new day of the week and time for the subcommittee to meet. Suggested that we could piggy back of the L&HP meetings on Tuesdays at 10? Does not work for everyone. There was conflicts with this suggestion, so Josie proposed that the subcommittee meeting on Tuesdays at 9am every other week (in between the L&HP meetings).</p> <p>Josie asked if there were and comments to or concerns with last week's minutes? *No comments were suggested.</p>
3.	Outline Goal of Community Outreach Subcommittee	5 minutes – JY	<p>Josie reviewed the goals of the subcommittee.</p> <p>Goals: (1) Identify gaps in end of life and health planning/ probate issues that could be addressed by Legislature; present to committee as a whole for full group discussion and (2) Develop ideas for outreach events to reach various community audiences digital/non-digital (seniors, various essential workers via unions, etc., first responders) to be implemented via communication committee in conjunction with OAG communication committee.</p>
4.	<p>Discuss overlap with Goals of Resource Development Subcommittee and need for a liaison with the Resource Development Subcommittee</p> <ul style="list-style-type: none"> • Suggested legislative solutions to simplify probate and make it more accessible (ie, tangled title solutions) 	10 minutes - JY	<p>Josie explained that there is going to be some overlap between the two subcommittees so we need to discuss how we can work effectively as two different committees.</p> <p>Josie proposed there be a liaison or someone attending the other subcommittee as well to make sure we are not working in conflict with one another.</p> <ul style="list-style-type: none"> ○ Margaret’s colleague will be attending the resource development subcommittee meeting so she can touch base with him about what happens in his meetings. <p>The resource development subcommittee meeting is more focused on making document templates and developing resource guides/</p>

			handouts. Whereas, our subcommittee is more focused on how we get those documents and resources out to the people that need them.
5.	Recap of Gaps Identified at Last Meeting and Receive Feedback from New Members	10 minutes - JY	<p>Josie reviewed the gaps identified in the last meeting, including the younger population, communities who typically may feel like they've been shut out from probate or estate planning or that it's not for them, and the LGBTQ+ community who may not have trust in the healthcare system. We also talked about cultural belief and religious beliefs that might be barriers for different communities. We also identified gaps around low-wage workers, immigrants, non-English speaking individuals, and essential workers.</p> <p>Josie asked the new subcommittee members if there are any additional gaps we have not already identified. *No additional gaps were identified by the new subcommittee members.</p>
6.	Discuss Need for Listening Sessions and Logistics	10 minutes - JY	<p>Josie began discussing the idea of having listening sessions and how the subcommittee would go about organizing them. She asked the subcommittee members whether any of their organizations were doing anything similar. The idea would be to put out some type of forum to individuals so that they could provide feedback to the committee and the Task Force on estate planning and probate issues. The goal of the listening sessions is to have people voice their concerns about estate planning and what barriers they are currently facing.</p> <p>Feedback from subcommittee members regarding logistics of listening sessions;</p> <ul style="list-style-type: none"> • We could use Zoom or another video platform to hold digital listening sessions. Some organizations have held virtual workshops with a similar video platform, and it seemed to be successful. <ul style="list-style-type: none"> ◦ We may need to partner with an organization that already has a video platform service, since the free

			<p>version of Zoom kicks you off in 45 minutes and limits the amount of participants.</p> <ul style="list-style-type: none">○ Partner with an organization that has already built a trusted network, like the Women of Color Network. These organizations have more control over their platform and can offer different perspectives from a variety of communities. The Women Empowerment Network is also a good resource for people to share their stories of discrimination and barriers they have experienced.• Work with emergency shelters to be able to disseminate information to communities.• Need to have a good moderator to field questions and ensure that people are not talking at the same time and that the attendance is taken.• Concern: One problem with Outreach that organizations are facing right now is that a lot of people are not really focused on their legal issues at all right now because they are focused on things like food insecurity or unemployment.• Avoid having in-person listening sessions at this time.• Call interviews to hear older adults' stories about their estate planning experiences.• For business calls, Zoom or similar platforms allow you to dial in using a phone. This could offset the issues of individuals not having access to the internet or computers or feel uncomfortable using said technology.• FreeState conducted a statewide needs assessment a couple of years ago to assess the legal needs of the lgbtq+ community. The assessment showed, among other things, the Discrimination transgender individuals experience when they deal with medical professionals.
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			<ul style="list-style-type: none">• Is there a way to do a survey or a mini needs assessment to help understand how people are being affected right now?<ul style="list-style-type: none">○ Perhaps we could partner with some sort of free conference line.○ Team up with the other committees in the Task Force to send out a survey.○ While on hold for an attorney at MVLS, maybe we could add a message regarding the listening sessions.○ Reach out to Maryland legal aid to see if the senior legal helpline could be a way to get the information about the listening sessions out. Reach out to organizations that assist different communities like the low-wage workers, caretakers, vulnerable adults, those taking care of vulnerable adults, and non-English-speaking. One possible legal service provider to help the immigrant community is Esperanza Center.• Use a conference line provided by the Attorney General's office. These lines can hold up to X number of people so that we can hold these kinds of listening sessions around different regions in the state. Again, it is very important to have a strong moderator if we want the listening sessions to be productive.• Concern: How will we advertise these listening sessions?• Concern: How do we get people interested in attending the listening session? How should we frame the message to ensure attendance (ex. Generational wealth and legacies).• Have organizations begin pushing messaging to clients about ADs and other estate planning documents while providing other legal services.• Team up with healthcare providers like Chase Brexton to try to run medical legal partnership sessions on why it's important to
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			<p>have advanced directives and other estate planning documents.</p> <ul style="list-style-type: none">○ Can use the email lists and medical networks already in place by these healthcare providers to advertise these partnership sessions.○ There are currently legal medical partnerships in Boston and San Francisco specifically geared toward the legal needs of older adults.<ul style="list-style-type: none">▪ Perhaps, making a similar partnership could be a long-term goal of the subcommittee; whereas, the listening session type outreach could be a shorter goal for the subcommittee.○ Whitman-Walker has a very integrated medical service system centered on services for the queer community.○ The University of Maryland, School of Law has a clinic, the Medical-Legal Partnership Clinic, which represents individuals with HIV in both litigation and non-litigation matters. Kennedy Krieger Institute also has a small clinic for clients with disabilities. There have been no Maryland partnerships or clinics that have been mentioned that focus on older adults.<ul style="list-style-type: none">▪ Josie asked if anyone could reach out to these organizations so that they could join an upcoming meeting and provide insight on this issue. <ul style="list-style-type: none">● Invite healthcare providers to the call so that they can assist in our outreach efforts. Doctors and nurses could share their stories of what happens when their patients did not have an advance directive or a different estate planning document.● Have essential/ frontline workers tell their stories.● Need to broaden the perspectives to help people understand why estate planning matters.
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			<ul style="list-style-type: none"> Concern: How can we encourage people to call into the listening session who are not currently seeking legal advice? How do we show them that it is important?
7.	<p>Call for Volunteers to Coordinate Each Session</p> <ul style="list-style-type: none"> Younger persons-ADs, POAs, estate planning document Cultural and Religious Barriers to Access LGBTQ Community Low Wage Workers Any others? 	10 minutes - JY	<p>Josie stated that the subcommittee may not be ready to discuss this today. We will put this on the agenda for next time with a larger group. Ideally, the volunteers would help identify potential partners for the listening session and assist in getting the word out to the communities. We would utilize other committees in the Task Force to assist in this endeavor.</p>
8.	<p>Set Next Meeting Time and Date and Adjourn</p>	5 minutes - JY	<p>Josie thanked everyone for their thoughts throughout today's meeting and asked if anyone had any other questions or comments before we adjourn and set next week's meeting time? *No additional comments were added. Josie asked for suggestions to next week's agenda, but stated that it would probably be close to this one. Next meeting, we will pick up on the call for volunteers and getting additional input on who might be missing from the conversation.</p> <p>For our next subcommittee meeting, we are going to shoot for Tuesday, July 21st at 9 a.m. depending on when the next full committee will meet.</p> <p>Josie asked the subcommittee members to keep an eye out on their email to see when exactly the next meeting will be.</p>

Guide:

JY = Josie Yuzuik, Community Outreach Subcommittee Facilitator