



**New York State
Legal Services Initiative**

Report of Findings Seven Statewide Surveys

*New York State
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*New York State Office for the Aging
Corinda Crossdale, Director*

*New York State Office of Court Administration
A. Gail Prudenti, Chief Administrative Judge*

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Glenn Lau-Kee, President*

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Developmental Disabilities
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**Office for
the Aging**



**New York State
Legal Services Initiative**

Members of the *Legal Services Initiative* Think Group:

We are very pleased to provide this document, *Report of Findings: Seven Statewide Surveys*, which describes the results of an extensive exploratory study conducted under the auspices of the *Legal Services Initiative's* partnership. This study gathered descriptive information about the provision of legal services for New York's older adults, people of all ages with disabilities, and the informal, unpaid family members and friends who provide the majority of care for these individuals.

The *Legal Services Initiative* is a statewide effort to improve access to sufficient, available, and affordable legal assistance by the three population groups. Such access has a major impact on the quality of life of these residents and, consequently, on the overall well-being of their communities. As quality of life and community well-being are essential features reflecting a community's level of livability, the *Legal Services Initiative* is carried out as an element of the State's *Livable New York* campaign (<http://www.aging.ny.gov/LivableNY/Index.cfm>).

We wish to thank all of you for your strong interest in the *Initiative* and for your commitment, as members of the *Initiative's* Think Group, to dedicate your time and valued expertise to advancing the ultimate goal of this undertaking—ensuring equitable and effective access to justice for the three population groups that are the focus of this effort.

These results in this *Report*, together with your own extensive expertise and experiences, will form the basis for your work on the Think Group in: (1) raising awareness of the limitations and gaps in legal assistance for the three population groups, and (2) recommending creative steps, actions, strategies, and policies that can effectively address these gaps and limitations.

New York is experiencing significant demographic, social, and public policy changes that have resulted in its residents facing challenges that are increasing in number, type, and complexity. The need for adequate, fair, and effective legal assistance is growing in tandem with these changes. We look forward to collaborating with you as we move forward together to improve the ability of our residents to address the challenges they face.

Sincerely,

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Legal Services Initiative**

Report of Findings

Seven Statewide Surveys

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**New York State
Legal Services Initiative**

Report of Findings

Seven Statewide Surveys

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Report of Findings

Part 1

Seven Statewide Surveys

Section I Introduction

Legal Services Initiative:

Initiative's partnership: Governor Andrew Cuomo announced the New York State *Legal Services Initiative* in September, 2012. The *Initiative* is a public/private effort implemented by a partnership comprising the New York State Office for the Aging, New York State Office of Court Administration, New York State Bar Association, and New York State Office for People With Developmental Disabilities, with facilitation assistance by Robert Abrams, Esq., a private attorney with Abrams Fensterman, LLP.

Initiative's start: The impetus for the *Initiative* stems from the increasing anecdotal reports received from service providers, members of the legal field, members of the Judiciary, and consumers about the status of legal services for three of the State's population groups—older adults (aged 60 and older), people of all ages with all types of disabilities, and the informal, unpaid caregivers of both these populations. The *Initiative* focuses on civil matters and does not address legal assistance for criminal matters.

These anecdotal reports center on:

- Insufficient *availability* of legal assistance.
- Insufficient supply of *affordable* legal assistance.
- Lack of *access* even when legal assistance is available and affordable.
- Lack of awareness by consumers and service providers of the legal rights of individuals for the diversity of problems and issues they encounter in their daily lives.
- Insufficient awareness by members of the legal and Judicial fields of the diverse and distinguishing characteristics of the three population groups, which has an impact on effective communication between these populations as clients and the individuals providing them with legal assistance, as well as an impact on the success of the outcome of the assistance provided.
- Insufficient awareness by members of the legal field and by law schools of the State's changing demographic profile and its shifting public policies around housing, health care, and long-term services and supports, which has an impact on the numbers, types, and complexity of issues faced by these population groups and, consequently, an impact on the demand for legal services and on the need for a shift in how the legal community is trained and prepared to serve these groups.
- Insufficient awareness by members of the legal field and by law schools of the great variety of issues commonly encountered by the three population groups in their daily lives, which has a major impact on the conventional definition of what constitutes "elder law" and "disability law."
- Growing numbers of individuals who enter the court systems without the benefit of legal counsel, which has an impact on the outcomes of cases, equitable access to justice, and the

quality of life of the individuals involved— affecting their economic, familial, social, physical, and mental health conditions.

Initiative's activities: Under the partnership's auspices, the following activities are being carried out to advance the *Initiative's* goals:

- As a means of systematically gathering descriptive data, a series of seven statewide exploratory surveys was conducted to:
 - Better understand the current status of legal assistance for the three population groups;
 - Identify the limitations and gaps in the availability, affordability, and accessibility of legal services for these groups; and
 - Compare the study's findings with the anecdotal reports received.

The seven statewide studies surveyed:

- New York State residents aged 18 and over
 - Attorneys practicing in New York State
 - Area Agency on Aging Directors, regarding the statewide Legal Assistance Program
 - Legal services Providers for the statewide aging network's Legal Assistance Program
 - Attorneys staffing the New York State Mental Hygiene Legal Service
 - Judges and justices in New York State's Unified Court System
 - New York State residents of all ages with disabilities of all types
- A Think Group comprising 105 individuals from across the State with varied expertise, experience, and backgrounds was convened to carry out two major activities:
 - Members developed a *Think Group Report* of suggested actions, steps, policies, and strategies that can address limitations and gaps in legal assistance for the *Initiative's* population groups. The Think Group's work relied upon: (1) the findings from the *Initiative's* statewide surveys, and (2) Think Group members' professional expertise and experiences, which will serve to more fully illustrate, explain, and clarify the surveys' results. The Think Group's suggestions are organized into a *Think Group Report—Strategies for Action: Advancing the Legal Services Initiative's Goals*, which is posted on the *Legal Services Initiative's* web site.
 - Based on the statewide surveys and the Think Group's *Report*, various activities and projects will be developed and implemented to advance the *Initiative's* goals.

Initiative's objectives & goals:

- **Objectives:** The *Initiative's* specific objectives will be informed by the results of the statewide surveys and the Think Group's work and will be realized through various activities, actions, and strategies.
- **Goals:** All activities, actions, and strategies implemented under the auspices of the *Legal Services Initiative's* partnership will be designed to achieve the *Initiative's* goals:
 - Better ensure that New York's older adults, people of all ages with disabilities, and caregivers of these two groups have practical access to sufficient available and affordable legal assistance.
 - Better ensure that the three population groups have the benefit of equitable and effective access to justice.

The Initiative—an activity under New York State's Livable New York initiative:

The *Legal Services Initiative* is one aspect of the State's *Livable New York* initiative. A community's level of livability reflects the quality of life and well-being of its residents. As adequate access to sufficient and affordable legal services has a significant impact on residents' quality of life and overall community well-being, such access is a necessary element of a livable community.

Section II

Key Findings—Seven Surveys

Parts 2 – 8 of this *Report* provide detailed analysis of the *Initiative's* seven surveys, all of which were conducted under the auspices of the *Legal Services Initiative* partnership. This Section II of Part 1 includes key findings taken from the seven surveys' detailed analyses.

STATEWIDE SURVEY OF RESIDENTS AGED 18 AND OLDER

Key Findings

- The *Statewide Survey of Residents Aged 18 and Older* is a telephone survey of 1,002 New York State residents, which was implemented by the Siena College Research Institute, Loudonville, NY. The margin of error for the sample of 1,002 is +/- 3.1 percentage points with a 95% confidence level.
- The *Survey* gathers data on the need and use of legal assistance by New Yorkers aged 18 and over.
- The survey sample includes:
 - 130 individuals aged 18-24;
 - 575 individuals aged 25-59;
 - 239 individuals aged 60 and older; and
 - 58 individuals who would not provide their age.
 - For the 239 respondents aged 60 and older and 305 respondents who identified themselves as "caregivers": the proportion of each of these groups in the sample reflects the U. S. Census Bureau's population demographics for New York State.
 - For 76 respondents who reported "requiring on-going assistance with activities of daily living": the proportion of this group in the survey sample reflects the U. S. Census Bureau's measure of the proportion of New Yorkers meeting this definition of "disability."
- The 1,002 respondents represent rural, suburban, and urban areas and cover all ten geographic regions of the State, as these regions are defined by the State's Regional Economic Council.

Serious issues/problems reported by respondents:

Residents face many, varied types of *serious* issues/problems in their daily lives. An extensive list of these types was organized into five "issue categories," which formed the basis for the survey's questions:

- Housing
- Family Interactions
- Money
- Life Planning
- Dealing with Others.

Many issues/problems reported could have logically been assigned to more than one issue category. However, respondents' answers were not categorized by the survey fielders; instead, categorization was the choice of the respondent reporting the problem, based on that person's own perception of the problem's meaning and burden. The outcome of respondents' categorization increases the awareness needed among the legal community regarding differences that may exist between the "client" and the "attorney" in *how* a problem is perceived and, thus, how the impact of that problem is being *felt* and *understood* by the client.

- **Prevalence:**
 - For 1,002 respondents:
 - 49% (491 respondents) reported having no issues serious enough to be of great concern or to warrant more than ordinary action.
 - 51% (511) of respondents reported facing one or more problems (over the past three to five years, in one or more of the five issue categories) that were serious enough that they wanted or needed assistance to help them resolve the issue (for a total of 1,016 issues across all five issue categories). This proportion, when generalized to the entire State, translates to a substantial number of New York's residents and provides an indication of the potential market for legal information, advice, counseling, or services.
 - Serious problems by age group: Of the 1,002 survey respondents, 944 provided their age, and 58 did not. Of the 944, 492 reported experiencing one or more serious problems. Proportion, by age group:
 - Ages 18-24 (n=130): 45% (or, 59) reported having one or more serious problems;
 - Ages 25-59 (n=575): 57% (or, 327) reported having one or more serious problems;
 - Ages 60 and older (n=239): 44% (or, 106) reported having one or more serious problems.
- **Diversity of type:** The types of problems reported by residents are not congregated in any one or two of the five issue categories, but are spread across all five issue areas—highlighting the diversity of issues affecting residents of all ages, all abilities, and all situations. This diversity was consistent across all respondent characteristics, including age, disabilities, caregiving, geographic location, race, gender, income, marital status, living arrangement, housing tenure, education, and health.
- Among the 59 respondents aged 18-24 who reported having serious problems in one or more categories, the greatest proportion (27%) reported problems related to Family Interactions, and the least proportion (3%) reported problems related to Life Planning.
- Among the 327 respondents aged 25-59 who reported having serious problems in one or more categories, the greatest proportion (31%) reported problems related to Family Interactions, and the least proportion (17%) reported problems related to Housing.
- Among the 106 older adult respondents who reported having serious problems in one or more categories, the greatest proportions reported problems related to Life Planning (23%) and Family Interactions (22%), and the least proportion (11%) reported problems related to Housing.
- Compared to other race/ethnic groups, greater proportions of Black Non-Hispanic respondents reported serious problems related to Family Interactions (35%), Money (34%), Housing (26%), and Dealing with Others (21%).
- A greater proportion of White Non-Hispanic respondents reported serious issues in the issue area of Life Planning (24%), compared to the other population groups.
- Renters are more likely than owners to report serious issues in Housing (20% vs. 12%), Family Interactions (30% vs. 25%), and Money (26% vs. 21%).
- Owners (26%) are much more likely than renters (13%) to report serious issues in Life Planning.

In total, across all five issue categories:

- A greater proportion of younger-aged residents with disabilities reported serious issues than did older adults with disabilities.

- Both respondents with disabilities and respondents who are caregivers report more serious issues than respondents who are neither caregivers nor people with disabilities.
- Among the ten geographic regions of the State, Hudson Valley respondents reported the greatest average proportion (26%) of issues.
- Among household income groups, respondents in the \$0-\$12,000 (19%) and \$50,001-\$75,000 (19%) income groups reported the *smallest* average proportion of issues.
- Among household income groups, respondents in the \$75,001 and Over group (25%) and those in the \$30,001-\$50,000 income group (24%) reported the *largest* average proportion of issues.
- Gender is not a factor in explaining numbers and types of serious issues reported by respondents. The proportion of respondents reporting serious issues is essentially the same for males and females across all five issue categories.
- Among marital groups, respondents in the "civil and domestic partnership or long-term relationship" group reported the largest average proportion (27%) of issues.
- Greater proportions of older respondents who are "living with other adults" reported serious problems than did older respondents who are "living alone."
- Conversely, greater proportions of younger respondents who are "living alone" reported serious problems than did younger respondents who are "living with other adults."
- A smaller average proportion (17%) of respondents with "a high school degree or less" reported problems, compared to those with "professional certificates or some college" (28%) and those with "four or more years of college" (22%).

Use of legal assistance:

For problems reported in each issue category, respondents were asked if they used any type of legal assistance to address those problems.

- Respondents used legal assistance for 50% (510) of the 1,016 serious issues reported.
- Respondents' use of legal assistance is not congregated in one or two issue areas, but is spread across all five categories. Respondents used legal assistance for:
 - 52% of Housing-related problems.
 - 59% of issues related to Family Interactions.
 - 36% of Money issues.
 - 64% of issues related to Life Planning.
 - 40% of issues related to Dealing with Others.

Key differences in use of legal assistance (across five issue areas):

- **Age:** Older respondents used legal assistance for a greater proportion of their reported problems than did younger respondents.
- **Upstate/downstate:** Long Island respondents used legal assistance for a greater proportion (57%) of their reported problems than did New York City (48% of problems) and Rest of State (50% of problems) respondents.
- **Transportation:** A major element of "access" to community-based programs and services (including legal services) is transportation. Respondents *with* access to affordable transportation used legal assistance for a greater proportion (52%) of their problems than did respondents *without* access to transportation (35%).

- **Income:** Respondents in the lowest income group used legal assistance for a smaller proportion of their problems than did respondents in the five higher income groups.
- **Race/ethnicity:** Hispanic/Latino respondents used legal assistance for a greater proportion of their problems than did all other minority respondents, and used legal assistance for a somewhat greater proportion of problems than did White non-Hispanic respondents.
- **Gender:** Female respondents used legal assistance for a greater proportion of reported problems than did male respondents.
- **Marital status:** Never Married respondents used legal assistance for a smaller proportion of their problems than did respondents in the three other marital-status groups.
- **Health:** Respondents with self-reported *poor* or *good/very good* health used legal assistance for a greater proportion of their problems than did respondents reporting *fair* health.
- **Owner/renter:** Owner respondents used legal assistance for a larger proportion of their problems than did renter respondents or respondents living in other situations.
- **Education:** The proportion of problems for which legal assistance was used increased (from 39% - 54%) as respondents' level of education increased.

Type of legal assistance used:

- An attorney (sole practitioner or law firm) was the type of legal assistance used for the greatest proportion (67%) of the 510 problems for which legal assistance was used.
- An attorney or law firm was used *most often* by:
 - Respondents in the \$50,001 and Over income group (78% of their reported problems).
 - Respondents aged Age 60 and Older (77% of their reported problems).
 - White non-Hispanic respondents (76% of their problems).
- An attorney or law firm was used *least often* by:
 - Respondents in the \$0 - \$30,000 income group (39% of their reported problems).
 - Black non-Hispanic respondents (44% of their problems).
 - Respondents with Disabilities (52% of their problems).
- Free services offered by various agencies or programs were used for a small proportion (average of 6%) of problems.
- Organizations providing free legal services were used *most often* by:
 - Hispanic respondents (16% of their reported problems).
 - Respondents in the \$0 - \$30,000 income group (13% of reported problems).
 - Black non-Hispanic respondents (11% of problems).
- Organizations providing free legal services were used *least often* by:
 - White non-Hispanic respondents (3% of their reported problems).
 - Respondents aged 60 and Older (3% of their problems).
 - Suburban respondents (3% of their problems).

Satisfaction with legal assistance used: Respondents reported using legal assistance for 510 problems, and reported their level of satisfaction for 503 of those problems.

- Across all five issue areas, satisfaction with legal assistance used was:
 - "Very helpful": for 65% of problems.
 - "Somewhat helpful," "not very helpful," or "not helpful at all": for 35% of problems.

Reasons for dissatisfaction with legal assistance used: Respondents who used legal assistance provided 87 reasons for their dissatisfaction (across the five issue areas).

- The reasons for dissatisfaction reported most often were:
 - “The provider of assistance was incompetent” (28% of reasons).
 - “The provider did not seem to really have my best interests in mind” (23%).
 - "The help provided was not worth the cost" (18% of reasons).

Respondents' reasons for NOT using legal assistance: Respondents reported a total of 1,016 serious problems across the five issue areas, and they did NOT use legal assistance for 506 (50%) of them.

- Respondents provided 772 reasons for not using legal assistance. The three reasons given most often were:
 - “Respondents thought they or their family could handle the problem themselves” (37% of all reasons).
 - "Respondents didn't think the problem was a legal issue" accounted for 22% of all reasons.
 - "Respondents didn't think they could afford legal help" accounted for 17% of all reasons.

Respondents' "one most serious issue":

Across the survey's five issue areas, 511 respondents reported a total of 1,016 problems. Those 511 respondents were asked to choose the "one most serious" of their reported problems and to describe this one problem in a few words.

- The 511 "one most serious" problems were organized into ten categories. Distribution of the 511 problems:
 - 86 issues: Family Interactions/Dynamics
 - 83 issues: Financial/Money Matters
 - 76 issues: Housing/Property Matters
 - 65 issues: Life Planning, Retirement Planning, & Estate Issues
 - 39 issues: Scams, Fraud, and Negligence
 - 32 issues: Health—Self, Immediate Family, & Other Relatives
 - 31 issues: Long-Term Care
 - 20 issues: Discrimination and Inappropriate Treatment
 - 10 issues: Disabilities
 - 69: Would not or could not provide a specific description

Respondent's appearance in court or administrative hearing:

The 511 respondents who described their “one most serious problem” were asked if they went to court or an administrative hearing for the problem they described.

- 23% (or 118) of the 511 *appeared* in court or an administrative hearing, most often for issues related to Family Interactions (43% of the 118)) and Housing/Property Matters (25% of the 118).

Legal representation in court or hearing:

- Of the 118 respondents who went to court or an administrative hearing:
 - A majority (60%, or 71) appeared *with* legal counsel.
 - 39% (or 46) appeared *without* the benefit of legal counsel.
- Respondents appeared in court or an administrative hearing *without* legal representation most often for issues related to:
 - Financial/Money Matters (53% appeared without legal counsel; 47% appeared with counsel).
 - Housing/Property Matters (52% appeared without legal counsel; 48% appeared with counsel).

Did respondents understand court or hearing room procedures and steps:

- Of the 118 respondents who went to court or to an administrative hearing:
 - 22% understood the steps and procedures only "somewhat," "not enough to be comfortable," or "not at all."

Did respondents understand their case discussion and Judge's decision:

- Of the 118 respondents who went to court or to an administrative hearing:
 - 23% understood the case discussion and judge's decision only "somewhat," "not enough to be comfortable," or "not at all."

**STATEWIDE SURVEY OF ATTORNEYS PRACTICING IN NY STATE
Key Findings**

This survey was implemented by the New York State Office for the Aging. There are approximately 155,000 attorneys in good standing practicing in New York State, and a stratified (by county) random sample of 1,834 attorneys was chosen for the study. Each was individually requested by email to complete the survey questionnaire, which was posted on-line, and each was sent three reminders. 266 completed surveys were received. The margin of error for a sample of 266 is +/- 6.0 percentage points with a 95% confidence level.

Key findings from this exploratory survey of practicing attorneys include:

Respondent—characteristics:

- The survey's 266 respondents range in age from 27 – 79, with the largest number (15 respondents) being age 52.
- 31% of respondents were in practice for 20 – 29 years, and 44% were in legal practice between 1 and 19 years. Four reported being in practice for 50 – 53 years.
- Several respondent characteristics closely match national or state statistics, supporting representativeness of the survey's findings:
 - 35% of respondents are female, which closely matches the American Bar Association's 2012 annual survey (33% female).
 - 7% of respondents report having a disability, which matches the American Bar Association's 2011 report of its members—6.87% have a disability.
 - 26% of respondents reported being an informal, unpaid caregiver for six months or more during the previous five years, which is close to the proportion of caregivers (30%) reported by the *Initiative's* survey of the State's general population aged 18 and over.
 - The majority of respondents (89%) are White Non-Hispanic, which matches the Census Bureau's 2010 national data (88%) regarding practicing lawyers.
 - There are different definitions of which employment venues can be considered "private practice." 76% of survey respondents reported their legal service employment site as one of six venues that can be categorized as "private practice." For the venues listed in the survey, the American Bar Association's 2005 data report that 85% of lawyers are in private practice.
 - The diversity among the survey's respondents is underscored by the variety of practice areas or specialties reported by 253 respondents (Appendix A). Sufficient variety existed to preclude reasonable categorization.

- **Employment venue:**
 - 41% of respondents work in law firms, and 21% of respondents are sole practitioners.
 - 20% of survey respondents work in government settings, which is much larger than the American Bar Association's data (8%) in 2005.

- **Location:** 67% of respondents' law offices are located in urban areas. 27% are in suburban areas, and 6% are located in rural areas of the State.

- **Service area:**
 - The service areas of 49 respondents cover "all counties" of the State.
 - 210 respondents list one or several counties as their service area.
 - Among all respondents, all 10 regions of the State are covered.
 - 48% of respondents cover the NY City region, with 52% covering the rest of the State.

- **Work time:**
 - Respondents work between 1 and 100 hours per week, with an average work week of 45 hours. 19% averaged less than a full-time work week.
 - The top three tasks respondents perform for older adult clients, clients of all ages with disabilities, and clients with caregiver issues are:
 - Legal counseling and advice (25%: median proportion of respondent's work time).
 - Drafting and executing legal documents (20%: median proportion of work time).
 - Representing clients in court or administrative hearings (20%: median proportion of work time).

- **Where services are delivered:**
 - 95% of respondents deliver client services in their law office.
 - 45% also meet with clients in the client's office or other places such as a restaurant, golf course, club, etc.
 - 25% also meet with clients in the client's home, residence, health care facility, or hospital.

- **Billing:**
 - 105 respondents are salaried employees and, thus, do not charge fees to clients.
 - Of the 161 respondents who bill clients directly, most use a variety of billing methods, including a regular billable rate, discounted rate, contingency fee, alternative fee arrangement, or no fee.
 - Pro Bono:
 - 59% of the 161 respondents serve between 1% - 100% of their case load on a pro bono basis, including:
 - 24% serve 5% of their cases on a pro bono basis.
 - 14% serve 10% of their cases on a pro bono basis.
 - 3 respondents reported serving between 90% - 100% of their cases on a pro bono basis.

- **Cases:** 169 respondents reported a total case load of between 1 and 800 cases during the 12-month survey period, for an average of 98 cases per respondent.

Clients:

- **Type of client:**
 - The greater proportion (43%) of respondents served both individual and organizational clients.

- 23% served *only* organizational clients (businesses, companies, corporations, agencies, groups, organizations, trade associations, etc.).
- 18% served *only* individual clients.
- **Client age:**
 - Respondents who served individual clients typically served *both* older persons (aged 60 and over) *and* younger persons (aged 0 – 59).
 - 46 respondents reported that 70% - 100% of their total case load was younger clients.
 - 7 respondents reported that 70% – 100% of their case load was older persons.
- **Client disability:** Respondents reported on individual types of disabilities (proportions reported can be duplicated counts as clients with disabilities often have multiple disabilities):
 - 28 respondents reported that 100% of their clients had NO disabilities.
 - 61 reported that between 1% - 85% of their clients had physical disabilities.
 - 41 reported that between 1% - 80% had mental health disabilities.
 - 19 respondents reported that between 1% and 50% had developmental or intellectual disabilities.
 - 73% of respondents reported that all their clients had the ability to speak and understand English, while 27% reported that between 1% - 90% of clients had limited or no English-speaking ability.
- **Issues:** The diversity of issues experienced by older adults, persons with disabilities, and caregivers is highlighted by the top issues these clients present to respondents. See Part 3, Tables 8 – 12, which show:
 - 207 top issues presented by clients aged 60 and over, which are sorted into 13 categories.
 - 120 top issues presented by clients with physical disabilities, which are sorted into 12 categories.
 - 100 top issues presented by clients with mental health disabilities, which are sorted into 10 categories.
 - 77 top issues presented by clients with developmental or intellectual disabilities, which are sorted into nine categories.
 - 56 top issues brought by clients presenting issues related to their caregiver responsibilities, which are sorted into six categories.

Professional consultation:

- Over their entire legal career, between 25% - 35% of respondents consulted "No Times" with experts regarding older adult clients or clients with various disabilities; 54% consulted No Times regarding caregiving.
- Between 13% - 21% consulted "Very Often" regarding older adults or clients with disabilities; 10% consulted Very Often regarding caregiving.

Training in law school:

- During law school, between 83% - 91% of respondents received "No" training (classroom courses, clinics, internships, externships, field placements, research projects, etc.) regarding aging, older adults, people with disabilities, or living with a disability. 97% received No training regarding caregiving.
- Between 0% and 1% received training "More Than 4 Times" regarding disabilities and caregiving; 2% received training More Than 4 Times regarding aging.
- Professional development—conferences, workshops, classes, read professional articles or books, done research, etc.:

- Over their entire legal career, between 54% - 67% of respondents engaged in "No" professional development activities related to older adults or persons with various disabilities. 81% engaged in NO professional development activities regarding caregiving.
- Between 13% - 32% engaged in such activities 1 – 4 times for the three population groups.
- Between 3% - 11% engaged in such activities 5 – 10 times.
- Between 3% - 8% engaged in such activities more than 10 times.

**Statewide Survey of Area Agency on Aging Directors,
Regarding the Legal Assistance Program
Key Findings**

This survey was implemented by the New York State Office for the Aging, using a survey questionnaire posted on-line for completion by the Directors of New York State's 59 Area Agencies on Aging (AAA).

All 59 AAA Directors submitted completed questionnaires, for a 100% response rate, making survey results representative of the State's entire network of Legal Assistance Programs.

Key findings from this study include:

- The diversity among the 59 Legal Assistance Programs across the State is illustrated by findings related to Program size (amount of staff and funding), number of clients, cost per unit of legal service, type of contracted Provider, type of legal services provided, and approaches to Program implementation.

Funding:

- The Legal Assistance Program's primary sources of funding are Title III-B of the federal Older Americans Act and county government funding.
 - All 59 AAAs used Title III-B funds for the Program, with Program allocations across the 59 AAAs ranging from \$573 - \$660,895.
 - 26 (46%) AAAs used county government funds for the Program, with Program allocations ranging from \$406 - \$1.45M.
 - Across 14 Programs, a total of \$137,581 in supplemental funding from a variety of sources was allocated to the Program (including NY State Community Services for the Elderly Program, Older Americans Act Title III-E funds, donations, attorney-matched resources, and others).
- The Program's statewide *total* funding for the 12-month survey period (Title III-B, county government, and supplemental funding) was \$4.47M, with individual total Program budgets among the 59 AAAs ranging from \$2,387 - \$2.1M. Across the 59 AAAs, median total Program funding was \$13,556.
- 46 respondents reported the units (one unit = one hour) of legal services provided: the average amount of Program funds spent per unit of service is \$35.

- Exhaustion of Program funds:
 - 42% of AAAs reported that the Program's Title III-B funds were exhausted before the end of the Program year.
 - For the 26 AAAs allocating county government funds to the Program, 35% (or, 9 AAAs) reported that the county government funds allocated to the Program were exhausted prior to the end of the Program year.
 - For the 14 AAAs using supplemental funds, all reported that these funds were exhausted prior to the end of the Program year.

Providers:

- 27 (46%) AAAs use only the contracted Provider to implement the Program, while 32 (54%) use the contracted Provider and other staffing resources. For the 32, "other" resources are primarily the AAA's paid staff, while 7 reported using pro bono attorneys, pro bono paralegals and volunteers.
- 38 AAAs use a "sole source" procurement process for selecting Providers, and 24 use a competitive procurement process. 9 AAAs rely upon a long-term contractual relationship to continue contractual arrangements.
- 35 (59%) AAAs report using an "hourly rate" reimbursement method for Providers. Hourly rates range from \$25 - \$215 (median rate: \$60). The highest hourly rates are paid in the Hudson Valley Region (median: \$100) and the Finger Lakes Region (median: \$70). The lowest hourly rates are paid in the North Country (median: \$37.50) and in the Metropolitan New York Region (\$39).

Clients:

- 53 respondents reported serving a total of 8,341 clients in the Program during the survey period. The 2010 U. S. Census reports 2.3M persons aged 60 and older for these 53 counties; thus, total clients served equals .4% of the older adult population in these counties. As a comparison, the *Legal Services Initiative's* Survey of New York's Residents Aged 18 and Older (Part 2) showed that, over a five-year period, 44% of residents aged 60 and older experienced issues serious enough to want or need legal assistance.
- The diversity of issues confronting older adults is evident in the list of 42 issue areas reported by respondents as being among the top five presented by callers requesting assistance from the Legal Assistance Program (see Part 4, Table 14).
- 59% (35) of respondents reported that, for a variety of 13 listed reasons, they could not or did not serve some requests for legal assistance. The reason cited most often (32 AAAs) was that "the issue presented did not fall within the AAA's priorities for the Legal Assistance Program." The reason cited second most often (16 AAAs) was that "the cost to address the request was too great relative to the AAA's total Program resources." Among the 13 listed reasons, 8 were related to limited Program resources.
- Transportation and personal mobility are two major aspects affecting access to legal assistance. 44 (75%) AAAs reported that their Providers traveled to where clients live in order to deliver legal assistance—including the client's home, a family member's home, senior residence, assisted living or other long-term care facility, nursing home, or hospital.

Representation in court or hearings: Client-representation in court proceedings or administrative hearings uses significant Program resources, which has an impact on the number of clients that can be served, as well as the extent to which older adults enter the court system without the benefit of legal counsel.

- 42% (25) of AAAs reported that their contracts do *not* allow the Provider to provide client-representation. Of the 34 that *do* allow client-representation, 22 reported that the proportion of Providers' Program resources devoted to this service ranged from 0% - 54% (median proportion of Program resources: 7.5%).

Survey of Legal Services Providers for the Aging Network's Statewide Legal Assistance Program Key Findings

Across the State, a total of 51 Provider offices and organizations are under contract with New York's 59 Area Agencies on Aging (AAA) to deliver legal services to older adults under the federally mandated Legal Assistance Program.

The survey of Providers was implemented by the New York State Office for the Aging, using a questionnaire that was emailed to the 51 Providers for completion and submission electronically. 37 Providers submitted completed Questionnaires, for a response rate of 73%. As various Providers have contracts with multiple AAAs, the 37 respondents involve 57 separate service contracts with 50 different AAAs—representing service areas of 85% of the State's 59 AAAs. The margin of error for the sample of 37 is +/- 8.5 percentage points with a 95% confidence level.

Following are 16 key findings taken from the survey's data analysis.

- Survey findings show that diversity characterizes both the Legal Assistance Program and the Program's network of Providers—including type of contracted Provider, area(s) of Provider legal expertise, program funding, Provider's staff resources and work hours allocated to the Program, number of cases and clients served, and aspects of Program implementation.
- Among five Provider "types" under contract with AAAs to deliver the Program's services, 35% are sole practitioner attorneys and 30% are Legal Aid Society agencies. Variety in the type of Provider used by AAAs characterizes the Program across all areas of the State.
- 29% of respondent Providers are grantees of the national Legal Services Corporation, the single largest funder of civil legal aid for low-income individuals in the nation.
- The various surveys conducted for the *Legal Services Initiative* consistently show the variety of issues faced by residents of all ages, abilities, and economic circumstances. For the survey's 37 Provider respondents, between 16 and 26 respondents reported having legal expertise in topics related to elder law and estate law; 22 have experience in health issues; 19 have expertise in various issues related to debt; and 18 have experience related to various public benefits. A range of 2 – 16 respondents have experience in 14 additional topic areas.
- The Legal Assistance Program's size is evident in Provider staffing. For 28 Program contracts, Providers use less than 1 full-time (FTE) person to carry out the contracted Program responsibilities; 7 contracts devote 1 FTE to the Program; 11 use 1¼ – 3 FTEs; 6 use 4 – 5½ FTEs; and 3 use 7 – 10 FTEs. Across all 55 contracts, the median FTE paid staff allocated to a Program is .6.
- The diversity among Programs is clear from the reported total hours-per-month devoted to the Program by the Provider's paid staff, which ranges from 5.5 hours per month to 825 hours per month. The median total hours per month per contract is 25.

- 46% of respondents use unpaid, volunteer, or pro bono individuals to help carry out the Program; 54% do not.
- 17 tasks/activities required to carry out the Program are listed in the survey Questionnaire. Among 57 contracts, respondents reported that there is not an absolute delineation between which entity (AAA or Provider) performs the required tasks. Instead, respondents reported considerable sharing of tasks and responsibilities, indicating that collaboration and working together exists in the implementation of the Legal Assistance Program.
- Representing clients in court or administrative hearings is a resource-intensive activity, and limited Program resources often preclude Providers from offering this specific service. For 22 Program contracts, respondent Providers allocate NO time to client-representation; respondents for 33 contracts DO allocate time to client-representation, but the average proportion (9%) of contract time devoted to this activity is small.
- For 52 contracts, respondents reported the annual funding received from the AAA to carry out the Program. Median amount: half of the 52 contracts were for less than \$14,078, and half were for more than that amount.
- Respondents for 17 contracts reported receiving supplemental funding for the Program from sources other than the AAA. Median amount: half of the 17 contracts were for less than \$2,300 in supplemental funds, and half were for more than that amount.
- For 52 Program contracts, 58% of respondents reported that their AAA Program funding was exhausted *before* the Program year ended; for the 17 contracts using supplemental funds, respondents reported that 100% of supplemental funding was exhausted prior to the end of the Program year.
- Diversity among Programs is illustrated by the number of cases and clients served. For 51 contracts, the median number of cases per contract is 108, but the number of cases per contract ranges from 6 – 1,602. The median number of unduplicated clients per contract is 78, with a range of 6 – 1,471.
- Sufficient access to legal services is a major goal of the Legal Assistance Program. In addition to providing services in the Provider's office, 46 respondents travel to clients' homes, senior residences, health care facilities, and hospitals to provide legal services; 18 provide services in the AAA's office; 16 provide services in senior service centers; and 10 provide services in other community venues. 42 provide an average of 27% of their Program assistance by telephone or other communication that is not in-person.
- For 56 Program contracts, 93% of respondents rated their working relationship with the AAA as "satisfactory," with the primary elements contributing to a satisfactory relationship being "quality of communication and contact between the AAA and Provider," the "quality of both the Provider's and the AAA's staff," and the "helpfulness of the AAA's staff."

***Statewide Survey of Attorneys
Staffing the New York State Mental Hygiene Legal Service
Key Findings***

This survey was developed by the New York State Office for the Aging and the four Directors of the New York State Mental Hygiene Legal Service (MHLS). It was implemented by the MHLS Directors, and all 170 attorneys staffing the MHLS program were directly contacted by the Directors and requested to complete the survey, which was posted on-line. 79 completed

survey forms were received. The margin of error for the sample of 79 is +/- 8.09 with a 95% confidence level.

Key findings from the survey include:

- Among the 79 respondents:
 - 60% are women
 - 84% are White Non-Hispanic
 - 98% do not have a disability that compromises activities of daily living
- The four MHLS Directors provided the following information:
 - The program's 170 attorneys handled a total of 173,775 cases during the survey's 12-month period, for an average of 1,022 cases per attorney.
 - Total statewide funding for the MHLS program for the 12-month survey period was \$29.5M; average program funds per client-case was \$170.
- Carrying out the MHLS program involves a variety of tasks. Among those tasks, the 79 respondents, on average, spend 18% of their total work time on client-representation in non-appellate or appellate proceedings.
- The largest proportion (72%) of MHLS clients are aged 18-59; 23% are aged 60 and older; 8% are aged 0-17.
- In categorizing clients by six types of disabilities, the largest proportion of MHLS clients are persons with *primarily* mental health disabilities (median proportion of clients=64%). However, 47 of the respondents reported that, on average, 63% of their clients had multiple disabilities.
- MHLS clients come from a variety of living environments, including psychiatric hospitals, residential facilities certified/licensed by various State agencies, correctional facilities, conventional community housing, as well as homeless individuals in shelters and on the streets.
- Comparatively, a greater proportion of respondents report that, over their MHLS tenure:
 - Older adult clients, clients with dementia, clients with mental health disabilities, and clients with developmental or intellectual disabilities have "increased somewhat";
 - Clients involved with the Criminal Justice System have "increased significantly" (providing assistance to this clientele is a recent MHLS mandate);
 - An equal proportion of respondents report that the number of caregiver clients has "stayed the same" or has "increased somewhat"; however, a greater proportion report that they "do not know" the trend in caregiver clients.
- 64% of respondents report that "some" of their clients have communication problems that are due to their disabilities, and 27% report that "many" of their clients have limited communication skills because of their disabilities. 67% of respondents report that some of their clients have limitations because of English-language deficiencies.
- When serving clients who have limitations in their ability to communicate effectively, 62% of the resources MHLS attorneys use to address these limitations are "formal or official interpreter and translator services"; however, 38% use informal resources such as office colleagues, medical and health facility staff, social workers, client's family members or friends, ministers, other clients or patients, picture illustrations, etc.
- Major issues presented by MHLS clients center on:
 - Issues related to release/discharge from the psychiatric hospital or other institutional facility; objections to involuntary placement and retention, and objections to mandated medications, treatments, and medical procedures.

- Issues related to community-based housing, services, and treatment.
- “Access problems” are the primary reason why people who are eligible for MHLS services do not use the program, including their lack of knowledge about the program’s existence and their unawareness of their entitlement to the program’s services.
- The two primary areas of training respondents would like are:
 - Improved skills in a variety of areas related to “courtroom procedures”;
 - Better understanding of numerous discrete topics, which are specified in Part 6, Table 16.

***Statewide Survey of Judges and Justices
in the New York State Unified Court System
Key Findings***

This survey was developed by the New York State Office for the Aging and the New York State Office of Court Administration (OCA) and was implemented statewide by OCA.

There are approximately 800 judges and justices in the Unified Court System, and 461 submitted completed surveys (235 from the five counties of New York City and 226 from the 57 counties outside of New York City). The margin of error for the sample of 461 is +/- 2.97 percentage points with a 95% confidence level.

A large number of the survey's questions require qualitative answers, and a number of respondents did not answer many of these; it is not known if the non-responses are because the questions are not relevant to those respondents' positions in the Court System or if these respondents simply chose not to answer these questions because of the time involved in completing qualitative items. For these questions, caution must be exercised in judging representativeness of the findings.

Following are key findings taken from the detailed analysis of this survey:

- Trends in the number of types of litigants during respondents' total tenure in the Court System: respondents generally feel that the number of older adult litigants and those with physical, mental, developmental, and intellectual disabilities has stayed the same; the greater portion of respondents "do not know" if the number of caregiver litigants has changed over their tenure.
- Type of litigants—average proportion of respondent's total civil proceedings:
 - Older adults: average of 16% of respondent's total cases.
 - Litigants with disabilities: average of 10% of total cases.
 - Caregiver litigants: average of 6% of total cases.
 - Litigants with limited or no English-speaking ability: average of 16% of respondent's total cases.
 - Race/ethnicity:
 - For NY City respondents, an average of 32% of respondent's cases are White Non-Hispanic, and an average of 68% of cases involve litigants who are members of a minority racial/ethnic group.
 - For Rest of State respondents, an average of 66% of respondent's cases are White Non-Hispanic, and an average of 34% of cases involve litigants who are members of a minority racial/ethnic group.

- 223 NY City respondents and 158 Rest of State respondents reported on whether resources available to accommodate individuals with limited or no English-speaking ability are "sufficient" to assist those individuals:
 - NY City: 50% reported that they are not sufficient, and 43% reported that they are sufficient.
 - Rest of State: 33% reported that they are not sufficient, and 62% reported that they are sufficient.
- For six population groups, between 358 – 373 respondents reported on the proportion of their litigants who understand court system procedures, protocols, terminology, and decisions "not very well" or "not well at all":
 - Older adult litigants: 31% understand "not very well" or "not well at all."
 - Litigants with Alzheimer's Disease or other dementia: 45%.
 - Litigants with physical disabilities: 22%.
 - Litigants with mental health disabilities: 60%.
 - Litigants with developmental or intellectual disabilities: 58%.
 - Caregiver litigants: 18%.
- Accessibility for older adults and for people with disabilities:
 - Exterior grounds:
 - NY City respondents: 19% stated that the exterior grounds of the courthouse are "very easy" to navigate/negotiate by older adults and people with disabilities, and a total of 74% feel that they are "somewhat easy," "not very easy," or "not easy at all."
 - Rest of State respondents: 33% stated that the exterior grounds are "very easy" to navigate/negotiate, and a total of 65% feel that they are "somewhat easy," "not very easy," or "not easy at all."
 - Courtroom entrance:
 - NY City respondents: 21% stated that the courtroom's entrance is "very easy" to navigate/negotiate by older adults and people with disabilities, and a total of 72% feel that the entrance is "somewhat easy," "not very easy," or "not easy at all."
 - Rest of State respondents: 34% stated that the courtroom entrance is "very easy" to navigate/negotiate, and a total of 63% feel that the entrance is "somewhat easy," "not very easy," or "not easy at all."
 - Courtroom building's interior:
 - NY City respondents: 18% stated that the courtroom's interior environment is "very easy" to navigate/negotiate by older adults and people with disabilities, and a total of 74% feel that the courtroom's interior is "somewhat easy," "not very easy," or "not easy at all."
 - Rest of State respondents: 36% stated that the courtroom's interior environment is "very easy" to navigate/negotiate, and a total of 61% feel that the interior is "somewhat easy," "not very easy," or "not easy at all."
 - Do-it-yourself forms, Web-based resources, Web-based language translation, interactive documents, self-help centers, and other technology:
 - 6% feel that these resources are "very easy" for Older Adults, and 59% feel they are "somewhat easy," "somewhat difficult," or "very difficult."
 - 9% feel that these resources are "very easy" for Litigants with Physical Limitations, and 47% feel they are "somewhat easy," "somewhat difficult," or "very difficult."
 - 4% feel that these resources are "very easy" for Litigants with Mental Health or Cognitive Limitations, and 51% feel they are "somewhat easy," "somewhat difficult," or "very difficult."
 - Substantial proportions of respondents (35%, 44%, 45%) "do not know" how easy or difficult these resources are for the three population groups.

- Appearing in court pro se: Proportion of respondents who reported that litigants appeared in court without the benefit of legal representation (pro se) "often," "very often," "almost always," or "always":
 - Older adults: 44% of NY City respondents; 28% of Rest of State respondents.
 - Physical disabilities: 35% of NY City respondents; 25% of Rest of State respondents.
 - Mental health disabilities: 33% of NY City respondents; 23% of Rest of State respondents.
 - Developmental or intellectual disabilities: 32% of NY City respondents; 23% of Rest of State respondents.
 - Caregivers: 27% of NY City respondents; 22% of Rest of State respondents.
- The main reason litigants appear in court pro se is related to affordability issues.
- The major impacts of litigants appearing without legal counsel:
 - The quality of the proceeding is affected negatively.
 - The outcome of the proceeding is affected negatively.
 - The litigant's understanding of the proceedings and the implications of the decisions is much less.
- The knowledge level of three Court System groups (Judges, non-Judicial attorneys, and non-Judicial/non-attorney court staff) regarding older adults and the aging process, individuals with physical disabilities, people with mental health issues, people with developmental or intellectual disabilities, and caregivers:
 - Respondents' ratings of the three Court System groups' knowledge level are not congregated in any one rating category, but are distributed across three categories ("very knowledgeable," "fairly knowledgeable," "slightly or not knowledgeable"), as well as "do not know."
 - Larger proportions of respondents rated judges and non-judicial attorneys as "fairly knowledgeable" about older adults, physical disabilities, mental health disabilities, and developmental/intellectual disabilities, but "slightly knowledgeable or not knowledgeable" about caregivers.
 - Non-judicial staff who are not attorneys are mainly rated as "fairly knowledgeable" about older adults and physical disabilities, but are mainly rated as "slightly knowledgeable or not knowledgeable" about mental health disabilities, developmental/intellectual disabilities, and caregivers.

***Statewide Survey of New York State Residents
Who Have One or More Disability, Impairment, or Condition
That Limits Their Ability to Perform
Activities of Daily Living Without Assistance
Key Findings***

This study surveyed New York State residents of all ages who have one or more disability, impairment, or condition that limits their ability to perform activities of daily living with the assistance of other people, devices, or equipment. The survey's Questionnaire was constructed by the NY State Office for the Aging (NYSOFA) and is a slight modification of the instrument used to conduct the *Initiative's* statewide survey of the State's general population aged 18 and over. Under the auspices of the State's *Legal Services Initiative*, the survey was implemented by NYSOFA and a total of 278 survey responses were received, which included 255 on-line and manual submissions received in June – August of 2015, and 23 manual submissions received May – July of 2014.

There is no comprehensive statewide list of New York State residents with disabilities; thus, the population universe for the study could not be identified from which a random-selection methodology could be employed to construct a survey sample. As a means of reaching as broad a cross-section of individuals as possible, a letter explaining the *Legal Services Initiative* and the disabilities survey project was emailed to 860 leaders of public and private organizations across the State whose mission is to serve, advocate for, or develop and administer programs for individuals with disabilities, impairments, or chronic illnesses. The letter asked for these organizations' assistance in reaching out to individuals on their client rosters, membership lists, email list serves, and newsletter subscription lists to request that individuals who have "conditions that limit their ability to conduct activities of daily living without assistance from other individuals, equipment, or devices" complete the survey. Survey respondents self-identified themselves as having such a condition and provided a description of their disability, impairment, or chronic condition in the Questionnaire.

Following are key findings taken from the detailed analysis of this survey:

- The survey includes individuals of all ages who self-identify as having a disability, impairment, or condition lasting six months or more.
- A total of 278 survey responses were received, which include 255 on-line and manual submissions received in June – August of 2015 and 23 manual submissions received May – July of 2014.
- New York State's 62 counties are grouped by ten Regional Economic Development Councils. The survey's 278 respondents are located across all ten regions, coming from 49 counties (79% of the State's 62 counties).
- The survey's respondents are spread across rural (33%), suburban (44%), and urban (21%) areas of the State (2% did not report their residence's geographic area).
- Survey respondents are characterized by an extensive variety of disabilities or conditions; 268 respondents described a total of 366 major disabilities or conditions.
- 26% of respondents did not report their birth year. The ages of the remaining 74% of respondents range from 2 – 101. 62% of those respondents are aged 0 – 59, and 38% are aged 60 and older.
- 23% of respondents did not report their race/ethnicity. Among the 213 respondents who did report, 86% are White Non-Hispanic, suggesting that minority residents are underrepresented in the survey.
- The majority (84%) of respondents reside in a variety of conventional living arrangements in the community, and 16% live in various types of certified homes or licensed facilities.
- Respondents' educational levels range across the academic spectrum, from "less than high school graduate" to "four or more years of college."
- The annual household income of 53% of respondents is below \$30,000, and 47% have incomes of \$30,000 or more, including 12% whose income is \$100,000 or more.
- 28% of respondents report that they provide regular caregiving duties for frail, ill, or impaired family members or friends.
- 38% of respondents report that they have "access to affordable transportation when they need it" only sometimes, almost never, or never.
- Respondents were asked if, over the past three to five years, they had experienced a serious issue (serious enough to desire or require assistance from others) in any of five issue categories: housing/real estate, family matters, money matters, life planning, and dealing with others. 82% (228) report having a serious issue in one or more of the five categories, and 18% (50) report having no serious issues in any of the five categories.

- Among the 228 reporting serious issues, the majority (72%) report serious issues in 2 – 5 categories, and 28% report serious issues in one category—for a total of 593 extremely diverse issues.
- The 593 serious issues reported are spread across all five issue categories: housing (138), money matters (135), family matters (123), life planning (106), and dealing with others (91).
- Respondents were more likely to use the assistance of a lawyer, other legal assistance provider, or community agency for issues related to Family Matters (58% of Family Matter issues) and Life Planning (50% of Life Planning issues), compared to Money Matters (42%), Dealing with Others (33%), and Housing (32%).
- Across issue categories, the three primary reasons respondents give for *not* using assistance for their issues are: "they thought they could handle it themselves or with help from family or friends," "they did not know or think the matter was a legal issue," and "they did not think they could afford legal help so did not even consider calling anyone."
- Respondent did use assistance, and the quality of that assistance:
 - *Housing*: For respondents who used assistance to help resolve Housing issues, 59% found the assistance to be only Somewhat Helpful, Not Very Helpful, or Not Helpful At All. Among an extensive list of reasons for their dissatisfaction, the two primary ones are: "they did not spend enough time with me" and "they did not seem to have my best interests in mind."
 - *Family Matters*: For respondents who used assistance to help resolve issues related to Family Matters, 47% rated the assistance as only Somewhat Helpful, Not Very Helpful, or Not Helpful At All. Among their reasons for dissatisfaction, the three primary ones are: "they were not knowledgeable about my particular problem or matter," "they did not seem to have my best interests in mind," and "they did not spend enough time with me."
 - *Money Matters*: For respondents who used assistance to help resolve issues related to Money Matters, 50% rated the assistance as only Somewhat Helpful, Not Very Helpful, or Not Helpful At All. Among their reasons for dissatisfaction, the two primary ones are: "they did not spend enough time with me," and "they were not knowledgeable about my particular problem or matter."
 - *Life Planning*: For respondents who used assistance to help resolve Life Planning issues, 40% rated the assistance as only Somewhat Helpful, Not Very Helpful, or Not Helpful At All. Among their reasons for dissatisfaction, the two primary ones are: "they were not knowledgeable about my particular problem or matter" and "they were not competent."
 - *Dealing with Others*: For respondents who used assistance to help resolve issues related to Dealing with Others, 55% rated the assistance as only Somewhat Helpful, Not Very Helpful, or Not Helpful At All. Among their reasons for dissatisfaction, the two primary ones are: "they did not seem to have my best interests in mind" and "they were not knowledgeable about my particular problem or matter."
- Across the five issue categories, a small proportion (17%) of respondents' issues were brought to court or an administrative hearing for resolution. The issues most likely to be brought to court or a hearing are related to Family Matters.
- An attorney representing the litigant was *not* present for the proceedings in 32% of the cases that were brought to court or a hearing.
- For 20 different topics, respondents were asked to rate their general level of worry as "A Lot," "Some," or "Little or None." Greater proportions of respondents rated their level of worry as "A Lot" for four topics:
 - "My physical or mental health and medications" (44% of respondents).
 - "My income, savings, pension, stock market" (42% of respondents).

- "Long-term care and services for myself" (37% of respondents).
- "Government benefits or programs (36% of respondents).
- Among 10 methods for receiving legal information, respondents rated five methods for receiving legal information as "Very Helpful":
 - "A trustworthy referral service that would tell you which lawyer or agency to call to handle your issue, or to tell you which ones serve individuals with limited finances or limited mobility, etc." (72% of respondents).
 - "A telephone hotline where you could call and ask a lawyer questions for free" (63% of respondents).
 - "A website that provides legal information" (60% of respondents).
 - "A legal guidebook for consumers" (46% of respondents).
 - "Community programs on different legal topics" (41% of respondents).
- In Section XII of the disability survey's Report of Findings, extensive optional comments are provided by 50 respondents.