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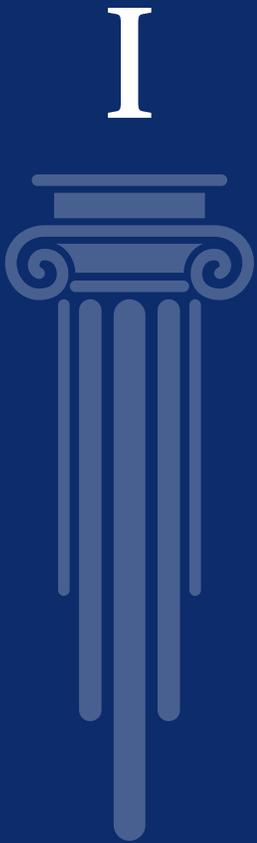
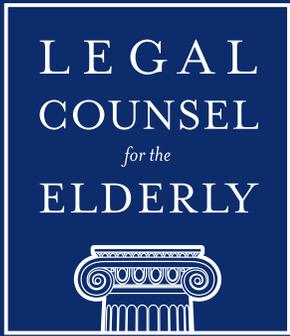
Legal Counsel for the Elderly

STRATEGIC PLAN

2024-2027

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INTRODUCTION

The Legal Counsel for the Elderly (LCE) 2024-2027 Strategic Plan was developed over an eight-month collaborative effort involving Board, Management, and Staff. Throughout this process, LCE evaluated current environmental trends, as well as organizational strengths and capacity, to identify its areas of focus for the coming four years. **The strategic priorities fall into two categories: programmatic and capacity building.** These priorities reflect the most pressing areas impacting LCE’s clients and those to which LCE is uniquely positioned to respond.

Six strategic priorities will guide LCE’s 2024–2027 work:



MEETING MORE CLIENTS WHERE THEY ARE



MULTI-PROFESSIONAL/ WRAPAROUND SERVICES



MEDIA AWARENESS



ECONOMIC SECURITY

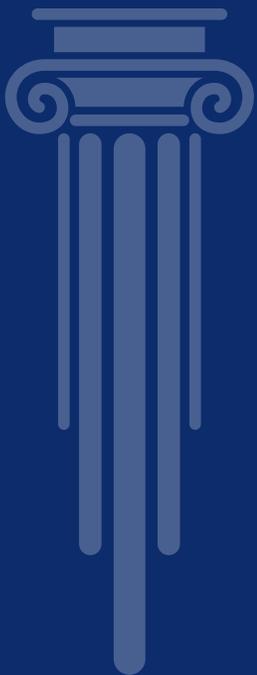


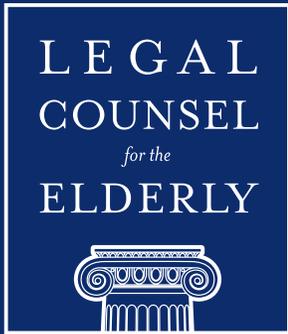
HOUSING



LONG TERM CARE

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II



MISSION STATEMENT

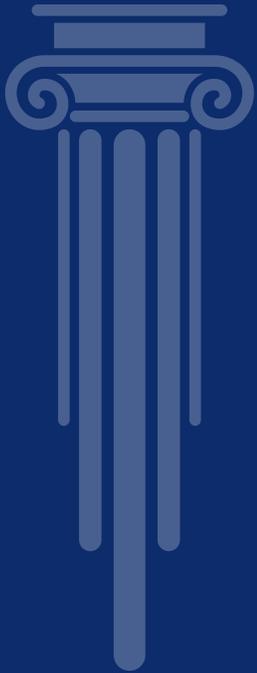
The mission of LCE is to champion the dignity and rights of Washington D.C. elders by providing free legal and social work services to those in need - empowering, defending and protecting vulnerable seniors.

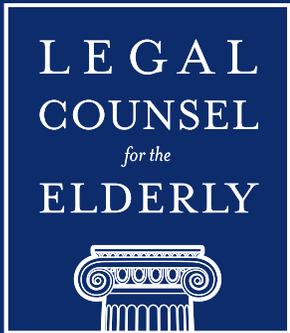
VISION STATEMENT

LCE's work is in service of its vision, a society where all seniors are empowered to live equitably with affordable housing, economic security, and fierce legal representation.

CONS	Consumer Advocacy and Homeownership Preservation	LTC	Long-term Care
DEV/ COMMS	Development and Communications	OMB	Ombudsman
DHCD	Department of Housing and Community Development	OPS	Operations
EHS	Economic and Healthcare Security	PBAJ	Pro Bono Access to Justice
HOT	Legal Hotline	TAS	Tenant Advocacy and Support
LCE	Legal Counsel for the Elderly	TODD	Transfer on Death Deed
		VASH	Veterans Affairs Supportive Housing
		\$\$\$	Significant investment, likely a new FTE

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GUIDING PRINCIPLES

In the process of developing strategic priorities, three guiding principles emerged. These guiding principles are key concepts or frameworks that will inform and be woven throughout the implementation of LCE’s strategic priorities over the next four years.

RACIAL EQUITY

LCE will promote racial equity internally and externally in its interactions and in support of its client community with a focus on empowering clients for whom race-based considerations may have denied or diminished their opportunities to fully participate in developing economic security. Embedded within each strategic priority, LCE will articulate related strategies for addressing systemic injustice, oppression, or inequity.

CROSSCUTTING AND COLLABORATIVE WORK

This strategic plan will bust through silos and harness the power of every member of the organization to address the most critical issues seniors face at this moment. Every program area will have a clear role in contributing to each of the priorities, even if some of the priorities (e.g. Media Awareness, Long Term Care) may have a natural champion.

USE OF DATA TO INFORM ACTION

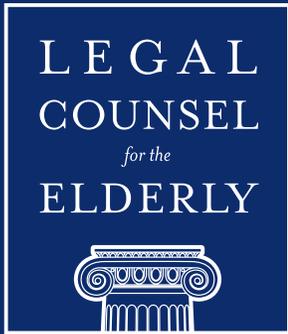
Thoughtful collection, analysis, and application of data is core to LCE’s success, the use of data should be a means of advancing all of the strategic priorities.

Naming data as a principle presents an opportunity for LCE to survey the data needed to inform its work. What data does LCE currently collect that may be unnecessary? How can everyone at LCE be better informed about the data LCE possesses? What new data must LCE collect to strengthen its work? How can current and future data collection more effectively inform decision-making processes?

Action planning for each strategic priority will include explicit attention to how data will be used to support success, including: how data might help drive solid decision-making, establish how resources are allocated, generate financial and public support for LCE’s cause, and measure client and community outcomes.

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STRATEGIC PRIORITIES, STRATEGIES, AND SUCCESS MEASURES

The **Strategic Priorities** are organization-level goals that are broad but directional. They take into account mission, vision, and values, and answer questions like, “what do you want to get done in the next few years?” The Strategic Priorities are divided into **Capacity Building** and **Programmatic**. Each strategic priority is followed by **Strategies** or a compilation of actions the organization will take to achieve a strategic priority. LCE continues to center racial equity in its work and explicitly expresses this commitment by incorporating racial equity strategies into the strategic plan. A data strategy is also a part of each strategic priority. Tactics are specific activities that make the strategy happen. The tactics, timelines, persons responsible, and evaluative milestones will be developed annually by staff from each LCE practice area. The **Success Measures** enable the organization to concretely evaluate how it is performing against the strategic plan.

CAPACITY BUILDING PRIORITIES

LCE’s capacity-building priorities are an investment in organizational growth and sustainability. These priorities will strengthen the organization’s ability to deliver on its mission of championing the dignity and rights of Washington, D.C. older adults.

PROGRAMMATIC PRIORITIES

Programmatic priorities are areas in which LCE currently works, but in which efforts to date have been held by a subset of the organization’s practice areas. By articulating these strategic priorities, LCE is stating an organization-wide commitment to working more holistically, collaboratively, and innovatively to increase impact.

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MEET MORE CLIENTS WHERE THEY ARE

PRIORITY STATEMENT

We will broaden our reach by improving access to LCE services, increasing our systemic advocacy and prioritizing cases that have the potential for far-reaching impact.

STRATEGIES

- Increase LCE's physical presence in the community, including long-term care facilities with a focus on underrepresented populations
- Refine targeted outreach, aiming for earlier intervention
- Leverage the expertise and connections of the Community Advisory Council to improve our outreach
- Prepare staff to meet clients where they are (including emotional, non-tangible needs)

Racial Equity

Increase staff's cultural awareness and sensitivity to relate effectively to clients and understand their lived experiences.

Use Data

- Utilize mapping tools and demographic information to identify underserved geographic areas
- Utilize public-facing mental health data to determine ways to reach populations experiencing mental health challenges

Context

LCE will increase its presence in the community. Doing so will include bringing information about advocacy wins directly to the community members who may not know their rights, as well as more on-the-ground promotion of LCE services.

CAPACITY BUILDING PRIORITIES

Lead Practice Areas: All

SUCCESS MEASURES

- Increase the number of cases that have an impact beyond a single client
- OMB will increase its regular presence in Community Residential Facilities from 30% to 50% by 2027
- Increase the number of people we interact with at outreach events from underrepresented populations and geographic locations utilizing data mapping tools
- Increase our physical presence in wards where we currently do not have a sufficient presence based on the percentage of older low-income adults in that ward
- Continue and sustain relationships with long-term care facilities with a point of contact at each facility for life planning and other legal assistance referrals
- Train 80% of staff and volunteers on Trauma-Informed Care, Mental Health Crisis Intervention, De-Escalation Techniques, Cultural Awareness, and Racial Equity, every other year

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INCREASE MULTI-PROFESSIONAL WRAPAROUND SERVICES

CAPACITY BUILDING PRIORITIES

Lead Practice Areas: TAS, EHS, CONS, HOT, OPS

PRIORITY STATEMENT

We will address clients' complex concerns and improve client outcomes by expanding our capacity to include social workers and other paraprofessionals, whose specialized training and expertise will augment the delivery of legal services.

STRATEGIES

- Increase engagement of social workers, navigators, client empowerment specialists, and paralegals to offer a more holistic approach to effectively serve and empower LCE clients (\$\$\$)
- Identify opportunities to collaborate with local educational and workforce institutions
- Tell the story of improved client outcomes in a way that demonstrates the need for increased funding for paraprofessional staff
- Enhance collaboration with other non-legal organizations that offer wraparound services

Racial Equity

Recruit staff and volunteers who can demonstrate they are able to appreciate the diverse cultures and lived experiences of our clients.

Use Data

- Perform an internal “work study” to identify how attorney time is spent and what may be replaceable by non-attorney staff
- Conduct internal “needs survey” developing data to guide the targeting of wraparound resources

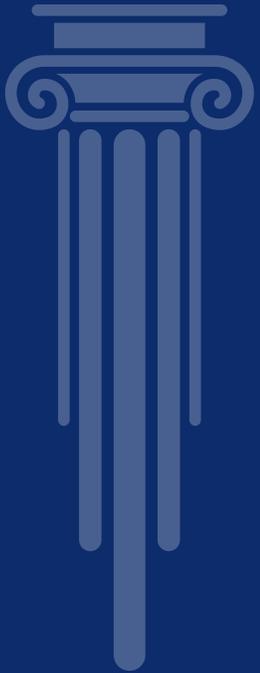
Context

LCE attributes its success to collaboration between lawyers and nonlawyers to holistically address the critical needs of DC's older adult population. Social workers, navigators, and client empowerment specialists offer expertise that complements LCE's legal services to more fully support clients who experience poverty.

SUCCESS MEASURES

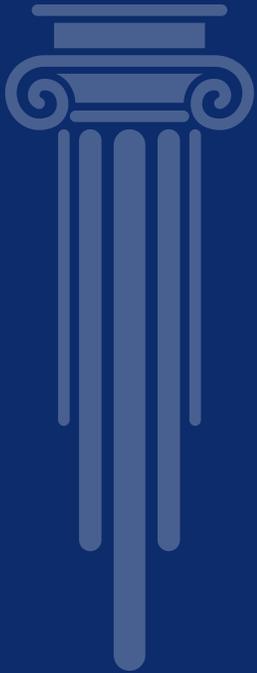
- Refine systems to capture non-legal services delivered by paraprofessionals by 2025. Deliver increasing levels of services in 2026 and 2027
- For eligible cases, explore establishing office-wide paraprofessional support to provide direct client services under attorney supervision
- Using anecdotal information from clients gathered through brief surveys following representation, assess the value added to clients from services provided by paraprofessionals to inform the decision to continue these positions within LCE
- Increase collaboration with non-legal organizations to facilitate increased wraparound services for DC's older population

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MEDIA ATTENTION AND PUBLIC AWARENESS

PRIORITY STATEMENT

We will use paid and earned media, and other communication tools, to highlight LCE's work and the issues LCE addresses to advance our advocacy agenda and to raise brand awareness, leading to more potential clients, increased financial support, and mobilized partners.

STRATEGIES

- Identify and develop client stories that highlight key programs, shore up partnerships, and illustrate advocacy priorities
- Promote LCE advocacy priorities through media opportunities
- Get more long-term care residents to tell their stories and solicit client testimonials at the conclusion of all services
- Identify emerging issues impacting low-income seniors in the District to assess the viability of employing media to advance solutions

- Showcase LCE leadership and success on key issues to identify opportunities for increased funding for under-resourced areas
- Leverage LCE external events to strengthen LCE brand awareness, garner media attention and cultivate individual supporters

Racial Equity

Ensure that all external communications of our client community align with LCE's racial equity values while combating negative racial stereotypes.

Use Data

Use client demographic information to illustrate who we are serving, where we are serving them, and to describe the impact of our service through client pictures and stories in oral and annual reporting and media events.

CAPACITY BUILDING PRIORITIES

Lead Practice Areas: DEV/COMMS

Context

LCE will sharpen brand awareness to establish itself as a trusted partner and nonprofit in DC, focusing on reaching core audiences such as donors and potential partners to cement LCE's reputation as one of the most trusted nonprofits in DC.

SUCCESS MEASURES

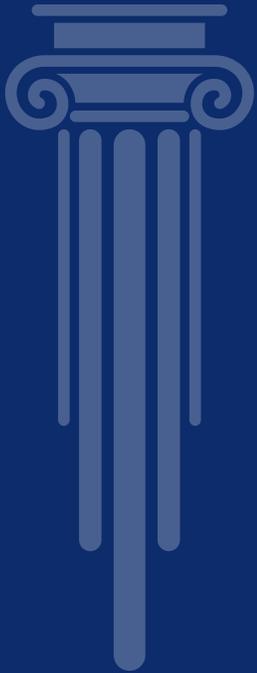
- Reach 30 million impressions through paid media to increase LCE's brand awareness
- Develop an organized repository of diverse client stories, photos, and testimonials that is updated continuously, including adding two new videos, and one client story with a photo per practice area annually
- Promote at least 2 advocacy/systemic issues annually through paid and/or earned media

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ECONOMIC SECURITY

PRIORITY STATEMENT

We will expand economic security by developing innovative and holistic strategies across LCE that honor the clients' independence.

STRATEGIES

- Expand financial benefits screenings and make referrals, as appropriate
- Advocate for legislative change to protect income/assets, including collaborating with AARP and DC community partners
- Emphasize OMB referrals to EHS, when appropriate
- Explore and implement proactive steps that promote economic security and prevent financial exploitation

Racial Equity

Advocate for systemic solutions to address the impact of past racial discrimination faced by our client community that decreased access to financial resources and opportunities.

Use Data

Track financial benefits across all practice areas by creating consistent data capture practices and analyze this data to identify where there may be missed opportunities to provide greater economic support.

Context

A holistic approach to economic security includes both addressing a client's presenting issue and recognizing related needs and providing support where possible. The intent is for clients to achieve greater economic stability and feel satisfaction that their primary and underlying needs were addressed.

PROGRAMMATIC PRIORITIES

Lead Practice Areas: PBAJ, EHS, CONS, HOT

SUCCESS MEASURES

- Increase the total number of clients we help with economic security issues by 7% by the end of 2027
- Obtain \$100 million in benefits for clients by the end of 2027
- Engage with AARP and other community partners on specific policy or legislative changes in social security, SNAP, and financial and other non-monetary benefits policies
- Engage in advocacy with DC agencies to increase the amount of benefits available to DC seniors



IV



HOUSING

PROGRAMMATIC PRIORITIES

Lead Practice Areas: EHS, CONS, HOT, TAS, OMB

PRIORITY STATEMENT

We will address persistent inequity in housing by advocating for strategies to increase and improve affordability, accessibility, and quality of housing across DC.

STRATEGIES

- Moving from reactive to proactive litigation (\$\$\$)
- Engage in advocacy to increase the supply of affordable, accessible, and safe housing as well as the supply of affordable assisted living facilities
- Strengthen collaborations with agencies and community partners regarding heirs property issues
- Preserve legislative “wins” relating to housing issues
- Strengthen consumer protections for homeowners and enhance community educational outreach
- Reduce barriers to accessing assisted living residences and quality rental housing

Racial Equity

LCE will advocate for practices and programs to reverse the effects of historic racial discrimination and will pursue partnerships to promote laws, policies and procedures that increase quality, affordable housing.

Use Data

- to identify the 60-plus homeowners for TODD outreach
- to identify targets for affirmative litigation
- to identify location of affordable unit set-asides (from DHCD)
- to identify Medicaid supported assisted living facilities
- to identify number of beds that come online

We will explore ways to work with the AARP data team to identify the source and collect data needed.

Context

In the process of planning, LCE leadership deeply considered DC’s “housing stock” and the need for measures in addition to advocacy to address the lack of affordable housing and the rise in senior homelessness. Some measures that would support LCE’s work in the area of housing may be outside LCE’s mission, and the need for clarifying what strategies should be done in partnership with other organizations is an important part of addressing this strategic priority. Additionally, elements of this priority overlap with the Long-term Care strategic priority as housing shortages also apply to nursing facilities.



IV



HOUSING

SUCCESS MEASURES

- A significant increase in affordable assisted living beds/residences
- District-level advocacy will retain and build the supports older adults need to maintain stable housing through LCE's active participation in every Council session
- Discernable shift towards proactive litigation on behalf of tenants
- Begin assisting homeless veterans in applying for VASH vouchers and increase the number of veterans served annually
- Create new collaborative initiatives with District agencies on behalf of heirs, tenants, and homeowners
- Develop new resources/supports for case types that are difficult for LCE to take for full representation (e.g., housing conditions, evicting unsafe roommates, requests for reasonable accommodation)
- Preserve homeownership for 260 clients and stop 525 tenant evictions

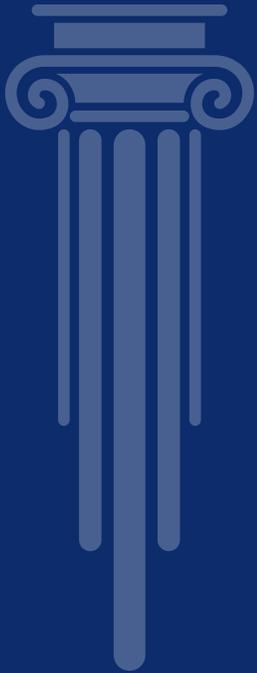


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LONG-TERM CARE

PRIORITY STATEMENT

We will improve the quality of care and quality of life for individuals receiving LTC services in facilities and the community.

STRATEGIES

- Increase internal referrals within LCE between our OMB team and the legal practice areas to provide holistic supports to LTC residents
- Promote cross-education and collaboration among legal practice areas and OMB
- Address barriers to providing legal services to LTC residents
- Ensure that people with disabilities can live in least restrictive settings (Olmstead)
- Promote autonomy by increasing access to alternatives to guardianships and challenging guardianships

Racial Equity

Advocate for policies and funding that address health inequities created by systemic racism in accessing long-term care services and supports.

Use Data

- to track holistic referrals between Legal and OMB and determine where there may be additional opportunities for service
- to track the number of Medicaid-eligible assisted living beds to inform policy priorities

Context

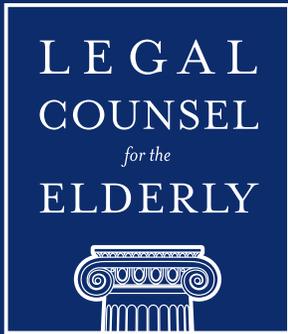
Caregivers are an important part of the LTC ecosystem, and their need for support was considered as part of this priority area. However, LCE decided that concentrating on clients receiving services would prevent potential conflicts in service provision.

PROGRAMMATIC PRIORITIES

Lead Practice Areas: OMB, EHS

SUCCESS MEASURES

- Maintain a resolution rate of over 80% for all complaints investigated
- Increase the number of Health Care Decisions presentations to at least one presentation at each nursing home in the District by the end of 2027
- Increase the number of persons that LCE assists with transitioning from long-term care facilities to less restrictive environments in accordance with the District's Olmstead Plan
- Expand LCE's guardianship practice to defend against guardianships
- Begin recovering the cost of representation from the Court for taking on guardianship appointments via their panel



V



THANK YOU

The Legal Counsel for the Elderly (LCE) 2024-2027 Strategic Plan was developed through an eight-month collaborative effort involving the LCE Board of Directors, Advisory Committee, Management Team, and Staff.

Special thanks to Karen Ellis Carr and Patrice J. Harris for their leadership in this effort and the entire Board of Directors and Advisory Committee for their hard work and dedication in developing the Capacity Building Strategic Priorities and providing invaluable feedback on the Programmatic Strategic Priorities.

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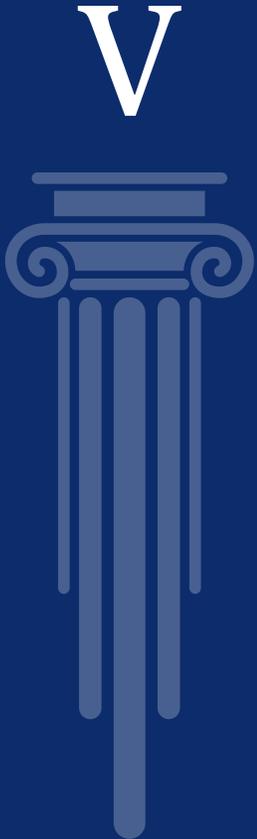
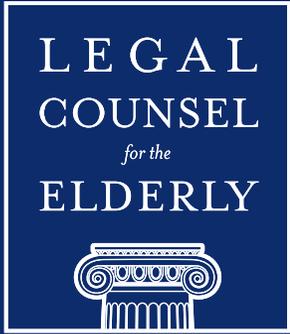
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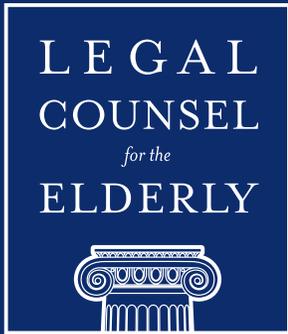
Adrian L. Steel, Jr, Mayer Brown LLP



THANK YOU

A debt of gratitude is extended to Consultants Michelle Levy and Emily Norton of Co-Lab Consulting for their leadership and guidance in developing the LCE 2024-2027 Strategic Plan.





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aarp.org/LCE
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 /LCEinDC
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Do you know an older adult in DC who needs legal help?
Suggest they call the LCE Hotline: **202-434-2120**
All calls are confidential.

Residents of long-term care facilities and their family members in need of an advocate can contact the LCE Office of the DC Long-Term Care Ombudsman:
202-434-2190 | DCOmbuds@aarp.org
All calls and emails are confidential.

Would you like to partner with LCE to support our work?
Please contact Billy Fettweis, Director of Development and Communications:
202-434-2386 | wfettweis@aarp.org

LCE is part of the Senior Service Network

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