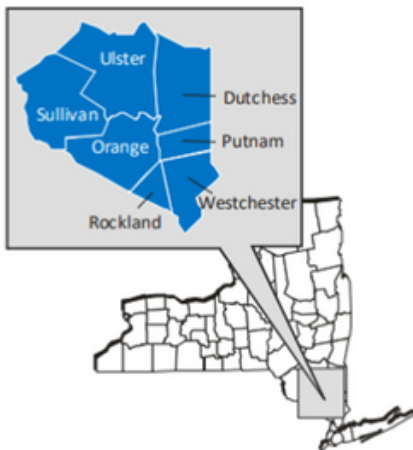


LEGAL SERVICES OF THE HUDSON VALLEY

2022-2023

OVERVIEW OF ACHIEVEMENTS

During the IOLA year ending 3/31/2023, we conducted 19,123 intakes from our seven-county service area and made 7,016 non-case referrals for applicants not eligible for our services. We target low-income and vulnerable households within our seven Hudson Valley counties. Of the 13,302 cases we handled, we closed 7,631 cases with legal assistance, conferring at least 10,463 distinct legal benefits on an estimated 17,219 individuals. In the process, we saved more than \$120,000 in filing fees for our indigent clients. Volunteers provided 8,768 hours, representing nearly 6 full-time staff equivalents, with pro bono attorneys closing 293 of the legal cases. Our Pro Bono Unit has succeeded in implementing a brief service clinic model in which larger private law firms, whose volunteer attorneys are trained by our staff, meet with our clients virtually by appointment to provide housing law advice. We also provided valuable advocacy and housing counseling services, inter alia, closing an additional 1,526 nonlegal cases not reflected above: Medicare Long-Term Care advocacy that conferred over \$2.3 million in benefits, housing counseling, SSI application filings, and in cases opened in which the intakes and sometimes research were provided in which clients failed to follow up or pursue their legal options. Beyond casework, we provided legal information and education to an estimated 44,696 community members and their providers to foster knowledge and self-help through plain language and video legal guides shared with LawHelpNY and posted to our website, through legal education brochures, and through clinics and virtual presentations over Zoom and live stream platforms. We continue to make strides in our systemic initiatives, invited to and participating in the NYS Attorney General’s meeting on justice court issues. We initiated and continue to lead the statewide Systemic Housing Working Group in monthly meetings to formulate systemic approaches to address housing issues.



Population Served: General Low Income Population

Total Funding: \$25,519,398

Total IOLA Grant: \$2,200,000

Staffing Full Time Equivalents:

- Total Staff: 203
- Paralegals: 56.45
- Lawyers: 112
- Other: 34.55

DIRECT LEGAL SERVICES: CASES

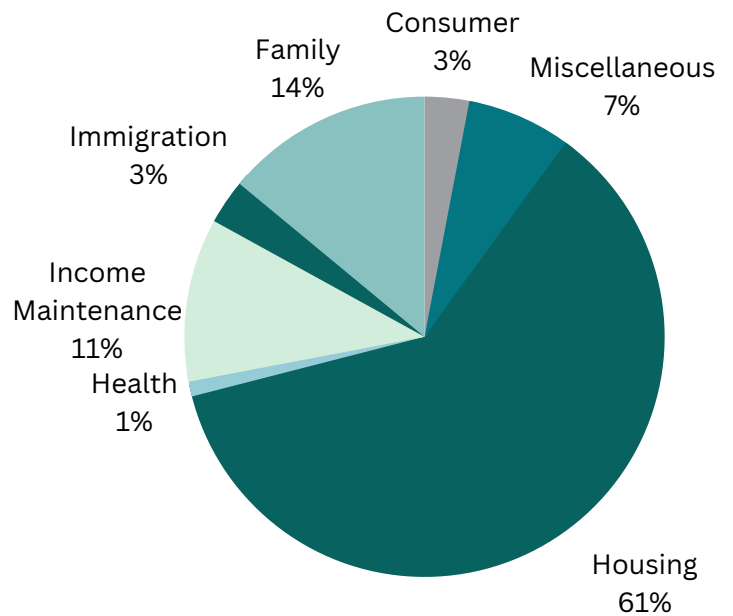
Income Maintenance

An elderly male, HIV-positive and frail client living with physical disabilities came to us in May 2022 requesting assistance because he was notified of an alleged overpayment from SSI due to having more than \$2000 in resources. Our client had requested a conference with Social Security Administration (“SSA”) and the phone call was scheduled for July. In preparation for that phone call, our attorney reviewed the SSI notices as well as the client's bank statements. The bank statements showed that he did not have over \$2,000 in resources and that SSA had made a mistake. On the call with the SSA in July, our attorney explained the situation and provided calculations. We sent a copy of the client's bank statements to the SSA from the months in dispute. Later in July, the SSA issued a letter advising that the matter had been resolved and there was no overpayment. The client is back to receiving his full SSI benefit.

Housing

Client is a senior citizen who has lived in public housing for 10 years and has never fallen behind on his rent payments before. The client lives alone on a limited income and his rent is only \$290 a month. Unfortunately, the client became overwhelmed by his bills during the COVID-19 pandemic, largely a result of providing financial assistance to his son’s family during a time of need. The client’s son had fallen extremely ill from cancer, before eventually passing away. The client had sent money to his son's family, and then again to help pay for his son's funeral when he passed away.

17,219
people
benefitted from
7,631
legal cases
closed



**Cases by
Legal Problem Area**

The client was referred to DSS for assistance, and they were willing to assist the client with 6 months of his rental arrears owed, but client owed approximately 10 months. The client would be unable to find affordable rent if he were to lose his current residence. We assisted this client with legal assistance in preserving his permanent housing, but with DSS only able to provide 6 of the 10 months of rental arrears, our staff was able to secure rental arrears funding from one of our internal programs for the balance so client will be able to remain in his subsidized public housing, and should have no problem continuing to pay his rent, as he has been for the past 10 years.

OTHER SERVICES: OVERVIEW

Other services are comprised of three types: outreach (reaching target populations in need), community legal education/pro se assistance (providing substantive and procedural facts about the laws and legal process), and networking (forging relationships with other community service providers/entities to spark bilateral referrals for holistic solutions to a household's problems, and open up opportunities to train providers and their clients on trending legal issues). In order to expand our reach to help as many households as possible, our attorneys attend the numerous task forces (networking) in our service area. These

collaborations assist providers, and our own staff, in sharing and identifying the current obstacles faced by our target populations and while we raise our visibility and profile that prompts referrals from those same providers. Networking efforts lead to discussion and opportunities for training other providers' staff and their clients in identifying legal issues and those steps that can be taken to avoid litigation, or when it is time to call us for our services. Attorneys and paralegals frequently speak at community meetings (outreach) and trainings (community legal education), this year reaching nearly 1,000 individuals through such events, whether virtual or in person. We reach an even greater number of households in need with our online self-help legal guides, shared with LawHelpNY, our own website and our YouTube and social

44,696
people
benefitted from
Services Other
Than Direct
Legal Services

media outlets, all of which logged over 43,000 views. Our front desk receptionists and intake paralegals are trained to offer direction to ineligible applicants for alternative assistance, e.g. 21 ineligible applicants were provided verbal information on topics that included housing, family, health, consumer, and miscellaneous legal categories. Lastly our staff produced at least 18 new know your rights materials covering a wide variety of civil legal services’ areas. We conduct systemic advocacy to ameliorate problematic court practices or conditions for our clients; we selectively file amicus briefs to advocate for justice for our target populations.

Number of People Benefitted from Other Services



OTHER SERVICES: TECHNOLOGY

Working towards the goal of having a Cisco Meraki environment, we started by upgrading two firewalls and eighteen access points with more installations planned in 2023. We also implemented Sentinel One vulnerability scanning that interacts with our Perch sensors, along with a new Tenable Monitoring Dashboard Module to track possible cybersecurity threats and issues. We continue to use Mimecast as our spam filter and mandate KnowBe4 security awareness training. We implemented Multi-Factor Authentication on all Microsoft 365 accounts along with our third-party accounts payable software and Meraki access. We adopted the cloud-based version of our accounting software and kicked off our SharePoint project to migrate all documents on our on-premises server to SharePoint Online. We deployed 85 new Lenovo E14 Laptops to end users, eliminated all T430 laptops, and continue to decommission out of warranty desktops.

OTHER SERVICES: TRAININGS

Our Chief Program Officer conducted a comprehensive two-day training of all paralegals in our organization, covering the following topics: Client Interviewing, Housing Law, Orders To Show Cause, and Leadership Skills, and brought in our Social Worker Supervisor to present on eliciting best case results from clients in trauma. Materials are saved for their future reference. Our program supervisors conduct regular case reviews with attorney case handlers and identify needs or opportunities for training to deepen or broaden their practice capabilities. We offer a holistic array of training to our staff to equip them in many ways, with (1) understanding new research, law and court processes and using them strategically (2) improving litigation skills; (3) broadening practice area training, i.e., the intersection of different practice areas; (4) understanding the needs of special populations, i.e., the needs of the elderly, the veteran client, LGBTQ client, or client in trauma; (5) a broad range of diversity, equity, inclusion and belonging (DEIB) trainings to ensure provision of compassionate and culturally and linguistically sensitive services and promote strong bonds among the staff. As an accredited CLE provider, staff can earn a portion of their biennial requirements through some of our in-house trainings, or through our organization's subscription CLE services. Our organization conducted our normally scheduled "All Staff Days" virtually in December 2022, featuring a mental health and wellness presentation by Mike Veny, Certified Corporate Wellness Specialist. This was followed by a program in which our Family Defense Unit presented its work to the staff on representing parents whose children were taken from them during the investigation stage of CPS process, describing its challenges, its successes, and the importance of this first-in-the-state pilot project. In addition to onboarding instruction for new members, our Board is also offered periodic training: (1) a DEIB module; (2) certain practice area presentations on the needs of the community; and (3) guided instruction in understanding our financial statements and returns. Working towards the goal of migrating all documents from our on-premises server to SharePoint Online, there has been periodic training of all staff. Staff are mandated to complete annual security awareness and cybersecurity training. We train staff in accurate use of case data inputs.

IMPACT CASES

Hudson Valley Property Owners, et al. v City of Kingston, et al.

Subject: Owners’ contention that ETPA was not validly adopted.

Milestones: Our motion to intervene was granted and decision rejected owners’ contention.

Impact: Estimated 1,200 households in Kingston, estimated 3,000 household members.

Matter of anonymous

Subject: Financial crimes and public housing tenancy with an abuser.

Milestones: Obtained Order of Protection on the financial crime and obtained bifurcation of valuable housing tenancy, preserving the victim’s housing rights. Financial crimes in family court are often ignored.

Impact: Estimated 25 households, estimated 62 household members.

Aguilar v Zachary

Subject: Evicting tenants when property owner failed to abide by city’s rental registration requirement.

Milestones: We obtained a decision dismissing the eviction action based on that failure.

Impact: Estimated 100 households, estimated 250 household members.

All Impact Cases

Hudson Valley Property Owners, et al. v City of Kingston et al.

Tarsha Bethea v Thomas Horton

Beneficial Homeowner Service Corporation v Raymond Horan, et al.

Matter of anonymous (four cases)

Aguilar v Zachary

Matter of anonymous

Matter of Lisa Rebillard v Meadow Ridge

Shickle v Rooney-Renya

Sherrian Grant v BC Park

Hudson Valley Property Owners, et al v City of Kingston, et al

Kaal Rock v Joan Killmer

Beneficial Homeowner Service Corporation v Raymond Horan, et al

U.S. Bank v Helen Dallas

Matter of overcharge complaint of Waverly Arms

Saint Michael’s Home v Michael Valmas

6,870
beneficiaries were affected by
18 Impact Cases

PRO BONO VOLUNTEERS

Achievements: Our Pro Bono Unit logged 8,768.10 volunteer hours during the year. Through our involvement with the NYS Business Council, forming meaningful partnerships with several large law firms allowed us to create a Housing Brief Service Clinic. We direct eligible clients to biweekly, virtual advice and brief service clinics staffed by volunteer attorneys from these law firms, trained in housing law by our Pro Bono Coordinating Attorneys. Volunteer attorneys identify defenses and counterclaims and provide brief service to tenants facing eviction. On occasion, volunteer attorneys agree to negotiate settlements and/or provide full representation at court.

Recruitment: We and our clients benefitted from a round of Pro Bono Scholars from Pace Law School and Touro Law School. We continue recruiting volunteer attorneys to assist with all civil legal issues affecting low-income and vulnerable residents in our seven-county catchment area. Our large law firm bonds have continued to produce volunteer attorneys for training on housing law to staff the biweekly Housing Clinic for our clients.

Training: During this period, we trained 67 attorneys in CLE accredited sessions, all having to do with housing law and eviction defense. Half of the training was in virtual format, while the other half was in person. One of the sessions was conducted after our Westchester-based Pro Bono celebration, partnering with the County to publicize the training event on Eviction Defense.

Deployment: Given the increase in housing matters, our Pro Bono Unit continued to focus on recruiting pro bono attorneys to assist us in meeting the pressing need to assist our service area in housing court matters.



212 Attorneys volunteered 3,699 hours

19 Law Students volunteered 4,688 hours

7 Other Volunteers volunteered 381 hours

Each  icon is equal to 23.8 volunteers.

Attorneys are represented through the Green Figure.

Law Students and Other Volunteers are represented through the Grey Figure.

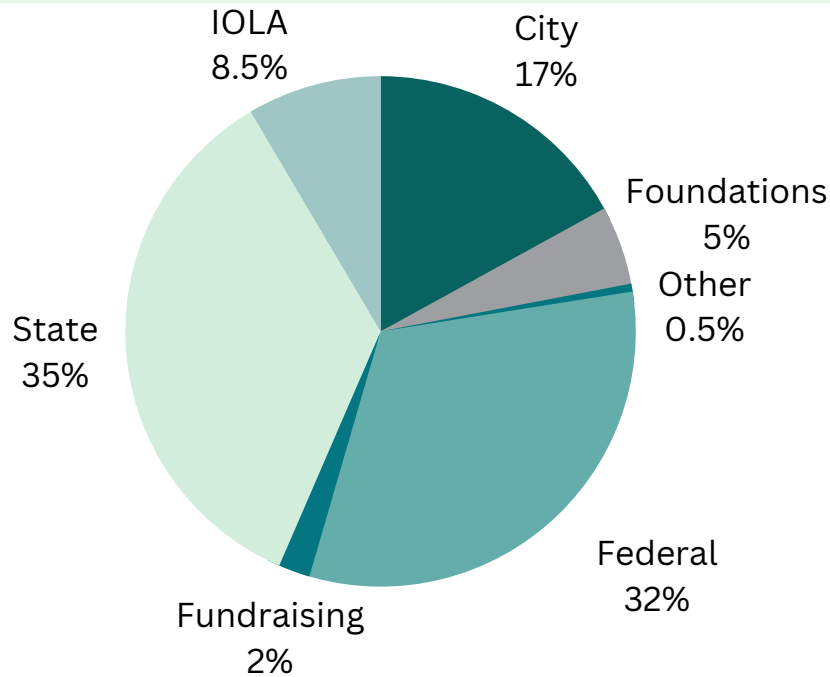
SIGNIFICANT COLLABORATIONS

During this reporting period, we nurtured vibrant collaborations with New York City legal services providers through discussions about litigation on statewide issues, benefiting our practices and our clients. Upon notice of award by HUD for a Dutchess-based eviction defense project, we subcontracted with Community Voices Heard for door knocking, flier distribution and other outreach services for the project and with Hudson Valley Justice Center to serve clients ineligible for our services or that exceed our capacity. As LawHelpNY Advisory Committee members we have been actively collaborating with LawHelpNY in their efforts to redesign their website and refresh their legal resources, by delivering new legal education materials, and by providing technical assistance through reviewing and updating existing legal resources, ensuring that all materials are in plain language. We also have reaped the benefits of our Pro Bono Director's connection to large law firms affiliated with the New York State Business Council. Our robust collaboration with Fried Frank; Cadwalader, Wickersham & Taft LLP; and Paul, Weiss, Rifkind, Wharton & Garrison LLP enabled us to launch our Housing Brief Services Clinic. In addition to providing advice and brief service in a virtual setting, on occasion, volunteer attorneys agree to negotiate settlements and/or provide full representation in the court case.

Our Pro Bono Unit continues its involvement with Public Interest Pro Bono Association, a NYC-based association of pro bono professionals overseeing pro bono programs at nonprofit and public interest law organizations, and with Pace University's Elizabeth Haub School of Law and Touro Law Center, both of which are conduits for our successful Pro Bono Scholar program. We collaborate with other community providers, either by subcontract or a bilateral referral system, to promote access or to needed legal services for those we are unable to assist. Collaborators include legal services providers Hudson Valley Justice Center, Legal Aid Society of Rockland County, and Family Legal Care, or special population supportive services that include Family Services of Westchester supporting HIV-affected households, victim assistance providers in our area for shelter and other support services, CHOICE for those living with mental health disorders, Adult Protective Services for hoarding holdover cases. Moreover, our housing counselors assist in attaining positive outcomes in our eviction cases by locating other sources of rental arrears and housing, such as Bridge Fund, CLUSTER, and DSS offices. These are just a few of the many networking systems we've developed in our 50+ years of operation. We regularly interact with our legislators to receive referrals and advise them on trending needs of their constituency. We collaborate with local government efforts through our task force work that sometimes leads to collaborative projects under locally obtained funding, i.e., a "Cities Rise" project during this time period involving several partners under a local grant.

SOURCES OF FUNDING

Legal Services of the Hudson Valley received **\$25,519,398** in total funding this past year



IOLA Grant	\$2,200,000
City and County Funding	\$4,219,039
Foundation	\$1,254,852
Federal	\$8,297,046
Fundraising	\$579,127
State Funding	\$8,854,847
Other	\$114,487
Total	\$25,519,398