

Advancing Equity for Older Adults

Part 2: Putting Strategies into Practice

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Housekeeping

- All on mute. Use Questions function for substantive questions and for technical concerns.
- Problems getting on the webinar? Send an e-mail to NCLER@acl.hhs.gov.
- Written materials and a recording will be available at NCLER.acl.gov. See also the chat box for this web address.

About NCLER

The National Center on Law and Elder Rights (NCLER) provides the legal services and aging and disability communities with the tools and resources they need to serve older adults with the greatest economic and social needs. A centralized, one-stop shop for legal assistance, NCLER provides Legal Training, Case Consultations, and Technical Assistance on Legal Systems Development. Justice in Aging administers the NCLER through a contract with the Administration for Community Living's Administration on Aging.

About Justice in Aging

Justice in Aging is a national organization that uses the power of law to fight senior poverty by securing access to affordable health care, economic security, and the courts for older adults with limited resources.

Since 1972 we've focused our efforts primarily on fighting for people who have been marginalized and excluded from justice, such as women, people of color, LGBTQ individuals, and people with limited English proficiency.

About Bet Tzedek

Bet Tzedek Legal Services is a non-profit public interest law center that provides free legal services to low-income residents of Los Angeles County. Bet Tzedek means “House of Justice” in Hebrew.

Bet Tzedek uses direct legal services, impact litigation, community outreach, and legislative advocacy to assist low-income individuals throughout Los Angeles County

For almost 40 years, Bet Tzedek has been the only provider of elder law services in the City and County of Los Angeles.

Today, Bet Tzedek is a nationally-recognized leader and continues to serve low-income seniors, and those who care for them.



About Community Legal Services of Philadelphia

- **Our mission is to fight poverty, challenge systems that perpetuate injustice, and change lives through cutting-edge advocacy and exceptional legal representation.**
- Founded in 1966 by the Philadelphia Bar Association, **Community Legal Services (CLS)** has provided free civil legal assistance to more than one million low-income Philadelphians. Approximately 10,000 clients were represented by CLS in the past year. CLS assists clients when they face the threat of losing their homes, incomes, health care, and even their families.
- CLS attorneys and other staff provide a full range of legal services, from individual representation to administrative advocacy to class action litigation, as well as community education and social work.

Agenda

- Overview of tools & strategies for implementation
- Promising Practices: Bet Tzedek
- Promising Practices: Community Legal Services of Philadelphia
- Takeaways/Next Steps
- Q&A

Tools & Strategies for Implementation

Why Equity Matters (1 of 2)

- [Aging](#) does not protect from discrimination or related disparities. In fact, discrimination based on other identities can be exacerbated over a lifetime.
- Ageism
- Requirements under the Older Americans Act (OAA)

Why Equity Matters (2 of 2)

- Race as a social construct and structural racialization
- Example: Nursing home advocacy

Strategies to Advance Equity in the Delivery of Services

- Evaluate and collect data
- Address service gaps
- Review representation and assistance strategies

Data

- Review client demographic data to compare with demographics of the service area
- Collect data that may be missing
 - Age, race, sexual orientation and gender identity, language, and more
 - Intersectional
 - Collect in a way that builds trust with clients
- Disaggregate data among types of services or cases

Inequitable Service Gaps

- Review screening and intake
- Consider new outreach strategies and partnerships
 - Avoiding solely or primary digital outreach
 - Co-locating services
- Intentional language access measures

Review Representation and Assistance for Equity

- Staff process and involvement:
 - Discuss how racial justice and other equity issues intersect with work of teams/programs/departments.
 - Provide opportunities to share concerns and ideas about how to advance equity for older adult clients. Consider what follow-up happens.
 - Offer training and other opportunities to staff.
- Consider case acceptance methodology and its impact on specific groups of older adults who have been marginalized.

Equity Tools for Legal Services

- [JustLead Washington REJI Organizational Assessment](#)
- [Legal Aid Association of California Diversity, Equity, and Inclusion and Racial Justice Toolkit for Legal Aid Organizations](#)

Other Equity Tools

- [RaceForward Creating Cultures & Practices for Racial Equity Toolbox](#)
- [Community Catalyst Oral Health Policy Equity Tool](#)
- [National Consortium on Aging Resources for Seniors' Serving Diverse Elders](#)

The Process of Implementing Race Equity in Practice With Bet Tzedek Legal Services

Archie Roundtree, Jr.

Equal Justice Works Fellow, Elder Justice Program

Bet Tzedek Legal Services

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- Today, Bet Tzedek is a nationally-recognized leader and continues to serve low-income seniors, and those who care for them.



**For nearly 50 years,
Bet Tzedek has fought
to protect the rights of
hundreds of thousands
of low-income
Southern Californians.**

Impact Team



- The team looks across all practice areas and promulgates change through civil litigation and initiatives with an eye on leading change through issues impacting Los Angeles County constituents.
- The goal of my project is to preserve homeownership and home equity of senior constituents by providing comprehensive legal services for victims of fraud and elder abuse.
- Examples of such abuse may be deed theft, home improvement scams (including green-energy improvements financed through the Property Assessed Clean Energy (PACE)), solar energy and home alarm system scams, creditors that use unsecured debts to force the sale of a home or other emerging issues.
- A key area of focus is to expand services in Antelope Valley and underserved areas of Los Angeles County.

Reason for Exploring the Work

- Lack of advance planning, incomplete understanding of property issues, and limited access to culturally sensitive resources hinder intergenerational wealth/homeownership transfer by low-income BIPOC (Black, Indigenous, People of Color) homeowners.
- We continue to see the ongoing devastation of the pandemic and continued systemic issues within generational wealth transfer.
 - Losing a home can thrust several generations into housing instability with little-to-no safety net.
 - Decades of government-sponsored housing segregation, private discrimination, and structural racialization have created an enormous racial gap in homeownership, which is the prime driver of the ongoing wealth gap.
- Various departments at Bet Tzedek noticed the need for more understanding, more community outreach, and needed resource allocation for this area.

Project Description

- Our project developed effective and impactful ways to protect Black and Latinx homeowners through a combination of outreach, education, and legal services.
- We will support revitalizing and bridging the gap in services to create housing stability, safety, and intergenerational wealth transfer through the legal mechanism of advance planning.



Project Goals

- Strengthen communities of BIPOC low-income homeowners
- Decrease BIPOC low-income homeowners in probate
- Increase access to Advance Planning for BIPOC low-income homeowners
- Increase awareness of advance planning within BIPOC low-income communities
- Build network of individuals and organizations who work with BIPOC low-income homeowners (e.g., financial planners, homeowner organizations, housing counselors, community preservation organizations, elected officials)
- Establish and train network of pro bono attorneys, tax and financial professionals, and other volunteers to work with BIPOC low-income homeowners
- Establish a sustainable homeowner protection program at Bet Tzedek that focuses on serving low-income BIPOC communities

The Development of Expanding Racial Justice Work

- Educate yourself and team
 - Always allow room to grow in your area of exploration. Do not allow past success or experience to keep you docile or working in the same channels.
 - The team submitted an application to Shriver Center: Racial Justice Institute to further explore concepts that best deal with our project.
 - Systemic Racism, Structural Racialization, Community Lawyering, Framing and Communication
- Allow for continued augmentation of project. Seek information from key constituent groups to further develop your project goals.
 - Ex. Community groups, luminary individuals with community trust, churches, temples, lawyers and individual constituents in the community.
- Augment your current work with concepts modeled for future project.
- Explore internal needs and external needs to move forward.

Combining Like-Minded Ideas

- **Housing Focus**
 - Our proposed team project is to design effective and impactful ways to protect homeowners, through a combination of outreach, education, and legal services, including assistance with fraud to protect the home as an asset.
 - Our goal is to develop a project involving a service delivery model that can stabilize and preserve vulnerable communities by protecting BIPOC homeowners, particularly seniors, and their families.
- **Advance planning addition focus combining cornerstone issues**
 - The team realized our current housing goals had a key nexus with advance planning that truly would support the community.
 - After internal talks we realized other team members were also focused on advance planning more broadly. We combined our thoughts and ideals to focus more narrowly on our current goals.
- **Goal**
 - Project should be community centered with a focus on residents needing critical legal services and support.
 - This is best ascertained by brainstorming with multi-disciplinary teams within your organizations to develop strategy that supports the community.

Resources Moving Forward (1 of 2)

- Team Focus
 - We coordinated project focus.
 - We organized project development in our internal cohort through weekly meetings which allowed for detailed discussions and comprehensive planning in the weeks that followed.
 - We conducted an in-person meeting during the pandemic where we completed a mapping-exercise that helped us better visualize our project.
- Internal Coordination
 - You must discuss from all spheres of your organization.
 - Identify the key stockholders to inform them on direction and input on any augmentation they may see to enhance project.

Resources Moving Forward (2 of 2)

- External Coordination
 - Talk to the community at all stages to see how the problem is transforming.
- Workload management
 - Approach equity advancement in your practice by understanding that the primary thing that will change is the way you approach and commit to your work. The work you do and the time you commit does not change. This will take conversations to understand how you currently are missing opportunities to effectively respond to the needs of diverse clients.

Asset Mapping Resources

- This is a system that can allow a team to understand community development through highlighting and encouraging community growth. Asset mapping allows for gathering existing community resources and support in the locality of interest.
- The benefit of asset mapping is to identify the community strengths amongst organizations, corporations, individuals, and government institutions, etc.
- The conclusion of the process will allow you to understand what areas of support are needed within the community and ways to structure more resources for the given area.

Intergenerational Communication Resources

- The goal of intergenerational communication is to foster greater communication and knowledge between individuals from different age groups.
- When working with underserved communities and older adults, one must focus on a holistic approach. Speaking on issues that affect all in the community will help individuals avoid harm.
- Acknowledging and highlighting the hardships prevalent in communities and discussing the similarities amongst age groups will help destigmatize generational problematic areas.
- The goal is to facilitate intergenerational informational sessions to inform community of new findings within housing area and elder issues.

Action Items Moving Forward

- Continue discussions of intergenerational communication
 - Include the wisdom of the directing attorneys for messaging and outreach.
 - Allow younger and new attorneys to utilize innovative and advancing social media platforms to allow communications and outreach to raise the voices that may not be heard.
 - Integrate newer platforms such as Tik Tok and Clubhouse with advocacy and continue to use the dominant Facebook and Instagram to allow messaging.
- This is a marathon not a race. Continue to alter your own outreach and civil services methodology to reach communities that are otherwise forgotten.
- Take the time to continually practice community lawyering so you are supporting the community and not your own ideals.
- Allow for unconventional ideas to flourish to build new avenues

Community Legal Services of Philadelphia (CLS)

CLS: Our Goal

- Become an equitable antiracist organization
- Create equitable advocacy processes
- Address drivers of disparity that disrupt the reduction of poverty

CLS: Our Model

- Internal First, Organizational Second, Structural Last
- No equitable practice without equitable process. No equitable process without institutional assessment. No institutional assessment without internal assessment of leadership and organizational culture.
- Led by those with the will to do race equity work, which could include management and/or general staff.

CLS: Important Steps (1 of 2)

Three Steps

1. Education

- Learn About Issue Specific Disparity, Historic Racialized Policy Decisions, Racialized History of Programs, Community Led Lawyering, Equitable Partnerships, Debiasing Advocacy & Client Work

2. Assessment

- Internal Process Assessment, Client Surveys, Partner Feedback
- How are we interacting with partners/clients? Using or In Partnership? Are we co-developing or asking for sign-ons?
- What work are we doing? How did we decide what issue and angle to address issue?

CLS: Important Steps (2 of 2)

3. Reconstruction

- Reconstruction = Practice & Equitable Implementation. Must come after education and assessment. You can't create what you don't reflect. You can't reflect what you don't understand.
- Communicate—External Partners & Clients

CLS: Resources Needed

Resources Needed For Implementation

1. Organizational Will
2. Time
3. Person-Power
4. Creativity

CLS: Challenges

1. Ego
2. Limited Time, Person-Power
3. Funding Restrictions (LSC Funding)

CLS: Opportunities & Lessons Learned

1. Have empathy, be humble
2. Communicate reasoning clearly
3. Focus on the friendly
4. Be creative
5. Race equity is urgent, but not overnight

Questions?

Poll

- What information on equity would you like to receive?
 - A. General resources on equity and older adults, such as historical, statistical, and trends
 - B. More examples or models on advancing equity from other organizations
 - C. Resources for starting the conversation around equity internally within your organization
 - D. Information on population-specific equity issues and/or intersectionality
 - E. Other (please share in questions box)

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Case Consultations

Case consultation assistance is available for attorneys and professionals seeking more information to help older adults. Contact NCLER at ConsultNCLER@acl.hhs.gov.