

Professional Defenders

Assigned Counsel Program

Michelle Parker, Executive Director

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Officers 2024-2025

Joseph Terranova President

Anne Joynt Vice President

Pamela Thibodeau Secretary

Ayoka Tucker Treasurer

Kevin Stadelmaier First Deputy Defender Criminal Division

Yvonne Vertlieb Second Deputy Administrator **Family Division**

Lori A. Hoffman Deputy for Quality Assurance

David Heraty Deputy for Litigation Support And Appellate Bureau

Matthew Powers Deputy for Legal Education Director of the John R. Nuchereno Center for Legal Excellence

Kevin C. Condon Deputy for Child Welfare

Mission Statement

We strive to help those who cannot help themselves; who face steep odds against the power of the State; and who struggle with poverty, mental issues, helplessness, and dread. We save lives and we save families. We are the first line of defense for the freedoms granted to us by the U.S. Constitution and the Bill of Rights.

July 30, 2024

Via email only: jflynn@lippes.com John J. Flynn, Esq. LippesMathias, LLP 50 Fountain Plaza, Suite 1700 Buffalo NY 14202

Re: Document Request of the Erie County Task Force on Indigent Representation

Dear Co-chair Flynn:

Pursuant to your request of July 15, 2024, please find the following documents submitted on behalf of the Erie County Bar Association's Assigned Counsel Program ("Program"):

- 1. Program operating budgets for 2022, 2023 and 2024.
- 2. Staffing numbers for 2022, 2023 and currently in 2024.
- 3. Current organizational chart.
- 4. List of every current full-time employee, their title and salary.
- 5. List of every current part-time employee, their title and salary (incorporated into the table responsive to request no. 4).
- 6. List of every attorney on the panel along with their total compensation for the years 2022, 2023 and the first half of 2024.
- 7. Breakdown of number of cases handled per year for 2022, 2023 and the first half of 2024.
- 8. Incorporating documents and bylaws.
- 9. Eligibility screening procedures.
- 10. List of all government and/or foundation funding sources (including grants) and amounts allocated for 2022, 2023 and the first half of 2024;
- 11. Total amount of private individual donations received in 2022, 2023 and the first half of 2024.

In response to query no. 12: no Program employee is a member of a labor union.

Additional Information For Consideration

Also available to the Task Force is the following information which provide important context for the work that the Program performs and can assist the Task Force to make an informed recommendation to the County Executive:

- The annual Performance Measures Progress Report to the NYS Office of Indigent Legal Services which demonstrate how the Criminal division employed *Hurrell-Harring*¹ funding to supplement county funding for improved quality for criminal representation. The Reports specify how the Program has increased the quality of the defense for the clients by, *inter alia*:
 - ensuring that caseloads are manageable.
 - by providing co-counsel and mentoring support to the panel.
 - by engaging in holistic defense strategies by connecting clients with social services, mental health resources and other rehabilitative services.
 - by providing investigative support; and
 - by applying mitigation support to achieve non-carceral outcomes or reduce the scope of reliance upon incarceration:
 - i. 4/1/21 to 3/31/22.
 - ii. 4/1/22 to 3/31/23, and
 - iii. 4/1/23 to 3/31/24.
- 2. The Program's reports to the Redlich Horowitz Foundation outlining how the Family Court division has relied upon the grant to provide pre-petition support to, *inter alia*, promote racial equity and improved outcomes for vulnerable families facing complex trauma barriers:
 - i. November 30, 2023, and
 - ii. June 5, 2024.
- The Program's Panel Attorney Handbook.

These documents are available upon your request. We remain at your disposal should there be any other information required and we look forward to a meeting with the Task Force on August 27, 2024, at 1 p.m. of the Office of the Federal Public Defender.

Thank you for your attention.

Very truly yours, Michelle Parter

Michelle Parker

Attmts.

cc: Program Board Executive Committee

¹ The settlement in the matter of *Hurrell-Harring v. State of NY*, 15 N.Y.3d 8, 20 (2010) which required the State to make a significant investment in improved quality public defense to five counties (Onondaga, Ontario, Schuyler, Suffolk and Washington); codified and extended statewide by the 2017 amendments to Executive Law § 832 and County Law §722-e.

ERIE COUNTY ASSIGNED COUNSEL PROGRAM BUDGETS FOR 2022, 2023 AND 2024

22	REVENUE/EXPENSES BY FUND											
	udget Final Audited											
eraung bu	luget rinat Auditeu		NYS FUNDING		OTHER GRANT	•	DONATIONS				1	
	PERMIT		NISFUNDING	DCJS	OTHER GRANT	J	The second secon	Destricted	Destricted Attaches			
	REVENUE						Unrestricted	Restricted	Restricted Attorney			
LCODE	The state of the s	ERIE COUNTY	NYS/ILS	NYS/ATD	NIAG CTY	INTEREST	Memorial Donations	Atty Recognition Event	Donate/Training		TOTALS	
	Total Revenue	\$ 9,169,256.00	\$ 5,419,500.09	\$ 130,605.00	\$ 27,500.01	\$ 6,523.72	\$ 1,980.00	\$ 18,348.00	\$ 10,022.00		\$ 14,783,734.82	
				DCJS			Unrestricted	Restricted	Restricted Attorney	Expenses not		
	EXPENSES	ERIE COUNTY	NYS/ILS	NYS/ATD	NIAG CTY	INTEREST	Memorial Donations	Atty Recognition Event	Donate/Training	covered by Erle Cty		
	PROGRAM (INDEPENDENT CONTRA	CTORS)										
5000	PANEL ATTORNEY FEES	\$ 7,524,490.30	\$ 2,166,711.66	\$ 130,605.00							\$ 9,821,806.96	
5100	TRANSCRIPTS	\$ 6,892.49	\$ 75,880.09								\$ 82,772.58	
5110	EXPERTS	\$ 72,376.10	\$ 203,101.00								\$ 275,477.10	
5115	INTERPRETERS	\$ 904.45	\$ 11,130.00								\$ 12,034.45	
	INVESTIGATORS	\$ 5,506.54									\$ 25,991.53	
	SOCIAL WORKERS	\$ 100.50	The second secon		\$ 54.19						\$ 8,490.01	
	PROCESS SERVERS (ATTY FEES)	\$ 22,457.00	\$ 0,000.0E		9 01120						\$ 22,457.00	
	ADMIN COSTS/PERSONNEL	4 207.00					-				22,407.00	
	BANK SERVICE CHARGES	\$ 1,558.46									\$ 1,558.46	
	Construction of the Constr	The second secon	£ 045 047.00		6 0.547.70						\$ 1,558.46	
	HEALTH/DENTAL/VISION INSUR		\$ 245,347.62		\$ 2,617.72							-
	INSURANCE	\$ 15,076.26							-		\$ 18,528.73	
	LEGAL PUBLICATIONS	\$ 2,676.65	\$ 21,604.35								\$ 24,281.00	
-	MISC	\$ 2,232.27									\$ 2,232.27	
	MISC VOLUNTEER SUPPORT	\$ 1,465.81									\$ 1,465.81	
6045	PAYROLL SERVICE	\$ 5,014.87	\$ 2,924.91								\$ 7,939.78	
6050	RECRUITMENT/TEMPORARIES	\$ 5,783.64									\$ 5,783.64	
6051	INTERNS/LAW STUDENT		\$ 1,000.00								\$ 1,000.00	
6055	PHONE	\$ 13,638.11	\$ 23,147.89		\$ 228.56						\$ 37,014.56	
6060	POSTAGE	\$ 1,134.75									\$ 1,134.75	
6065	TRAINING	\$ 10,049.55	\$ 110,320.24								\$ 120,369.79	
6070	ACCOUNTANT	\$ 9,500.00									\$ 9,500.00	
	COMPUTER MAINT/CONSULT	\$ 34,189.11	\$ 126,501.16								\$ 160,690.27	
100000000000000000000000000000000000000	CONSULTANTS	\$ (2,451.55)	A STATE OF THE PARTY OF THE PAR								\$ 23,275.75	
	RENT	- Contract C	\$ 147,624.96								\$ 226,982.81	
	UTILITY	\$ 767.70				-					\$ 3,026.66	
	REPRODUCTIONS	\$ 9,410.79							-		\$ 15,422.94	
- Contract C	SUPPLIES	\$ 19,193.96	The second secon		\$ 46.00						\$ 28,601.20	
	EQUIPMENT NON CAPITAL	\$ (941.43)	The state of the s		\$ 40.00						\$ 23,110.78	
	CONFERENCES/TRAVEL	\$ 9,066.46									\$ 23,039.83	
	A CONTRACTOR OF THE CONTRACTOR	\$ 9,066.46										
-	VEHICLE LEASE	A F F F F F F F F F F F F F F F F F F F	\$ 5,668.28								\$ 5,668.28	
1.755.001.101	DUES	\$ 5,585.98	The second secon		A 48 888				-		\$ 8,113.98	-
	WAGES		\$ 1,860,866.07		\$ 19,899.94						\$ 2,730,658.00	
6110		\$ 105,530.38	\$ 95,098.43		\$ 1,551.73						\$ 202,180.54	
	NYSUI	\$ 12,896.47			\$ 792.00						\$ 13,688.47	
	DISABILITY	\$ (1,764.51)			\$ 9.90						\$ (1,754.61)	
	WORKERS COMP	\$ 5,988.63			\$ 56.37						\$ 6,045.00	
	PENSION	\$ 145,367.47	\$ 123,307.66		\$ 1,874.80						\$ 270,549.93	
6170	ATTORNEY RECOGNITION EVENT							\$ 8,868.03			\$ 8,868.03	
6180	VOUCHER PROCESSING	\$ 12,791.20	\$ 45,000.00								\$ 57,791.20	
6200	DEPRECIATION								\$ 27,843.00	\$ 3,395.00	\$ 31,238.00	
		\$ 9,189,419.98	\$ 5,381,420.33	\$ 130,605.00	\$ 27,131.21	\$ -	\$.	\$ 8,868.03	\$ 27,843.00	\$ 3,395.00	\$ 14,768,682.55	
	NET (REVENUE-EXPENSES)	\$ (20,163.98)	\$ 38,079.76	s -	\$ 368.80	\$ 6,523.72	\$ 1,980.00	\$ 9,479.97	\$ (17,821.00)	\$ (3,395.00)		
	ASSETS/CAPITAL ITEMS		\$ 38,079.76							1		
		\$ (20,163.98)	The state of the s	\$ -	\$ 368.80	\$ 6,523.72	\$ 1,980.00	\$ 9,479.97	\$ (17,821.00)	\$ (3,395.00)	\$ 15,052.27	Subtotal Profit(los
		(20,200,00)	(5.00)	-	use \$368.80	- 0,000.72	4,500,00	0,470.07	(27,022,00)	(0,030,00)	\$ 15,052.27	less Erie County Ex
	DAVBACK TO EDIE COUNTY				Contract and and and and							
	PAYBACK TO ERIE COUNTY				2023 expenses						\$ 15,052.27	Profit/Loss
	Approximate Excess Funds	\$ -			for Niagara Cty							

HOOIGNED	COUNSEL PROGRAM				2								
023	REVENUE/EXPENSES BY FUND												
perating E	Budget - prior to Final Audited Finan	icial Statements											
рекоппъ			NYS FUNDING			OTHER GRANT	S		DONATIONS				
	REVENUE		WIGIGHDING	DCJS	DCJS	OTTIER ORDER	REDLICH		Attorney	Panel Attorney			
S/L CODE	- Carrier Control	ERIE COUNTY	NYS/ILS	NYS/ATD	HATE CRIME	NIAG CTY	HORWITZ	INTEREST	Recognition Event	Donate/Training	TOTALS		1
3/L GODE			173.7737.7335						\$ -				-
	Total Revenue	\$ 17,581,238.00	\$ 6,732,362.36	\$ 104,404.00	\$ 8,362.00	\$ 110,625.04	\$ 150,000.00	\$ 98,707.59	•	\$ 9,670.00	\$ 24,795,848.99		-
					2202				12.10				-
	Name and Associated a			DCJS	DCJS	(produced service)	REDLICH	Expenses	Attorney	Panel Attorney			-
	EXPENSES	ERIE COUNTY	NYS/ILS	NYS/ATD	HATE CRIME	NIAG CTY	HORWITZ	INTEREST	Recognition Event	Donate/Training			-
	PROGRAM (INDEPENDENT CONTR	ACTORS)											_
5000	PANEL ATTORNEY FEES	\$ 12,920,420.44	\$ 2,919,842.18	\$ 104,484.00							\$ 15,944,746.62		
5100	TRANSCRIPTS	\$ (3,200.16)	\$ 77,024.49								\$ 73,824.33		
5110	EXPERTS	\$ (47,267.90)	\$ 309,491.80								\$ 262,223.90		
5115	INTERPRETERS	\$ 2,555.40	\$ 13,172.37								\$ 15,727.77		
5120	INVESTIGATORS	\$ (187.21)	\$ 25,646.91								\$ 25,459.70		
5125	SOCIAL WORKERS	\$ 261.16									\$ 8,074.88		
	PROCESS SERVERS (ATTY FEES)	\$ 29,584.00	1000000								\$ 29,584.00		
	ADMIN COSTS/PERSONNEL										4		
EODE	BANK SERVICE CHARGES	\$ 1,519.53						\$ 625.00			\$ 2,144.53		-
			\$ 297,142.44		-	\$ 6,702.68	\$ 1,511.45	020.00			\$ 457,488.43		-
-	HEALTH/DENTAL/VISION INSUR		1177			\$ 0,702.08	φ 1,311.45						-
	INSURANCE	\$ 16,189.27									\$ 21,546.27		-
	LEGAL PUBLICATIONS	\$ (2,801.35)	\$ 37,378.73							-	\$ 34,577.38		-
100000000	MISC	\$ 875.08									\$ 875.08		-
	MISC VOLUNTEER SUPPORT	\$ 1,684.83									\$ 1,684.83		-
6045	PAYROLL SERVICE	\$ 5,350.90	\$ 3,245.75			\$ 78.36					\$ 8,675.01		
6050	RECRUITMENT/TEMPORARIES	\$ 8,392.00	\$ 9,196.00								\$ 17,588.00		
6051	INTERNS/LAW STUDENT		\$ 2,000.00								\$ 2,000.00		
6055	PHONE	\$ 13,437.63	\$ 25,082.15			\$ 685.70	\$ 305.73				\$ 39,511.21		
6060	POSTAGE	\$ 12.90	\$ 3,633.48								\$ 3,646.38		
	TRAINING	\$ 3,332.82									\$ 82,300.58		
	ACCOUNTANT	\$ 11,750.00	1 17455130.3								\$ 11,750.00		
	COMPUTER MAINT/CONSULT		\$ 131,817.73			\$ 474.96	\$ 399.99				\$ 183,483.63		
	CONSULTANTS	\$ 125.00				4 474.50	9 000.00				\$ 19,236.00		
101000			172								3		-
110000000000000000000000000000000000000	RENT	\$ 76,587.09											-
	UTILITY	\$ (0.01)									\$ 3,069.04		-
	REPRODUCTIONS	\$ 4,424.66									\$ 9,140.64		-
6085	SUPPLIES	\$ 16,592.68									\$ 25,266.87		-
6086	EQUIPMENT NON CAPITAL	\$ (12,323.07)	\$ 90,054.97			\$ 675.99					\$ 78,407.89		
6090	CONFERENCES/TRAVEL	\$ 6,859.46	\$ 9,908.85								\$ 16,768.31		
6093	VEHICLE LEASE	\$ 89.00	\$ 6,536.56								\$ 6,625.56		
6095	DUES	\$ 881.69	\$ 4,467.00								\$ 5,348.69		
6100	WAGES	\$ 869,445.46	\$ 2,079,851.04			\$ 88,500.48	\$ 82,634.56				\$ 3,120,431.54		
6110	FICA		\$ 145,679.67			\$ 5,971.91	\$ 6,121.16				\$ 232,648.71		
	NYSUI	\$ 15,230.73				\$ 388.41	The state of the s				\$ 15,959.85		
22.3111.0	DISABILITY	\$ 2,245.10				\$ 23.87	V 040.71				\$ 2,268.97		1
	WORKERS COMP	\$ 2,419.74	\$ 4,838.36			\$ 250.37	\$ 264.53				\$ 7,773.00		1
		\$ 2,419.74									17/10		-
	PENSION			-		\$ 7,441.12	\$ 8,263.40						+
	VOUCHER PROCESSING	\$ -	\$ 67,099.20								\$ 67,099.20		-
6200	DEPRECIATION									\$ 35,097.00	\$ 35,097.00		-
		\$ 14,321,663.75	\$ 6,729,668.37	\$ 104,484.00	\$ -	\$ 111,193.85	\$ 99,841.53	\$ 625.00	\$ -	\$ 35,097.00	\$ 21,402,573.50		
	NET (REVENUE-EXPENSES)	\$ 3,259,574.25	\$ 2,893.99	\$ -	\$ 8,362.00	\$ (368.81)	\$ 50,158.47	\$ 98,082.59	\$ -	\$ (25,427.00)			
1700	ASSETS/CAPITAL ITEMS		\$ 2,893.99		\$ 8,362.00								
		\$ 3,259,574.25			\$ -	\$ (368.81)	\$ 50,158.47	\$ 98,082.59	\$ -	\$ (25,427.00)	\$ 3,393,275.49	Subtotal Profit/Loss	
efore Offi	cial Audited Statement =					Memorial			investment sweep mth			less Erie County Excess Amoun	nt
	PAYBACK TO ERIE COUNTY								The state of the s		\$ 133,701.24	The first property of the contraction of the same of the contraction o	
	Approximate Excess Funds	\$ 3,259,574.25	**actual amoun	t await audit com	pletion						200,702,007		1
	Pr. Santa Landado I Milda		but this is a close		Section 1								1
LOTE:			Ductins is a close	estimate	1								-
NOTE:	Erie County also received extra reve	inué											-
	from NYS/ILS for 18-B Rate												
	Increase 4/1/23-12/31/23												1
	50% of new rate difference	\$ 1,265,269.05											
herefore:	Expense for Erie County to fund	\$ 17,581,238.00	Amount Budgete	d/paid to ACP						THE PARTY			
	ACP's in 2023 =				NATURAL OCCUPATION AND ADDRESS.	County after aud	paper-water						1

\$ 1,265,269.05 less: Revenue received from NYS/ILS for 50% costs of Rate Increase for vouchers paid 2023 with billiable hours from 4/1/23-12/31/23 \$ 13,056,394.70 ACTUAL COST TO ERIE COUNTY FOR 2023 18-B funding to ACP (approximate - see note above)

2023

P. S.	NSEL PROGRAM										-			-
	REVENUE/EXPENSES BY FUND													
Operating Budg	et - prior to Final Audited Financial Sta	tements												
			NYS FUNDING			OTHER GRAN	TS		DONATIONS					
	REVENUE			DCJS	DCIS		REDLICH		Attorney	Panel Attorney				
G/L CODE	FUND	ERIE COUNTY	NYS/ILS	NYS/ATD	HATE CRIME	NIAG CTY	HORWITZ	INTEREST	Recognition Event	Donate/Training	TOTAL	S		
	Total Revenue	\$ 10,161,216.50	\$ 5,334,105.19		\$ 25,158.40	\$ 56,650.00	\$ 75,000.00	\$ 137,125.00	\$ 5,233.00		\$	15,794,488.09		
				DCJS	DCJS		REDLICH	Expenses	Attorney	Panel Attorney				
	EXPENSES	ERIE COUNTY	NYS/ILS	NYS/ATD	HATE CRIME	NIAG CTY	HORWITZ	INTEREST	Recognition Event	Donate/Training				
	PROGRAM (INDEPENDENT CONTRAC	TORS)												
5000	PANEL ATTORNEY FEES	\$ 7,994,793.00	\$ 3,452,767.00								\$	11,447,560.00		
	TRANSCRIPTS		\$ 63,626.00								\$	63,626.00		
	EXPERTS		\$ 102,529.00								\$	102,529.00		
2007	INTERPRETERS		\$ 7,626.00								S	7,626.00		
	INVESTIGATORS		\$ 12,469.00								\$	12,469.00		
	SOCIAL WORKERS		\$ 2,799.00								\$	2,799.00		
100000	PROCESS SERVERS (ATTY FEES)	\$ 12,359.00	4 2,700.00							-	s	12,359.00		
0200	ADMIN COSTS/PERSONNEL	Ψ 12,000.00									-	12,000.00		-
cons	The state of the s	\$ 790.00					-	¢ 750.00			\$	1 540 00		
	BANK SERVICE CHARGES		¢ 140 000 00			¢ 2500.04	¢ 05740	\$ 750.00			\$	1,540.00		
	HEALTH/DENTAL/VISION INSUR		\$ 142,286.86			\$ 3,596.04	\$ 857.10	-				231,996.00		-
	INSURANCE	\$ 9,077.00	ê 40.000.00		-		-	-			\$	9,077.00		-
	LEGAL PUBLICATIONS	d 404F 20	\$ 12,538.00		-		-	-			\$	12,538.00	-	_
33.13	MISC	\$ 1,915.00					-	-			\$	1,915.00	-	-
	MISC VOLUNTEER SUPPORT	\$ 918.00			-			_			\$	918.00		_
	PAYROLL SERVICE	\$ 2,463.00	The second secon		-						\$	4,881.00		
	RECRUITMENT/TEMPORARIES	\$ 3,565.00	\$ 5,800.00								\$	9,365.00		-
1	INTERNS/LAW STUDENT	42 3000000000	\$ 2,000.00			20 000000	-				\$	2,000.00		
	PHONE	\$ 8,000.00				\$ 342.85	\$ 153.00				\$	19,199.00		
	POSTAGE		\$ 1,441.00								\$	1,441.00		
6065	TRAINING	\$ 1,294.00	\$ 70,279.00		1						\$	71,573.00		
6070	ACCOUNTANT										\$			
6071	COMPUTER MAINT/CONSULT	\$ 23,455.00	\$ 57,112.52		\$ 5,200.00	\$ 237.48	\$ 200.00				\$	86,205.00		
6072	CONSULTANTS		\$ 18,397.00								\$	18,397.00		
6075	RENT	\$ 42,721.00	\$ 73,812.00								\$	116,533.00		
6045	UTILITY		\$ 1,534.00								\$	1,534.00		
6080	REPRODUCTIONS	\$ 1,922.00	\$ 2,140.00								\$	4,062.00		
6085	SUPPLIES	\$ 12,721.00	\$ 1,839.00								\$	14,560.00		
6086	EQUIPMENT NON CAPITAL	\$ 251.00	\$ 46,124.60		\$ 19,958.40						\$	66,334.00		
	CONFERENCES/TRAVEL	\$ 10,203.00									S	10,872.73		
	VEHICLE LEASE		\$ 7,227.27								S	7,227.27		
	DUES	\$ 2,697.00									\$	5,332.00		
	WAGES		\$ 1,019,875.03			\$ 39 485 11	\$ 55,528.86				s	1,575,056.00		_
	FICA	\$ 33,917.00	The particular and the second	1	-	\$ 3,020.61		-			\$	117,900.00		-
	NYSUI	\$ 5,234.00		-		\$ 275.00	-	-			\$	13,044.00		-
	DISABILITY	\$ 3,867.06	¥ 7,200.00	-	1	\$ 275.00	275.00				\$	3,879.00		-
	WORKERS COMP	3,867.06				\$ 11.94					\$	3,879.00		
		\$ 50,070,00	¢ 00 000 00	-	1	\$ 2040 F4	¢ 5 550 00				\$		-	_
	PENSION	\$ 50,870.00	\$ 96,668.60		-	\$ 3,948.51	\$ 5,552.89	-	0 504700		-	157,040.00		-
	ATTORNEY RECOGNITION EVENT		A 00011		-			-	\$ 5,617.00		\$	5,617.00	-	-
-	VOUCHER PROCESSING	\$ 2,500.00	\$ 32,814.00		_						\$	35,314.00		-
6200	DEPRECIATION			-		A					\$			-
		\$ 8,770,955.06	\$ 5,334,105.19	\$ -	\$ 25,158.40	\$ 50,917.54	\$ 66,814.81	\$ 750.00	\$ 5,617.00	\$ -	\$	14,254,317.99		
	Discourse of Carrier State Comments of Carrier Comments	Table Sections of the Control of the							- J.					
	NET (REVENUE-EXPENSES)	\$ 1,390,261.44	\$.	\$ -	\$ -	\$ 5,732.47	\$ 8,185.19	\$ 136,375.00	\$ (384.00)	\$ -				
1700	ASSETS/CAPITAL ITEMS													
		\$ 1,390,261.44	\$ -	\$ -	\$ -	\$ 5,732.47	\$ 8,185.19	\$ 136,375.00		Automotive and a second	\$	1,540,170.10	Subtotal Profit/Los	S
Before Official A	Audited Statement =							\$750.00 is the	investment sweep mthly	charges	\$	1,390,261.44	less Erie County Ex	cess Amo
	PAYBACK TO ERIE COUNTY										\$	149,908.66	Profit/Loss	
	Approximate Excess Funds 1/2 yr	\$ 1,390,261.44	Thru 6/30/24, ur	audited appr	oximate paybac	k to Erie County								
NOTE:	Erie County also received extra revenue	9												
	from NYS/ILS for 18-B Rate													
	Increase 1/1/2024-6/30/2024													
	50% of new rate difference	\$ 2,331,255,30	6 month reimbu	sement							1			
	OUT OF THE WILLIAM CONTROL OF THE WILLIAM CON	a 2,001,200.30	O mondificanibu	Jane H										_
Therefore:	Expense for Erie County to fund	\$ 10.101.010.00	Amount Budget	d/paid to 40	D for 6 months		-				1			-
merenore.	ACP's in 2023 =		Amount Budgete			sore Europe that	mould be noted to	ack to Eria Ca	n ofter audit is sevent					
	AGE 5 III 2025 -								y after audit is complete	than 414 (00				-
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ERIE COUNTY ASSIGNED COUNSEL PROGRAM STAFFING NUMBERS FOR 2022, 2023 AND 2024

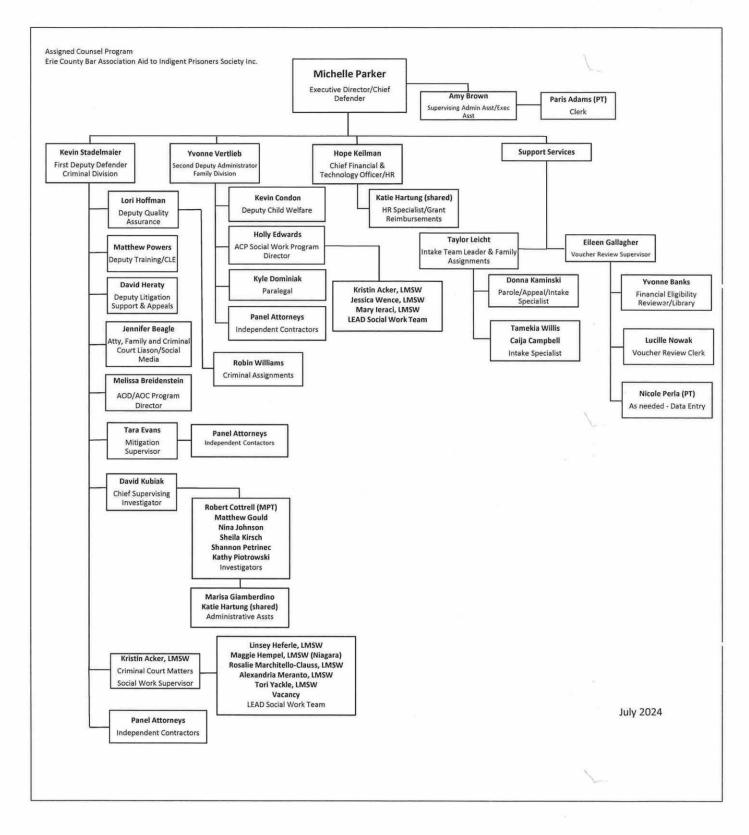
ASSIGNED COUNSEL PROGRAM			
STAFF LEVELS			
2022-2024			
Туре	2022	2023	2024
Deputy Attorneys(Supervising)	8	9	8
Support Staff	18	18	17
Investigators	7	7	7
Social Workers (All LMSW's)	9	10	9
	42	44	41
Labor Union representation=	NONE		





CURRENT ERIE COUNTY ASSIGNED COUNSEL PROGRAM ORGANIZATIONAL CHART





CURRENT ERIE COUNTY ASSIGNED COUNSEL PROGRAM EMPLOYEE TITLE/SALARY INFORMATION

ERIE COUNTY
ASSIGNED COUNSEL
PROGRAM CASE
ASSIGNMENTS BY
CATEGORY FOR 2022,
2023 AND 2024



ASSIGNED COUNSEL PROGRAM			
BREAKDOWN OF CASES HANDLED PER YEAR			
2022, 2023 and 2024(6 months)			1/1/24-
Type of Matter	2022	2023	6/30/2024
Misdemeanors/Violations-Town/Village	10335	11401	6401
Misdemeanors/Violations-Buff City Conflict cases	500	609	394
Felonies- Town/Village originate	3235	3463	1830
Felonies- A,B,C Buffalo City	1204	1268	778
Post Conviction	490	543	194
Parole Violation	255	219	121
Appeals Criminal Court	37	44	20
Raise the Age	184	146	158
Family Court	7100	6692	4410
Appeals Family Court	49	64	34
Total Cases	23389	24449	14340

ERIE COUNTY
ASSIGNED COUNSEL
PROGRAM ARTICLES
OF INCORPORATION
AND SUPPORTING
DOCUMENTS



AMENDED AND RESTATED CERTIFICATE OF INCORPORATION OF ERIE COUNTY BAR ASSOCIATION AID TO INDIGENT PRISONERS SOCIETY, INC

Under Section 805 of the Nor-For-Profit Corporation Law

- 1. The name of the Corporation is Erie County Bar Association Aid to Indigent Prisoners Society, Inc.
- 2. The original Certificate of Incorporation was filed by the Department of State on May 23, 1962. A Certificate of Amendment of the Certificate of Incorporation was filed by the Department of State on December 10, 1986.
- The Certificate of Incorporation is hereby amended (a) to expand the corporate purposes to include giving legal assistance and providing representation to needy persons having matters the County of Erie and State of New York and Family Court, Surrogate's Court, County Court or Supreme Court, or before Judicial Hearing Officers or Administrative Law Judges in all such matters in which there is provided by law or right to counsel at public expense if the person is unable to afford to retain private counsel and (b) to change the Post Office address to which the Secretary of State shall mail a copy of any process against the Corporation served upon the Secretary, and (c) to delete Articles Fifth and Sixth of the original Certificate of Incorporation.
- 4. The text of the Certificate of Incorporation is hereby restated as amended to read as herein set forth in its entirety:
 - (1) The name of the Corporation is Erie County Bar Association Aid to Indigent Prisoners Society, Inc.
 - (2) The Corporation is a corporation as defined in subparagraph (a)(5) of Section 102 of the Not-For-Profit Corporation Law of the State of New York
 - (3) The purposes for which the Corporation is formed are:
 - (a) to give legal assistance and provide representation in criminal matters to needy persons residing in or charged with a crime within the County of Erie and State of New York;

- (b) to give legal assistance and provide representation to needy persons having matters in the County of Erie and State of New York in Family Court, Surrogate's Court, Local Courts, County Court or Supreme Court, or before Judicial Hearing Officers or Administrative Law Judges, in all such matters in which there is provided by law a right to counsel at public expense if the person in need of counsel is unable to afford to retain private counsel; and
- (c) to engage in any other lawful activity that is incidental or conductive to the accomplishment of the purposes stated in subparagraphs (a) or (b) above.
- (4) The Corporation is a Type B corporation as defined in Section 201 of the Not-For-Profit Corporation Law.
- (5) The office of the Corporation is to be located in the State of New York, County of Erie.
- (6) Nothing contained in this Certificate of Incorporation shall authorize the Corporation to undertake or engage in any of the activities specified in subdivisions (b) through (t) of Section 404 of the Not-For-Profit Corporation Law or Section 460-a of the Social Services Law.

No part of the net earnings of the Corporation shall inure to the benefit of its members, directors, officers, or other private persons except that the Corporation shall be empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in this Certificate of Incorporation.

No Substantial part of the Corporation's activities shall be attempting to influence legislation by propaganda or otherwise, except as otherwise provided in Section 501(h) of the Internal Revenue Code of 1954 (or the corresponding provision of any future United States internal revenue law). The Corporation shall not directly or indirectly participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Notwithstanding any other provision of this Certificate of Incorporation, the Corporation is organized exclusively for charitable, scientific, and educational purposes as specified in Section 501(c)(3) of the Internal Revenue Code of 1954 (or the corresponding provision of any future United States internal revenue law) and shall not carry on

any activities not permitted to be carried on by a corporation exempt from federal income tax under such section.

Upon the dissolution of the Corporation, the Board of Directors shall, after paying or making provision for the payment of all of the liabilities of the Corporation, dispose of all assets of the Corporation exclusively for the purposes of the Corporation in such manner, or to such organization or organizations organized and operated exclusively for charitable, scientific, or educational purposes as shall at the time qualify as an exempt organization or exempt organizations under Section 501(c)(3) of the Internal Revenue Code of 1954 (or the corresponding provision of any future United States internal revenue law), as the Board of Directors shall determine, subject to the order of a justice of the Supreme Court of the State of New York for the county in which the principal office of the Corporation is then located.

- (7) The Secretary of State of the State of New York is designated as Agent of the Corporation upon whom process against it may be served and the Post Office address within New York State to which the Secretary of State shall mail a copy of any process against it served upon the Secretary is 670 Statler Towers, 107 Delaware Avenue, Buffalo, NY 14202.
- (8) This Amendment and Restated Certificate of Incorporation was authorized by the sole member of the Corporation, namely, the Bar Association of Erie County, acting through its Board of Directors at a meeting called for such purposes.

IN WITNESS WHEREOF, the undersigned being the duly executed President and Treasurer of the Corporation have made, subscribed and acknowledged this Certificate this 27 day of June, 2003, and affirm under penalty of perjury that the statements contained in this Certificate are true.

RICHARD J. BARNES

President

THE ATTORNEY GENERAL HAS NO OBJECTION TO THE GRANTING OF JUDICIAL APPROVAL HEREON ACKNOWLEDGES RECEIPT OF STATUTORY NOTICE AND DEMANDS SERVICE OF THE FILED CERTIFICATE SAID NO OBJECTION

IS CONDITIONED BY SUBMISSION OF THE WITHIN 30 DAYS HEREAFTER.

ATTORNEY GENERAL

ROBERT B/SOMMERSTEIN

Treasurer

STATE OF NEW YORK COUNTY OF ERIE CITY OF BUFFALO)) SS:	
On this 27	day of June	, 2003, before me personally came
Richard J. Barnes, to me kn	own and known to	o me to be the person described in and who
executed the foregoing Cert	ificate and he dul	y acknowledged to me that he duly executed
the same.		Robert Loud.
		Notary Public

ROBERT D. LONSKI

STATE OF NEW YORK COUNTY OF ERIE CITY OF BUFFALO)	SS:	
On this <u>27</u>	_day of _	June	, 2003, before me personally came

Robert B. Sommerstein, to me known and known to me to be the person described in and who executed the foregoing Certificate and he duly acknowledged to me that he duly executed the same.

Notary Public

ROBERT D. LONSKI
Notary Public, State of New York
Qualified in Erie County
My Commission Expires April 30, 20

At a Special Term of the Supreme Court of the County of Erie at the County Courthouse in the City of Buffalo, New York, on the 29th day of March, 2005.

PRESENT: HON. PENT & WOLFCANG

J.S.C

STATE OF NEW YORK
SUPREME COURT : COUNTY OF ERIE

In the Matter of the Application for Approval of an Amendment of the Certificate of Incorporation of the

ORDER

ERIE COUNTY BAR ASSOCIATION AID TO INDIGENT PRISONERS SOCIETY, INC.

Under Section 803 of the Not-for-Profit
Corporation Law.

March 29 2005

Upon reading and filing the annexed affidavit of CLAUDIA S. SCHULTZ, attorney for the Erie County Bar Association Aid to Indigent Prisoners Society, Inc., sworn to on the 28th day of March, 2005, and the Certificate of Amendment of the Certificate of Incorporation of the Erie County Bar Association Aid to Indigent Prisoners Society, Inc., annexed to the affidavit, it is

ORDERED, that the said Certificate of Amendment of the Certificate of Incorporation of ERIE COUNTY BAR ASSOCIATION AID TO INDIGENT PRISONERS SOCIETY, INC., be and the same is hereby approved and may be filed.

S.C.

FILING RECEIPT

THE THE NAME OF THE COURSE PAR ACCOUNT ON A TRUE OF TAXABLE PART OF THE PART O

ENTITY NAME: ERIE COUNTY BAR ASSOCIATION AID TO INDIGENT PRISONERS SOCIETY, INC.

DOCUMENT TYPE: AMENDMENT (DOMESTIC NFP)

COUNTY: ERIE

PURPOSES PROCESS PROVISIONS RESTATED

SERVICE COMPANY: ** NO SERVICE COMPANY **

SERVICE CODE: 00

FILED:04/20/2005 DURATION:******* CASH#:050420000651 FILM #:050420000605

ADDRESS FOR PROCESS

THE CORPORATION 670 STATLER TOWERS BUFFALO, NY 14202

107 DELAWARE AVENUE

REGISTERED AGENT

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FILER	FEES	30.00	PAYMENTS	30.00
	FILING	30.00	CASH	0.00
	TAX	0.00	CHECK	30.00
CLAUDIA S SCHULTZ	CERT	0.00	CHARGE	0.00
107 DELAWARE AVE STE 670	COPIES	0.00	DRAWDOWN	0.00
	HANDLING	0.00	OPAL	0.00
BUFFALO, NY 14202			REFUND	0.00
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NEW YORK STATE DEPARTMENT OF STATE DIVISION OF CORPORATIONS, STATE RECORDS AND UNIFORM COMMERCIAL CODE FILING RECEIPT

ENTITY NAME:

ERIE COUNTY BAR ASSOCIATION AID TO INDIGENT

PRISONERS SOCIETY, INC.

DOCUMENT TYPE:

CERTIFICATE OF CHANGE BY ENTITY

ENTITY TYPE:

DOMESTIC NOT-FOR-PROFIT CORPORATION

DOS ID:

FILE DATE:

147873

11/15/2023

FILE NUMBER:

231207003627

TRANSACTION NUMBER:

202311150001540-2632519

EXISTENCE DATE:

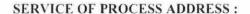
05/23/1962

DURATION/DISSOLUTION:

PERPETUAL

COUNTY:

ERIE



THE CORPORATION

403 MAIN STREET, SUITE 215, BUFFALO, NY, 14203, USA

ELECTRONIC SERVICE OF PROCESS

EMAIL ADDRESS:

N/A

FILER:

HOPE KEILMAN FOR ERIE CTY BAR ASSOC AID TO INDIGENT

PRISONERS SOC

403 MAIN STREET, SUITE 215, BUFFALO, NY, 14203, USA

You may verify this document online at:

hup://ecorp.dox.ny.gov

AUTHENTICATION NUMBER:

100004798664

\$30.00	TOTAL PAYMENTS RECEIVED:	\$30.00
\$20.00	CASH:	\$0.00
\$0.00	CHECK/MONEY ORDER:	\$0.00
\$10.00	CREDIT CARD:	\$30.00
\$0.00	DRAWDOWN ACCOUNT:	\$0.00
\$0.00	REFUND DUE:	\$0.00
	\$20.00 \$0.00 \$10.00 \$0.00	\$20.00 CASH: \$0.00 CHECK/MONEY ORDER: \$10.00 CREDIT CARD: \$0.00 DRAWDOWN ACCOUNT:

ERIE COUNTY ASSIGNED COUNSEL PROGRAM BYLAWS





AMENDED AND RESTATED
BY-LAWS
OF THE
ERIE COUNTY BAR ASSOCIATION
AID TO INDIGENT PRISONERS SOCIETY, INC.

BY-LAWS

ADOPTION AND AMENDMENTS

Adopted November 27, 1984

Amended January 26, 1993

Article II, Paragraph 1

Article III, Paragraph 1

Article V, Paragraph 2(c-k)

Amended April 1995

Article V, Paragraph 2(a)

Article V, Paragraph 2(1)

Amended May 1995

Article V, Paragraph 2

Article V, Paragraph 2(g)

Article V, Paragraph 5

Amended and Restated June 1996

Amended January 2001

Article IV, Paragraph 10

Amended March 2004

Article IV, Paragraph 2(m)

Amended March 2005

Article IV, Paragraphs 2(n) and 2(o)

Article V, Paragraphs 1 and 2

Amended January 2015

Article IV, Paragraphs 5, 6, 7, 11

Article VI, Paragraphs 1, 2, 3, 4, 5

Amended April 2017

Article II, Paragraph 2

Article IV, Paragraphs 2(n) and 2(o)

Article IV, Paragraph 3

Amended September 2020

Article I, Paragraph 1

Article II, Paragraph 2

Article IV, Paragraph 2(a) i-ix and 2(b) -2 (g), 5, 6, 7, 9, 10 and 11

Article V, Paragraphs 1, 4, 6, 7, 8(a) and (b)

Article VI, Paragraphs 1, 2, 3, 4, 5, and 6

Article VII, Paragraph 1

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Article II	Membership	4
Article III	Government	4
Article IV	Board of Directors	5
Article V	Officers	9
Article VI	Committees	10
Article VII	Amendment	12

ARTICLE I

Name

1. The name of the Association is Erie County Bar Association Aid to Indigent Prisoners Society, Inc. (the "Society").

ARTICLE II

Membership

- Member. The sole Member of the Society shall consist of The Bar Association of Erie County, acting through its Board of Directors.
- 2. <u>Functions</u>. Without limiting the powers of the Member in its capacity as sole Member of the Society pursuant to the Not-for-Profit Corporation Law, the functions of the Member are to elect and appoint Directors of the Society and to receive the report of the Society at an annual meeting to be held in the month of June.

ARTICLE III

Government

<u>Directors</u>. The affairs of the Society shall be managed by its Board of Directors.
 Except as specifically provided otherwise in these Bylaws, each Director shall serve on the Board of Directors of this Society by reason of his or her appointment by the Member.

2. Officers. The officers of this Society shall each serve in said capacity by reason of his or her election to office by the Board of Directors of the Society.

ARTICLE IV

Board of Directors

 General Powers. The affairs of the Society shall be managed by its Board of Directors.

2. Number, Tenure and Qualifications.

- (a) The number of Directors constituting the entire Board shall be no less than fifteen (15) nor more than twenty-three (23), with the actual number to be set from time to time by the Board of Directors of the Society. Each Director shall be an attorney in good standing and a current member of The Bar Association of Erie County. The Board shall be comprised of the following:
- (i) One (1) Director, to be appointed by the Member upon recommendation of the County Executive; the term of such Director shall be until the April 1st next following appointment.
- (ii) One (1) Director, to be appointed by the Member upon recommendation of the majority leader of Erie County Legislature; the term of office of such Director shall be until the April 1st next following appointment.
- (iii) One (1) Director, to be appointed by the Member upon recommendation of the minority leader of the Erie County Legislature; the term of office of such Director shall be until the April 1st next following appointment.
 - (iv) The President of The Bar Association of Erie County or his or her designee.
- (v) The Chairman of the Criminal Law Committee of The Bar Association of Erie County or his or her designee.
- (vi) The Chairman of the Practice and Procedure in Family Court Committee of The Bar Association of Erie County or his or her designee.

- (vii) The Supervising Judge of the Criminal Court in the Eighth Judicial District or his or her designee.
- (viii) The Supervising Judge of the Family Court in the Eighth Judicial District. or his or her designee (ix) The remaining Directors appointed by the Member, with the participation of the Minority Bar Association and the Women's Bar Association, for three-year terms, such terms to commence on April 1st.
- (b) Any Director may be removed with cause by the affirmative vote of 2/3 or more of those Directors present at a duly constituted meeting of the Board, prior written notice of which meeting shall have referred to the proposed action, or without cause by the Member. Unexcused absence from three (3) consecutive regular meetings of the Board of Directors may be cause for removal.
- (c) Each Director shall hold office until the expiration of the term for which she or he is appointed and until her or his successor has been properly appointed and qualified.
- (d) Vacancies created by the death, resignation, removal (with or without cause) or disqualification of a Director or increase in the number of directors shall be filled by a majority of the Directors present at a duly constituted meeting of the Board. Such Director shall serve until the following March 31. If the unexpired portion of that term extends beyond March 31, the Member shall appoint a replacement for the balance of the unexpired term.
- (e) The term of each Director shall extend through the first meeting of the Board of Directors following March 31 of the year in which his or her term expires.
- (f) Board members appointed pursuant to subparagraph 2(a)(ix) shall be limited to two consecutive full terms of three years each, in addition to whatever term may have resulted from their having completed an unexpired term. Following termination of service due to the operation of this subparagraph, re-appointment may not occur for at least one year. There shall be no limitation on years of service for non-consecutive terms.
- (g) Any Director who has just completed his or her term as President-Elect, Vice-President-Elect, Secretary-Elect, or Treasurer-Elect at a time when, pursuant to the operation of paragraph 2(f) of this Article, he or she would not be permitted to continue to serve as a Director, shall be permitted to serve for one additional year as the President, Vice-President, Secretary or Treasurer, as the case may be, and provided further, that any director who would be serving a term as Vice-President in this first additional

year, if elected to be President- Elect at the commencement of that term, may serve a second additional year as President. All other officers so extended for one additional year may not be elected to any other position as an officer of the Society until at least one year has passed during which time he or she has not served as a director.

- 3. Regular Meetings and Annual Meeting. Regular meetings of the Board shall be held five times during each calendar year, in the months of February, April, June, August and November. The annual meeting of the Society shall be held on or before the third Wednesday in April and shall precede the regular meeting scheduled for that month.
- 4. <u>Special Meetings</u>. Special meetings of the Board of Directors, for any purpose or purposes, may be called by the President, the Administrator, or by any seven (7) Directors upon petition to the Secretary. Such special meetings shall be held at such time and place as may be determined by such person or persons authorized to call the special meetings.
- 5. Notice of Special Meetings; Notice of Adjournment. Written notice of any special meeting of the Board of Directors stating the place, date, and hour of the meeting shall be mailed not less than ten (10) days before the date of the meeting to each Director, or delivered either personally, by email or by fax no less than two (2) days before the date of the meeting to each Director. The notice shall state that it is being issued by or at the direction of the person or persons calling the meeting and shall indicate the purpose or purposes for which the meeting is being called. The business of the Board of Directors at such special meetings shall be confined to those matters contained in such notice. Notice of any adjourned meeting of the Board of Directors specifying the time and place of the next meeting shall be given to the Directors who were not present at the time of the adjournment, and unless such time and place are announced at the original meeting, to the other Directors who were present thereat. The attendance of a Director at any special meeting, without protesting prior thereto or at its commencement the lack of notice to her or him, shall constitute a waiver of notice of such meeting.

6. Notice; Participation; Quorum; Manner of Acting. Fifty percent of the entire Board of Directors shall constitute a quorum for the transaction of any business at any meeting of the Board. The vote of a majority of the Board of Directors present at the time of the vote, if a quorum is present at such time, shall constitute the lawful act of the Board of Directors, provided that Directors who are present at a meeting but not present at the time of a vote due to a conflict of interest or related party transaction shall be determined to be present at the time of the vote for purposes of this paragraph. The Directors present at a meeting of the Board may adjourn the meeting despite the absence of a quorum.

Notice of each meeting shall be by telefax, by email, or by any written communication, but no notice shall be required in the case of any Director who waives the same or attends the meeting, without protesting prior thereto or at its commencement the lack of notice to her or him. If such notice is served personally or by email or telefax, it must be so served not less than two days prior to the meeting; and if mailed, it must be mailed not less than five days prior to the meeting.

Any one or more members of the Board or any committee thereof may participate in a meeting of such Board or committee by means of a conference telephone, video conference, or similar communications equipment allowing all persons participating in the meeting to hear each other at the same time. Participation by such means shall constitute presence in person at a meeting, and the Society shall facilitate the technology for such participation.

7. Written Consent of Directors. Notwithstanding any other provision of these Bylaws, any action required or permitted to be taken by the Board of Directors or any committee thereof may be taken without a meeting if all members of the Board or of the committee consent to the adoption of the resolution authorizing the action. Such consent may be written or electronic. If the consent is written, it must be signed by the director. If the consent is electronic, it must be able to be reasonably determined to have been sent by the board member. The resolution and the written consent thereto by the members of the Board or committee shall be filed with the minutes of the proceedings of the Board or committee.

- 8. <u>Annual Report</u>. The Board of Directors shall cause to be published and submitted to the Member at the annual meeting of the Member, or as soon thereafter as is practicable, a report, verified by the President and Treasurer or by a majority of the Directors, or certified by an independent public or certified public accountant, or a firm of such accountants selected by the Board, which report shall evidence the financial condition of the Society in the appropriate detail as required by the Not-for-Profit Corporation Law. The annual report of Directors shall be filed with the records of the Society and a copy shall be entered in the minutes of the proceedings of the annual meeting of members.
- 9. <u>Conduct and Decorum of Directors</u>. All Directors are to carry out their responsibilities in good faith and with the care an ordinarily prudent person in a like position would exercise under similar circumstances. The failure of a Director to carry out his or her responsibilities with such good faith and care shall be among the grounds for such Director to be removed for cause pursuant to the provisions of Paragraph 2(b) of this Article.
- 10. The majority of the Board's members shall be attorneys engaged in the practice of law who are not judges. No member of the Board shall hold a position in law enforcement, or as a prosecutor of criminal matters. Nor shall any member serve as a full-time government official; provided, however, that judges, as well as attorneys serving as administrative law judges, support magistrates and similar quasi-judicial capacities, shall not be disqualified from membership on that basis. No member of the Board may be an employee of the Society.
- 11. Compensation. No compensation of any kind shall be paid to any Director for the performance of his or her duties as Director. Subject to the Society's Conflicts of Interest Policy, provided that there is full disclosure of the terms of such compensation and the arrangement has been determined to be fair and reasonable and approved by the Audit committee, this shall not in any way (a) limit reimbursement for expenses necessarily incurred in effecting one or more of the corporate purposes of the Society or payment for services provided to the Society by the Director in any capacity separate from his or her responsibilities as a Director or (b) by any organization with which a Director is affiliated.

Article V

Officers

- 1. <u>Classification of Officers</u>. The Society shall have such officers as the Board of Directors may elect, which shall include a President, a Vice-President, a Secretary and a Treasurer, and such other officers as may be deemed appropriate by the Board of Directors. The officers shall also include a President-Elect, a Vice-President-Elect, a Secretary-Elect, and a Treasurer-Elect, who each shall serve in those capacities until the next annual election of officers, at which time they shall automatically assume the offices of President, Vice-President, Secretary, and Treasurer, respectively. The officers shall also include an Administrator, who shall be appointed as provided in these Bylaws. Except for the Administrator, no officer of the Society shall be an employee of the Society.
- 2. <u>Election and Term of Office</u>. The President-Elect, Vice-President-Elect, Secretary-Elect, and Treasurer-Elect shall be elected annually by the Board of Directors at the earliest moment following April 1st of each year and each for a term of one (1) year, to expire at the time of the annual election of officers. In the event other positions are subsequently established, then the Board shall elect officers and thereby fill such positions at any meeting of the Board. Each officer shall hold office until the expiration of the term for which he or she is elected and until his or her successor has been elected and properly qualified. The term of each office shall expire at the time of the annual election of officers.
- 3. <u>Vacancies, Resignation of Officers</u>. In the event a vacancy occurs in any office for any reason, the Board of Directors shall elect a succeeding officer and thereby fill the office for the remaining unexpired term. Any officer may resign at any time. Such resignation shall be made in writing and shall take effect at the time specified therein, and if the time is not specified, at the time of its presentation to the Board of Directors.

- 4. <u>President</u>. The President, who shall be chosen from among the Directors, shall preside at all meetings of the Board of Directors. The President shall work with the Administrator in the supervision and control of the business and affairs of the Society and shall perform such other duties as may be properly required by the Board of Directors.
- 5. <u>Vice-President</u>. The Vice-President or, if more than one, the Vice Presidents in the order determined by the Board, in the absence or incapacity of the President, shall perform the duties and exercise the powers of the President. The Vice-President shall have such powers and perform such duties as the President or the Board of Directors may from time to time prescribe.
- 6. <u>Secretary</u>. The Secretary shall keep the minutes of the Society, and shall perform the other duties customarily performed by the Secretary of a corporation, or such other duties as the President or the Board of Directors may from time to time prescribe.
- 7. <u>Treasurer</u>. The Treasurer shall maintain the financial records of the Society and shall perform the other duties customarily performed by the Treasurer of a corporation, or such other duties as the President or the Board of Directors may from time to time prescribe.

8. Administrator.

(a) The Board shall appoint an Administrator to implement the policies and duties of the Society. The Administrator shall be an attorney licensed in the State of New York who possesses administrative experience and skill in the representation of criminal defendants and/or adults in family law matters and who demonstrates integrity and a commitment to quality representation of public defense clients. The Administrator will serve for a five-year term, subject to subsequent re-appointment by the Board for successive terms of three years each and there shall be no set limit to the number of terms which may be served. The Administrator may be dismissed prior to the expiration of his or her term only for good cause following a hearing by the affirmative

vote of a majority of those Directors present at such duly constituted hearing at a meeting of the Board. There must be a minimum of 10 days prior written notice to the Board and the Administrator of such a meeting, which shall specifically refer to the proposed action of dismissal.

(b) At least six months prior the expiration of any term or contract of the Administrator (i) the Board shall give notice to the Administrator if the Board does not intend to renew the then-existing term or contract and (ii) the Administrator shall give notice to the Board of her/his intention to seek, or not to seek, a renewal of her/his term. If the Board gives notices that it does not intend to renew the then-existing term/contract, or if an Administrator indicates that s/he will not seek an extension of her/his term, then a new search committee shall be formed immediately and a new search begun.

ARTICLE VI

Committees

- 1. <u>Committees of the Board</u>. There shall be an Executive Committee, an Audit Committee and a Nominating Committee. The Board of Directors, by resolution adopted by a majority of those Directors present at a duly constituted meeting of the Board may designate such other board committees as it requires, each consisting of three or more Directors. Each such other board committee shall serve at the pleasure of the Board. The necessary notice of meetings of each such board committee, and procedure thereat, shall be in accordance with the resolution appointing the same or, if not so provided, as determined by each such committee itself.
- Executive Committee. The Executive Committee shall consist of the officers other than
 the Administrator, shall be chaired by the President, and shall have all the power and authority of the
 Board between meetings of the Board except as prohibited by law.
 - 3. <u>Nominating Committee</u>. The Nominating Committee shall consist of no fewer than five (5) members of the Board. The Nominating Committee shall present to the Board of Directors on an annual basis a slate of individuals which it proposes be appointed to the Board. The Board of

Directors shall act on the proposal and thereafter present to the Member a slate of individuals which it proposes be appointed to the Board pursuant to Paragraph 2(a)(ix) of Article IV of these Bylaws.

- Audit Committee. The Audit Committee shall be comprised solely of independent directors, as defined by applicable law, and shall have the responsibilities and authority as set forth in the Board's Audit Committee Charter and applicable law.
- 4. <u>Committees of the corporation</u>. The President, subject to the approval of the Board, may otherwise designate such committees of the corporation as it may require, which may consist of persons who are not Directors. Each such committee of the corporation shall serve at the pleasure of the Board and may not bind the Board. The necessary notice of meetings of each such committee, and procedure thereat, shall be in accordance with the committee charter or other resolution appointing the same or, if not so provided, as determined by each such committee itself.
- 5. <u>Administrator</u>. The Administrator shall serve on all committees of the corporation unless specifically provided otherwise by resolution of the Board.

ARTICLE VII

<u>Amendment</u>

1. <u>Amendment</u>. The Member has full authority to amend these Bylaws by majority vote of its own Board of Directors. In addition, except to the extent that such amendments remove or decrease the power or authority of the Member, these By-Laws and any hereafter adopted may be amended by the majority of the votes cast at a duly constituted meeting of the Board of Directors of the Society, upon ten (10) days written notice of such amendment(s) to both the Member and the Board of Directors.

ERIE COUNTY ASSIGNED COUNSEL PROGRAM ELIGIBILTY DETERMINATION **PROTOCOLS AND** SUPPORTING **DOCUMENTS**





Assigned Counsel Program

Michelle Parker, Executive Director/Chief Defender

The Brisbane Building 403 Main Street, Suite 215 Buffalo, NY 14203 Phone (716) 856-8804 Fax (716) 856-0424

ERIE COUNTY ASSIGNED COUNSEL PROGRAM CLIENT ELIGIBILITY DETERMINATION PROTOCOLS

Pursuant to the New York State Office of Indigent Legal Services (ILS) Guidelines, only those clients who qualify as "indigent" may receive provision of mandated representation past the arraignment stage.

The Erie County Assigned Counsel Program abides, in all respects, by the "Standards for Determining Financial Eligibility for Assigned Counsel" promulgated in February 2021. That document follows this memorandum.

Criminal panel attorneys are required to complete a "Confidential Report of Financial Status (CRFS)" for each client they represent. This document is completed at a panel attorney's initial contact with the client, whether that be during a pre-arraignment meeting (for pre-arraignment assignments) or at arraignment (for Counsel at First Appearance "CAFA" arraignments). The CRFS utilized by the Erie County Assigned Counsel Program is modeled on the document suggested by ILS and follows this memorandum.

Following completion of the CRFS, the document is uploaded into our Defender Data 7 (DD7) database where it is reviewed by a dedicated staffer tasked with eligibility determinations.

Determinations are made expeditiously. The information provided by the clients is compared with the ILS Guidelines for indigency to determine eligibility.

Should a client fail to qualify, the client and the panel attorney are notified in writing of said determination. Representation ceases immediately and the client is informed that he/she must retain counsel. The client is informed that he/she may appeal the decision denying representation to the First Deputy Defender. This information is also communicated to the Court of record.

If the client appeals, the First Deputy Defender conducts the appeal pursuant to the ILS Guidelines. If the client's appeal is unsuccessful, no further representation is provided. If the client's appeal is successful, counsel is provided, the attorney re-assigned and the court notified.

Standards for Determining Financial Eligibility for Assigned Counsel

Blackletter

February 16, 2021



STANDARDS FOR DETERMINING ASSIGNED COUNSEL ELIGIBILITY

- I. An applicant shall be eligible for assignment of counsel when the applicant's current available resources are insufficient to pay for a qualified attorney, release on bond, the expenses necessary for effective representation, and the reasonable living expenses of the applicant and any dependents.
 - A. Whether an applicant is eligible for assignment of counsel shall be determined in accordance with the Standards set forth below.
 - B. Counsel shall be assigned unless the applicant is conclusively ineligible.
- II. To streamline the eligibility determination process, there shall be presumptions of eligibility. A presumption of eligibility is rebuttable only where there is compelling evidence that the applicant has the financial resources sufficient to pay for a qualified attorney and the other expenses necessary for effective representation.
 - A. Applicants are presumptively eligible for assignment of counsel if their net income is at or below 250% of the Federal Poverty Guidelines.
 - B. Applicants who are incarcerated, detained, or confined to a mental health institution shall be presumed eligible for assignment of counsel.
 - C. Applicants who are currently receiving, or have recently been deemed eligible pending receipt of, need-based public assistance, including but not limited to Family Assistance (TANF), Safety Net Assistance (SNA), Supplemental Nutrition Assistance (SNAP), Supplemental Security Income (SSI)/New York State Supplemental Program (SSP), Medicaid, or Public Housing assistance, shall be deemed presumptively eligible for assignment of counsel.
 - D. Applicants who have, within the past six months, been deemed eligible for assignment of counsel in another case in that jurisdiction or another jurisdiction shall be presumed eligible. Appellate courts shall assign appellate counsel to appellants who were deemed eligible for assigned counsel by their trial court.
 - III. Counsel shall be assigned at the first court appearance or be provided immediately following the request for counsel, whichever is earlier. Eligibility determinations shall be done in a timely fashion so that representation by counsel is not delayed.

- A. Counsel shall be provided for applicants whenever they have not obtained counsel prior to a proceeding which may result in their detention or whenever there is an unavoidable delay in the eligibility determination, subject to judicial approval once the court proceeding has begun.
- B. Where a petition or pre-petition request has been filed under Family Court Act Article 10 for an order for immediate removal of a child or temporary order of protection, a person who is a parent or legally responsible person, as defined by law, shall be entitled to immediate representation by counsel. In accordance with this entitlement, counsel shall also be provided for parents in child welfare proceedings during a child protective agency investigation and sufficiently in advance of their first court appearance, consistent with (A) above. As with subsection (A), this provision of counsel may be subject to judicial review once a court proceeding is commenced.
- Ability to post bond shall not be sufficient, standing alone, to deny eligibility for assignment of counsel.
- V. The resources of a third party shall not be considered available to the applicant unless the third party expressly states a present intention to pay for counsel, the applicant gives informed consent to this arrangement, and the arrangement does not interfere with the representation of the applicant or jeopardize the confidentiality of the attorney-client relationship.
 - A. The resources of a spouse shall not be considered available to the applicant, subject to the above exception.
 - B. The resources of a parent shall not be considered as available to minor applicants, subject to the above exception.
- VI. Non-liquid assets shall not be considered unless such assets have demonstrable monetary value and are readily convertible to cash without impairing applicants' ability to provide for the reasonable living expenses of themselves and their dependents.
 - A. Ownership of a vehicle shall not be considered where such vehicle is necessary for basic life activities.
 - B. An applicant's primary residence shall not be considered unless the fair market value of the home is significant, there is substantial equity in the home, and the applicant is able to access the equity in a time frame sufficient to retain private counsel promptly.

- VII. Any income from receipt of child support or need-based public assistance shall not be considered as available to applicants in determining eligibility for assignment of counsel.
- VIII. Debts and other financial obligations, including the obligation to provide reasonable living expenses of the applicant and his or her dependents, shall be considered in determining eligibility for assignment of counsel.
- IX. Eligibility determinations shall take into account the actual cost of retaining a private attorney in the relevant jurisdiction for the type of family court proceeding or category of crime charged.
- X. These Standards shall be applied uniformly, consistently, and with transparency.
- XI. Courts have the ultimate authority to determine eligibility but may delegate the responsibility for screening and making an eligibility recommendation.
 - A. Entities responsible for screening and making a recommendation should be independent and conflict-free.
 - B. Where there is no entity that is independent and conflict-free, courts may delegate the screening responsibility to the provider of mandated representation.
- XII. The confidentiality of all information applicants provide during the eligibility determination process shall be preserved.
 - A. The eligibility screening process, whether done by another entity or the court, shall be done in a confidential setting and not in open court.
 - B. Any entity involved in screening shall not make any information disclosed by applicants available to the public or other entities (except the court).
 - C. Any documentation submitted to the court shall be submitted ex parte and shall be ordered sealed from public view.
- XIII. The eligibility determination process shall not be unduly burdensome or onerous.

- A. Applicants shall not be required to attest under penalty of perjury to the truth of the information provided as part of the eligibility determination process.
- B. Applicants shall not be denied assignment of counsel for minor or inadvertent errors in the information disclosed during the eligibility determination process.
- C. Applicants shall not be required to produce unduly burdensome documentation to verify the financial information provided; nor shall they be denied assignment of counsel solely for the failure to produce documentation where they have demonstrated a good faith effort to produce requested documentation.
- D. Applicants shall not be required to demonstrate that they were unable to retain private counsel to be deemed eligible for assignment of counsel.
- XIV. The determination that applicants are ineligible for assignment of counsel shall be in writing and shall explain the reasons for the ineligibility determination. Applicants shall be provided an opportunity to request reconsideration of this determination or appeal it, or both.
 - A. Screening entities shall promptly inform applicants of their eligibility recommendation. If their recommendation is that the applicant be denied assignment of counsel, they shall provide the reason for the denial in writing along with written notice that the applicant can ask the screening entity to reconsider or can appeal to the court, or both.
 - B. If a court determines that an applicant is ineligible for assignment of counsel, the court shall inform the applicant of this decision in writing with an explanation as to the reason for the denial. The court shall also entertain an applicant's request to reconsider a decision that the applicant is ineligible for assignment of counsel.
- XV. A determination that a person is eligible for assignment of counsel may be reexamined only in accordance with County Law §722-d, which shall only be used after an assignment of counsel has been made, and only if prompted by assigned counsel as therein provided. Counsel shall not be assigned contingent upon a requirement that the person make partial payments to the provider of mandated representation or to the county.

XVI. Procedure regarding data maintenance

- A. Data shall be maintained regarding the:
 - i) number of applicants who apply for assignment of counsel;
 - ii) number of applicants found eligible;
 - iii) number of applicants found ineligible and the reasons for the ineligibility determination;
 - iv) number of reconsiderations and appeals requested;
 - v) results of these reconsiderations and appeals;
 - vi) number of reports made pursuant to County Law § 722-d regarding the assignment of counsel; and
 - vii) number of orders issued for partial payment or termination of the assignment of counsel under County Law § 722-d.
- B. To ensure the confidentiality of information submitted during the eligibility determination process, the data shall be made available in aggregate form only, meaning that no individual applicant can be identified in the data itself.



ASSIGNED COUNSEL PROGRAM

THIS FORM MUST BE SCANNED AND UPLOADED TO DD7 NO LATER THAN 2 WEEKS AFTER ASSIGNMENT AND BEFORE VOUCHING FOR THIS CASE.

CONFIDENTIAL REPORT OF FINANCIAL STATUS PRIVILEGED CLIENT INFORMATION

CLIENT:	DATE OF BIRTH:						
AKA:	COURT:						
ADDRESS:	CASE NUMBER:						
	ATTORNEY:						
PHONE:							
E-MAIL:	#OF DEPENDANTS:						
PRESUMPTIVE E	LIGIBILITY						
IS THE APPLICANT CURRENTLY INCARCERATED, DETAINED OR CONFINED TO A MENTAL HEALTH FACILITY?	☐ YE	S 🔲 NO					
IS THE APPLICANT CURRENTLY RECEIVING OR ELIGIBLE FOR NEED-BASED PUBLIC ASSISTANCE (FOOD STAMPS, TANF, SSI/SSP, SNA, MEDICAID, SECTION 8, EMERGENCY ASSISTAN		S 🗆 NO					
TO THE APPLICANT'S KNOWLEDGE, HAVE THEY BEEN DEEMED ELIGIBLE FOR ASSIGNED COUNSEL IN THE LAST SIX MONTHS?	☐ YE	S ∏NO					

IF THE ANSWER TO ANY OF THE QUESTIONS ABOVE IS "YES" STOP NO FURTHER INQUIRY IS REQUIRED.

IF NONE ARE "YES," PROCEED TO REVERSE SIDE

TAXES	AMOUNT					
EMPLOYMENT NET						
UNEMPLOYMENT NET						
DISABILITY NET						
WORKERS COMP NET						
SOCIAL SECURITY NET						
PENSION						
RENTAL INCOME						
TOTAL INCOME						
ASSETS	AMOUNT	1				
BANK ACCOUNTS TOTAL	AMOUNT	-				
CASH ON HAND		-				
		-				
OTHER LIQUID ASSETS TOTAL ASSETS						
		_	YES	□NO		
OO YOU OWN A CAR?						
S THE CAR NECESSARY FOR BAS F "YES," VALUE OF CAR CANNOT BE	E INCLUDED IN ASSE	S? \[\] Y	YES	□ NO	E. ¢	
S THE CAR NECESSARY FOR BAS F "YES," VALUE OF CAR CANNOT BE F "NO" WHAT IS CAR'S VALUE?	E INCLUDED IN ASSE	S? \[\] Y		□ NO TH CAR VALU	E: \$	
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OBLIGATIONS PER MONTH FOOD EXPENSES RENT/MORTGAGE UTILITIES (GAS, ELECTRIC,	E INCLUDED IN ASSE	S? \[\] Y			E: \$	
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ERIE COUNTY ASSIGNED COUNSEL PROGRAM COMBINED STATEMENT OF GOVERNMENT CONTRACTS AND PRIVATE DONATIONSFOR 2022, 2023 AND 2024



ASSIGNED COUNSEL PROGRAM FUNDING(REVENUE) SOURCES 2022, 2023 and 1st half 2024

Government Funds	Type of Funding		2022	2023		1st half 2024	
							***See below for actual
Erie County	18B funding contract	\$	9,169,256.00	\$ 17,581,238.00	\$	10,161,216.50	funding cost to County
NYS/ILS	Various Distributions/Competitive Grants	\$	5,419,500.09	\$ 6,732,562.36	\$	5,334,105.19	
NYS/DCJS	ATD	\$	130,605.00	\$ 104,484.00			
NYS/DCJS	Securing Communities Against Hate Crimes		\$ 8,362.00				
	Grant				\$	25,158.40	
Niagara Cty	Contract with county for Social Worker (3 yrs 9/	\$	27,500.01	\$ 110,825.04	\$	56,650.00	
Redlich Horwitz Foundation	Family Court - Prepetition 3 yr contract			\$ 150,000.00	\$	75,000.00	
	Restricted Training/Restricted Atty						
Private Donations	Event/Unrestricted Mintz Memorial	\$	30,350.00	\$ 9,670.00	\$	5,233.00	
		\$	14,777,211.10	\$ 24,697,141.40	\$	15,657,363.09	_



***Erie County 18-B funding contract

Unused funds get paid back to County after completion on the						ount to Payback (these approximate/before	Revenue Rec'd from NYS for 50% share of 18B atty rate			
Independent Audit	Contracted Amount		Am	ount Expensed	Final Audit complete		Final Audit complete increase		Actual Cost to County	
2022	\$	9,169,256.00	\$	9,189,419.98	\$		\$		\$	9,189,419.98
2023	\$	17,581,238.00	\$	14,321,663.75	\$	3,259,574.25	\$	1,265,269.05	\$	13,056,394.70
2024 (1st half)	\$	10,161,216.50	\$	8,770,955.06	\$	1,390,261.44	\$	2,331,255.30	\$	6,439,699.76 1/2 y