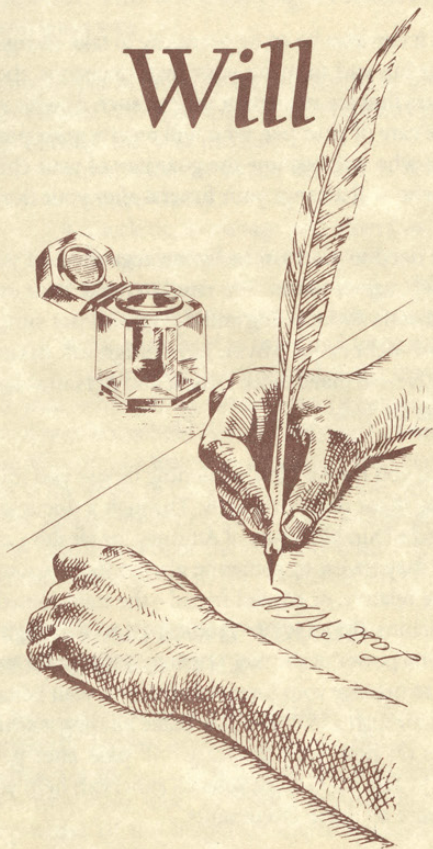


Making Your Will



AIDS LEGAL REFERRAL PANEL
(415) 864-8186

A Legal Service for Persons with AIDS and ARC

TAKING CARE OF YOUR LEGAL AFFAIRS

A diagnosis of AIDS or ARC is a shattering experience for anyone. It changes your life—makes you ask questions you've never asked. And it forces you to pay attention to matters you may have taken for granted or simply avoided: matters like your health, relationships, living situation, or what happens when you die.

But it can also be an opportunity to take charge of your life and to make your own decisions about issues that are important to you, such as who will take care of your pet, who will receive your property, who will become the guardian of your child, or who will arrange your funeral after your death.

You need to plan for the future, regardless of your health, age or assets. You need to make your own decisions about living and dying, and not simply allow others—a physician, judge, or distant relative—to make these critical and personal decisions for you.

But if you have a life-threatening illness you must make these decisions early. Through a document called a Durable Power of Attorney for Health Care, you may invest in someone else—a lover, spouse, close relative, or trusted friend—the right to make decisions about your medical care. Through a general power of attorney you may authorize someone to manage your financial affairs on your behalf. And through a Will you may make binding instructions on how your property will pass after your death. The AIDS Legal Referral Panel can help you prepare all these documents.

WHAT IS A WILL?

A Will is a legal document that governs how your property and assets will be distributed at your death. An AIDS Legal Referral Panel attorney can work with you on setting up a simple Will, that is, a Will without trust provisions. The attorney will draft a formal document that sets out your specific instructions on how you wish your property to be distributed. This Will is then signed before two or more witnesses.

Certain types of property are distributed by means other than a Will. Examples of such property passing "outside" the Will include:

- real estate in which the title is held in joint tenancy;
- checking, brokerage, and other financial accounts held in joint tenancy;
- life insurance proceeds when a charity or person is named as a beneficiary; or
- property held in trust, including simple savings bank trusts and living trusts.

All your other assets—from your personal bank account to household items to real estate owned by you alone or as a tenant-in-common—pass according to the terms of your Will. In addition, you can leave valuable instructions in your Will regarding your funeral, burial or cremation, or regarding your selection of a guardian for your children.

WHAT HAPPENS IF YOU DO NOT MAKE A WILL?

If you die without a valid California Will, your property passes according to a complex legal scheme to spouses, children, or blood or adopted relatives. Your lover or friend receives nothing, regardless of the length or importance of your relationship. Nor will any of your money or property go to your favorite charity, even if you told your friends and family that you wanted your money to help fund a particular nonprofit service. Finally, if you die without a Will and no close relative can be found to inherit your property, it will pass to the State of California.

CAN YOUR WILL BE CHALLENGED?

You may be concerned that your family will try to set aside your Will. If you are 18 years old or older and have the mental capacity to make a Will, your Will should be recognized as valid. "Mental capacity" to make a Will is a legal standard that is impossible to define with certainty, but generally means that:

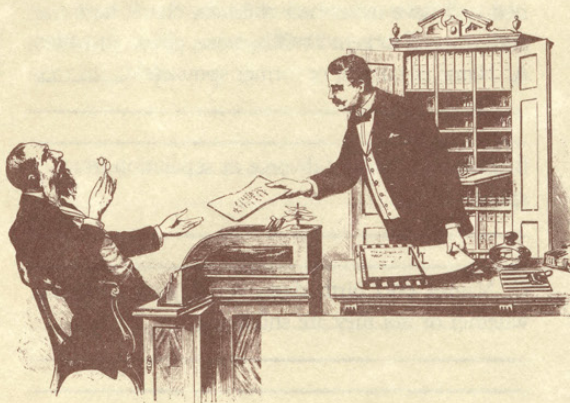
- 1) You are aware of the kind of property you own and where the property is located;
- 2) You are aware of the existence of your family members, spouse, or children and that they are the persons who would usually receive your assets (whether or not you finally decide to name them in your Will); and
- 3) You understand what property you want to give to whom.

If someone deprives you of your free will by unduly influencing you or misleading you into disposing of your property in a way you would not otherwise have done, all or part of your Will may be held invalid. One reason to execute a formal Will is the presence of witnesses who can later testify to your mental capacity and to the lack of undue influence.

You can avoid claims of "undue influence" or "lack of mental capacity" if you make your Will as soon as possible while you are reasonably healthy. Your health may rapidly change, and legal challenges to Wills are often made on the basis that the Will-maker was too weak to know what he or she was doing.

HELPING YOU MAKE YOUR WILL

If you are a person with AIDS or ARC, contact the AIDS Legal Referral Panel during business hours. The Panel will arrange for one of its volunteer attorneys to draft your simple Will or Durable Power of Attorney. *No fees are charged for these basic legal services.* If you are unable to make an office visit, a Panel attorney will come to your home or hospital room.



To assist the attorney in her or his drafting of your Will, please answer the following questions before your meeting. If you do not understand a particular question, ask your attorney. He or she will answer any question you may have about your Will.

1) NAME: _____

2) ADDRESS: _____

3) HOME TELEPHONE: _____

WORK TELEPHONE: _____

4) **FAMILY SITUATION:** If you have never been married and have never had children, check here ☐ and proceed to item D. Otherwise, please provide:

A. Name of current or former spouse(s): _____

B. Date and place of divorce or separation from spouse:

C. Names and birth dates of all your children, whether or not they are still living:

D. Names of parents, whether or not they are still living: _____

E. Names of brothers and sisters, whether or not they are still living _____

5) **ALTERNATE FAMILY SITUATION:** If you have a companion or lover, please state his or her name

Do you have an agreement or contract with that person about the ownership or disposition of your property? If yes, please bring the agreement with you to the interview.

6) **YOUR PROPERTY:** Please list all your assets, including real estate, interest in a business or professional practice, bank accounts, stocks or bonds, cars, jewelry, clothing, artwork, furniture, etc. Please number each item.

7) **PROPERTY DISPOSITION:** You may leave all your property to one or more persons and/or charities, or leave particular pieces of property or specific amounts of money to specific people. In any case, please consider where your property should go if the person you intended to receive the item should die before you. Your "first choice" is called the **intended beneficiary** and your "second choice" is called the **successor or contingent beneficiary**.

Using the same numbering system you used in #6 above, please list your intended and successor beneficiaries for each item listed in #6. If you wish to leave all your property to one person or charity, please so state and also list the successor beneficiary.

8) **RESIDUARY BENEFICIARY:** This is a person or charity who receives any of your money or property not specifically distributed in your Will, which you forgot to include in your Will, or which you acquire after you have executed the Will. This person also receives gifts to others which fail because the named beneficiary or beneficiaries die before you. Please list your intended and successor residuary beneficiaries here:

9) **OTHER PROPERTY:** Please list:

A. All life insurance policies you hold and who is currently listed as the beneficiary:

B. Any retirement or similar benefits you have and who are the named beneficiaries:

C. Property, bank accounts or other assets owned with another person:

10) **EXECUTOR:** This person will be responsible for paying your debts from your estate, for managing your property during the probate of your estate, and for distributing your property. You may name as executor any person over the age of 18 years who is a United States resident and legally competent. You may also name someone who is a beneficiary under your Will. Please list here the person or persons you wish to become Executor(s) of your Will, along with alternate Executor(s) in case your first choice is unable or unwilling to serve:

11) **FUNERAL INSTRUCTIONS:** Please check your specific wishes:

☐ Burial, or ☐ Cremation

Funeral or memorial service?

☐ Yes ☐ No

Special instructions: _____

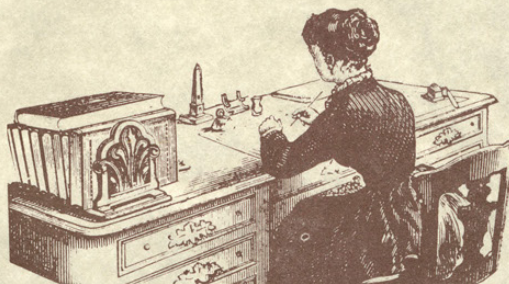
Do you want your Executor to publish an obituary?

☐ Yes ☐ No

Special instructions for obituary: _____

12) **OTHER INFORMATION:** Please note any other information useful in preparing your Will, or list any questions you have:

DATE _____ SIGNATURE _____



Please bring this Will Information Booklet with you when you meet with your attorney to prepare your Will.

If you later decide to change your Will, you may either execute an entirely new Will or merely execute a "Codicil" which changes only part of your Will. The AIDS Legal Referral Panel is available to assist you in making changes to your original Will.

The AIDS Legal Referral Panel can also help you execute a Durable Power of Attorney for Health Care, other medical directives, and a financial power of attorney—all at no charge. In addition, the AIDS Panel provides assistance on other legal matters to Persons with AIDS and ARC.

For more information, call:

**AIDS Legal Referral Panel
(415) 864-8186**

**25 Hickory Street
San Francisco, California 94102**

The AIDS Legal Referral Panel is a project of Bay Area Lawyers for Individual Freedom (B.A.L.I.F.), National Educational Foundation for Individual Rights (N.E.F.I.R.), and Volunteer Legal Services Program of the Bar Association of San Francisco (V.L.S.P./B.A.S.F.). The Panel's 1988 operations are funded by the San Francisco Foundation, Van Loben Sels Foundation, James Irvine Foundation, and Walter and Elise Haas Fund, as well as from numerous contributions by Bay Area attorneys and law firms. This brochure is made possible through grants by L.J. and Mary C. Skaggs Foundation and the GGBA Foundation.

AIDS LEGAL REFERRAL PANEL

1987 ANNUAL REPORT

The AIDS Legal Referral Panel is a project of Bay Area Lawyers for Individual Freedom (BALIF), National Educational Foundation for Individual Rights (NEFIR), and Volunteer Legal Services Program of the Bar Association of San Francisco (VLSP/BASF). This report was prepared by Clint Hockenberry, Rena Frantz, and Kathleen Quenneville.

1987 ANNUAL REPORT

AIDS Legal Referral Panel

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During 1987, as new AIDS and ARC cases threatened to outstrip the ability of many municipal agencies and volunteer organizations to respond to the heightened demand for essential services, the AIDS Legal Referral Panel helped 300 more clients than it had served in 1986 while it simultaneously recruited 100 new attorneys onto the Panel.

The sometimes heroic efforts of Panel volunteers--from the attorney who forces an insurance company to reimburse her client for an AZT prescription to the law student who obtains social security benefits for his client to the notary public who rushes to a hospital room to notarize a general power of attorney--helped 1348 persons with AIDS and ARC during 1987, a 30% increase over the 1035 clients who were assisted in the previous year. Over 70% of the Panel's clients survive on social security, state disability, or general assistance, and approximately one in five are persons of color.

Roughly half the Panel's clients required a package of simple testamentary documents: wills, durable powers of attorney for health care, and general powers for financial matters. In preparing these testamentary documents, as well as by counseling and representing clients on a host of other legal matters, the AIDS Legal Referral Panel provided an estimated half million dollars worth of free legal services for Bay Area residents with AIDS and ARC during 1987.

As the largest AIDS legal services program in the country, with over 250 attorneys and legal professionals as volunteers, the Panel often is the first to notice legal trends. In July the Panel first reported that AIDS discrimination in the workplace around the Bay Area was *decreasing*. Several months later, insurance problems (often employment-related) were also declining. Most recently the Panel has seen a reduction in the number of housing discrimination complaints around the Bay Area.

But as one of the more established programs, the Panel is also assisting the creation of local AIDS legal services to help persons with AIDS and ARC outside the Bay Area. In 1987 and the beginning of 1988 the AIDS Legal Referral Panel helped establish groups in San Diego, Sacramento, and San Jose, and provided technical assistance to fledgling AIDS legal services in distant cities like Dallas, Nashville, Vancouver and West Berlin.

Because of the generous financial support of numerous foundations, law firms and individuals, the Panel was able to hire a second staff person to help administer the expanding program. The central office itself, after a warm relationship with the San Francisco Legal Aid Society, will soon relocate to larger space at the San Francisco AIDS Foundation.

But the unparalleled growth of the Panel is due in large part to a partnership created in 1986 with the Volunteer Legal Services Program of the Bar Association of San Francisco. Throughout 1987, with V.L.S.P.'s help and without any public funding, the AIDS Legal Referral Panel attracted new volunteer attorneys while it expanded free legal services to one of society's most needy groups---to persons with AIDS and ARC.

AIDS LEGAL REFERRAL PANEL

1987 ANNUAL REPORT

The AIDS Legal Referral Panel, a project of Bay Area Lawyers for Individual Freedom (B.A.L.I.F.), National Educational Foundation for Individual Rights (N.E.F.I.R.), and Volunteer Legal Services Program of the Bar Association of San Francisco (V.L.S.P./B.A.S.F.), served 1348 clients with AIDS and AIDS-Related Condition during 1987. Founded in 1983 to provide free and low cost legal services, the Panel has grown from a half dozen attorneys to over 250 attorneys, law students, paralegals, and notaries. Since its creation the Panel has assisted persons with AIDS and ARC, and those discriminated on a suspicion of having AIDS, on over 4000 different legal matters. The report that follows describes the kinds of cases handled by the AIDS Legal Referral Panel during 1987.

WILLS & POWERS OF ATTORNEY

Over half the AIDS Legal Referral Panel cases during 1987 involved assistance on testamentary documents, primarily simple wills, durable powers of attorney for health care, general powers of attorney for financial matters, and directives to physicians. Of the 1348 total cases for 1987, 653 clients required a package of simple testamentary documents while 38 required more complicated estate planning and probate assistance. Wills and powers of attorney remained the central component of the Panel's delivery of comprehensive legal services to persons with AIDS and ARC, a steady 51% of the Panel's total caseload for both 1986 and 1987.

The AIDS Legal Referral Panel provides a package of basic testamentary documents to all Persons with AIDS and ARC at *no* charge. The market value of these free services, based on average attorney time, is estimated at \$500 per package of testamentary documents. Therefore, during 1987 the AIDS Legal Referral Panel delivered \$325,000 *free* legal services for wills and durable powers of attorney alone. And equally important, as part of a Panel *wills-on-wheels* program, volunteer attorneys made home and hospital visits in cases of emergency.

Although an overwhelming majority of the Panel's wills and durable powers cases occur without incident, occasionally an attorney finds herself in the middle of a struggle between the client's nuclear family and the client's lover or spouse. Examples of cases during the year include:

- A sister of a dying patient, who was appointed attorney-in-fact under a two year old durable power of attorney for health care, barred the new lover from the hospital room. Only after the person with AIDS awakened and demanded the visit was the lover allowed to say goodbye to his companion.
- A San Francisco hospital prepared to ship the remains of a person with AIDS to his parent's family cemetery in the South in conflict with provisions in the testator's will and durable power of attorney for health care. Only when a Panel attorney intervened did the hospital allow the lover to take the body for cremation.
- A mother, arriving from out-of-state, discovered the attorney-in-fact under a general power was selling her son's household items and withdrawing money from her son's account in order to supply himself with drugs.
- Two sisters, arriving shortly after the intestate death of their brother, cleared out all the furnishings from the brother and lover's apartment, including items purchased jointly during their eight year relationship.

EMPLOYMENT DISCRIMINATION

AIDS employment discrimination in the San Francisco Bay Area is declining. Both in terms of the reported cases and the percentage of the AIDS Legal Referral Panel's monthly caseload, discrimination against employees with AIDS and ARC has taken a decided and dramatic downward turn.

During the first quarter of 1987 AIDS employment discrimination accounted for 10.6% of the Panel's total caseload. In contrast, over the last three quarters of 1987 AIDS employment discrimination accounted for only 3.4% of the overall cases. Although in 1987 the AIDS Legal Referral Panel experienced a 30% increase over its 1986 caseload, the actual number of employment discrimination cases remained constant at roughly 90 cases for each year.

Examples of AIDS Legal Referral Panel employment discriminations for 1987 include:

- An executive chef was terminated by a large restaurant in a rural California resort while he was recuperating in the hospital from a first bout of pneumocystis.
- A school administrator with pneumocystis was fired by the school because the employee was unable to work overtime.
- An overseas civilian employee of the Navy was terminated after testing positive to exposure to the AIDS virus.
- A waiter in a San Francisco restaurant was fired after his personal physician told his employer he had AIDS.
- A gay hairstylist, immediately after developing herpes zoster, was denied new clients because the shop's owner was afraid his customers would think the hairstylist had AIDS.
- A claims adjuster for large insurance company was subjected to harassment by a coworker who started to wear "protective hospital garb" into the business office after learning the woman lived with a person with AIDS.

Reasons for the decline in area-wide AIDS employment discrimination cases during the last three quarters of 1987 may be the generally rising numbers of employees with AIDS and ARC who continue to work, the deterrent effect of local antidiscrimination ordinances and aggressive enforcement of AIDS Panel attorneys, the attractive educational materials of AIDS in the Workplace project, the model guidelines of San Francisco's Chamber of Commerce, and recent court decisions that prohibit AIDS discrimination under handicap protections. Moreover, although reported cases of discrimination are declining, this decrease is occurring primarily in large and moderate-sized private companies. Small businesses, as well as employers outside the central Bay Area, nonetheless continue to discriminate against employees with AIDS and ARC at the same level.

INSURANCE

Like the declining rate of AIDS employment discrimination in the Bay Area, the number of insurance cases handled by the AIDS Legal Referral Panel is also dropping. From January to June 1987, the Panel worked on a total 55 insurance cases for an 8.1% share of its overall caseload, the same level as in the previous year. But during the second half of 1987, the Panel handled only 35 insurance cases for a 5.2% portion of its total caseload. The decrease, in part, reflects the fact that most

insurance cases (especially health insurance) continue to be employment-related where a personnel department can intervene with the carrier on behalf of the company worker. If there is a supportive work environment, problems with employee benefits are often resolved directly by the company.

Many of the 85 clients who contacted the Panel for assistance a year earlier during 1986 were finding their insurance claims denied on grounds of alleged pre-existing conditions. In contrast, these kinds of problems declined sharply during the latter part of 1987, suggesting consumers are not "shopping around" for the best policy, but simply retaining the insurance they have. A knotty problem surfaces, however, when an employer switches the company's group health coverage to a new insurance plan that contains a pre-existing condition provision.

The first half of 1987 showed a roller-coaster pattern of insurance cases that flattened out and decreased during the last half of the year. Examples from AIDS Legal Referral Panel insurance cases during 1987 include:

- Several months after his company switched health insurance coverage, a man newly diagnosed had his claims denied on grounds of a "preexisting condition."
- The wife and teenage children were each denied life insurance policies because they had resided with a man who had died from AIDS.
- A worker, after reducing his work hours to a parttime schedule because of AIDS, was denied longterm disability because that benefit was only for fulltime employees.
- A person with AIDS, after converting from a group to an individual policy pursuant to COBRA, found his monthly premiums increased from \$100 to \$600 with fewer benefits and a \$1000 deductible.

Unfortunately, because 85% of all health insurance is obtained through employment, there is no effective legal recourse against an insurer that fails to pay valid claims. A recent United States Supreme Court decision [*Pilot Life Insurance Co. v. Dedeaux*] held that a weak Federal law preempts stronger state causes of action against an insurance company that acts in bad faith. Although 90 Bay Area residents in 1987 needed assistance on insurance matters (from an insurance company's refusal to pay azidothymidine [AZT] as part of its prescription drugs coverage to a health insurer's failure to pay a claim on a biopsy of a kaposi sarcoma lesion on the grounds that this biopsy was "cosmetic surgery"), the AIDS Legal Referral Panel increasingly is unable to respond until the abuses of *Pilot Life* are corrected.

HOUSING

Although the actual number of housing cases for 1987 was 81, slightly up from the 72 housing cases of the year before, most of the complaints involved an inability of the tenant to pay his rent rather than an eviction because the tenant had AIDS. In the last half of 1987, for example, only two AIDS Legal Referral Panel cases involved allegations of AIDS discrimination in housing, a sharp decline from the first six months.

AIDS, however, can exacerbate problems that already exist. Potentially explosive domestic violence was present in nearly a quarter of the Panel's 1987 housing cases. Another common situation is a sick tenant whose health becomes worse because the landlord fails to repair broken plumbing, heating or other basic services.

Examples of the Panel's housing cases during 1987 include:

- A tenant with AIDS was without water for two months after a landlord ripped out a sink and plumbing from the unit.
- A resident of 28 days at a residential hotel was forced to vacate his room, then move back into the same unit on the next day.
- Two lovers with AIDS were forced to flee their own apartment and obtain a temporary restraining order against a roommate who had threatened to kill them.
- Owners of an apartment house fired and evicted the resident building manager shortly after they learned of his ARC diagnosis.
- A manager of a San Francisco residential hotel locked out a tenant with AIDS after she learned of his diagnosis.

Despite the fact that most housing cases involve landlord/tenant issues, approximately a fifth of the Panel's 1987 housing cases required legal assistance in real estate matters, primarily inter vivos transfers of title or tax advice. In at least one case, however, a Panel attorney unsuccessfully attempted to forestall a bank's foreclosure on a house where the person with AIDS had just recently died.

GOVERNMENT BENEFITS

Government benefits cases, primarily involving social security, state supplemental income, state disability, general assistance or medical payments, have been a central area in the Panel's delivery of comprehensive legal services to persons with AIDS and ARC. During the first half of 1987 the Panel served 25 clients on government benefits matters. Then in July the Panel initiated a special Social Security Project to assist clients at the reconsideration and appellate levels of their social security applications. During the Project's first month the volunteer director assisted 22 clients in applying for social security benefits--nearly as many clients as the Panel helped during the first half of 1987.

A majority of the Panel's government benefits cases for 1987 were social security denials for persons with an AIDS Related Condition (ARC). Although some of these clients were bedbound and clearly disabled, the Social Security Administration nevertheless determined they could secure gainful employment. After an administration appointee was quoted as saying: "These people may be dying, but they are not necessarily disabled," the Social Security Administration has been under intense pressure to modify its definition of AIDS to include previously designated AIDS-Related Conditions. But an entrenched and rigid system of disability classifications, as well as lengthy bureaucratic reviews, are particularly costly to individuals whose average life expectancy is 18 months after diagnosis with AIDS.

To assist agency and hospital social service departments, as well as applicants with AIDS and ARC themselves, the AIDS Legal Referral Panel released a manual titled: *The Social Security Disability Insurance Claims for AIDS and AIDS-Related Condition (ARC)*. Written by the Director of the Panel's Social Security Project, Patrick James, the book helps cut through the proverbial governmental "red tape" by ensuring all the necessary documentation is included at the time of filing.

By the end of 1987 the AIDS Legal Referral Panel had assisted 85 persons with AIDS or ARC at the reconsideration or appeals level of their social security application. The special project was restructured at the end of the year to expand the number of volunteers who could assist and represent applicants. By January 1988 the Panel had trained approximately 20 attorneys and legal professionals to assist clients in their social security applications.

BANKRUPTCY

Every person with AIDS experiences some degree of financial problems due to his or her catastrophic illness. Although some may continue to work fulltime schedules, frequently workers after diagnosis will reduce their workhours or go directly onto disability. A half year later they begin to receive social security benefits.

Prior to diagnosis persons with AIDS may have received \$30,000 or \$40,000 a year salaries and paid their bills promptly. But after diagnosis, receiving less than \$7,000 a year from Social Security, they find it increasingly difficult to make ends meet. They suddenly find themselves among the growing ranks of the *new poor*.

During 1987 73% of all AIDS Legal Referral Panel clients received social security or state disability payments. 5.7% of all Panel clients, or 77 persons with AIDS and ARC, experienced financial difficulties severe enough to warrant specific credit and bankruptcy counseling. But clients frequently receive financial counseling while attorneys are representing them on a different legal matter, such as a will or a government benefits problem. And often financial insecurity contributes to clients' general feelings of anxiety and depression.

CRIMINAL

Criminal cases are a small but constant percentage of the AIDS Legal Referral Panel's caseload. 57 clients with criminal problems, or 4.3% of the total yearly caseload, requested legal assistance from the AIDS Panel during 1987.

The kinds of cases within this category included shoplifting, hit-and-runs, drinking while intoxicated, embezzlement, vandalism, assault with a deadly weapon, and attempted murder. In addition, many of the AIDS Panel's criminal cases were alcohol- or drug-related. For example:

- On the day he was diagnosed, a person with AIDS was arrested for driving while intoxicated and spent that first night after diagnosis in the county jail.
- An intoxicated person with ARC was arrested for breaking and entering after blacking out in the store he was robbing.
- A coke addict shot and wounded a police officer after a high speed chase in a stolen vehicle.
- Two lovers, one with AIDS and the other with ARC, unsuccessfully attempted suicide by heroin overdose--only to be charged with illegal possession of narcotics.

Because attorneys are not covered under the Panel's own liability coverage for criminal cases, individual attorneys who accept criminal cases must carry their own malpractice insurance. Recently the AIDS Legal Referral Panel has enlisted the support of public defenders in San Francisco, Alameda and Santa Clara counties to work on Panel criminal cases.

HEALTH CARE

Health care cases, either alleging medical malpractice or involving breaches of patient confidentiality and privacy, were a slowly rising percentage of the AIDS Legal Referral Panel's monthly caseload. The numbers of cases, though small, increased steadily from two cases in January to eight cases in December. The 1987 total for medical malpractice and patient confidentiality cases was 54, or 4% of the Panel's yearly caseload.

1987 health care cases ranged from the frivolous to the serious: from an intravenous drug user wanting to sue his physician for tapering him off his addictive seizure medication to the patient who received the wrong laboratory results only to learn after he quit his job that he did not have AIDS. Examples of other cases involving the health care provider/patient relationship included:

- An orthopedic surgeon improperly disclosed a patient's HIV seropositivity in a worker's compensation medical report that was read by an estimated 40 people.
- An individual thought he had tested seropositive to the AIDS virus, only later to learn that another man's results had mistakenly been sent to him inside a certified envelope that was addressed to him.
- The chief orthopedic surgeon at a local hospital refused to operate on a bed-bound patient after she learned of the patient's AIDS diagnosis.
- When a physician asked a patient if he were gay, and the patient replied he was, the gastroenterologist then refused to examine the patient, saying he wanted to keep a "nice safe practice of little old ladies."
- A dentist refused to continue treatment of a patient after she learned he was seropositive to the AIDS virus.
- A chiropractor routinely ordered an HIV test as part of the general bloodwork for all his patients without his patients' knowledge or consent.
- A surgeon at a rural California community hospital who ordered an HIV test without the patient's knowledge or consent, then refused to operate, claiming only a San Francisco hospital could operate on the patient's hernia.

Most conflicts in this category are resolved by simple communication between the health care provider and the patient. Nevertheless, where a patient's legal rights have been violated, an attorney appropriately takes on the role of patient advocate.

EPILOGUE

Since its founding five years ago in early 1983, the AIDS Legal Referral Panel has helped over 4000 persons with AIDS and ARC with different legal problems, ranging from immigration to housing discrimination to workers' compensation cases. But like most other providers of essential AIDS services, the Panel has also experienced a relentless increase in its caseload with each passing year. During 1987 alone the Panel handled 30% more cases than in 1986--for a total 1348 cases.

While the numbers of AIDS cases steadily rise, programs like the AIDS Legal Referral Panel will need the participation of new volunteers and the financial support of community foundations, law firms, and city, state and federal government. Only through this generosity will persons with AIDS and ARC continue to receive high quality legal care at a time when they are most vulnerable.

AIDS LEGAL REFERRAL PANEL

1987 YEARLY REPORT

	J	F	M	A	M	J	J	A	S	O	N	D	TOTAL
CASES	113	90	145	110	97	120	150	131	113	101	105	73	1348
LEGAL REFERRAL	88	77	115	73	73	105	121	114	99	82	91	55	1093
LEGAL SERVICES	3	3	4	6	0	2	7	2	4	6	2	4	43
NONLEGAL REFER.	0	2	6	6	3	0	4	1	1	3	2	3	31
DIRECT OFFICE	22	8	20	25	21	13	18	14	9	10	10	11	181
WILLS, DPAs	51	48	83	42	43	67	69	58	57	49	60	26	653
TRUSTS	0	0	0	1	1	0	0	0	0	1	0	0	3
PROBATE	5	1	4	2	2	3	4	4	2	2	2	4	35
EMPLOYMENT	12	12	13	8	3	4	6	9	5	8	8	3	91
HOUSING	7	9	5	4	10	9	6	8	8	5	4	6	81
GOVT. BENEFITS	3	2	7	7	4	2	22	18	5	6	4	5	85
BANKRUPTCY	11	5	7	10	4	7	8	8	5	4	6	2	77
INSURANCE	11	5	6	13	10	10	8	6	7	7	3	4	90
CRIMINAL*	4	2	5	5	5	6	5	5	6	6	4	4	57
FAMILY	2	0	2	2	1	2	2	1	3	1	4	3	23
HEALTH**	2	3	5	5	4	5	5	4	3	5	5	8	54
MILITARY	0	0	1	0	1	1	3	1	0	0	0	0	7
TORT	0	0	1	1	2	1	4	1	1	2	0	2	15
PUBLIC ACCOM.	0	0	0	2	2	1	0	0	2	2	1	2	12
WORKERS' COMP.	0	0	0	2	1	1	0	1	1	1	0	1	8
TAX	0	1	1	2	0	1	0	2	2	0	1	0	10
CONSERVATORSHIP	0	1	1	0	1	0	0	0	0	0	0	0	3
CORPORATIONS	2	0	0	1	0	0	0	0	0	0	2	0	5
IMMIGRATION	1	0	1	1	1	0	1	1	0	2	0	1	9
PERSONAL PROP.	1	0	0	0	0	0	1	0	2	0	0	0	4
PRISON	0	1	1	0	1	0	1	0	0	0	1	0	5
LICENSURE	1	0	0	0	0	0	0	0	0	0	0	0	1
PATENT	0	0	1	1	1	0	0	0	0	0	0	0	3
CONTRACTS	0	0	1	1	0	0	3	1	3	0	0	1	10
OTHER	0	0	0	0	0	0	2	3	1	0	0	1	7

*includes traffic cases

**includes medical malpractice and patient confidentiality cases

AIDS LEGAL REFERRAL PANEL

1987 YEARLY REPORT

CLIENT INFORMATION*

ANNUAL INCOME	J	F	M	A	M	J	J	A	S	O	N	D	TOTAL
<\$7,000	64	60	89	60	57	74	89	87	72	57	65	34	808
<\$12,000	5	2	10	6	7	7	7	5	5	7	7	3	71
<\$20,000	2	4	6	7	2	7	8	7	8	9	3	2	65
<\$30,000	8	2	8	9	9	10	9	5	6	5	6	6	83
\$30,000+	9	5	8	8	10	3	5	9	4	4	8	7	80
RACE													
CAUCASIAN	75	57	102	80	67	79	90	98	75	65	75	42	905
ASIAN	1	0	1	2	2	2	3	1	1	0	1	0	14
BLACK	3	4	7	1	7	6	5	5	4	7	8	3	60
HISPANIC	9	7	11	7	8	13	10	8	13	10	4	6	106
NAT.AMER.	0	4	0	0	0	0	2	0	1	0	0	1	8
PAC.ISLAND	0	1	0	0	1	1	1	1	1	0	1	0	7

*information based on a total 1,100 clients; excludes data on cases for repeat clients on different legal matters (157); persons with AIDS deceased (43); government benefits cases for which race was unavailable (7); and other miscellaneous (41).

AIDS LEGAL REFERRAL PANEL

1987 YEARLY REPORT

PERCENTAGES OF CASELOAD

AREAS OF LAW

WILLS, TRUSTS, PROBATE	51.3%
EMPLOYMENT DISCRIMINATION	6.8%
HOUSING	6.0%
BANKRUPTCY, CREDIT, COLLECTION	5.7%
GOVERNMENT BENEFITS	6.3%
INSURANCE	6.7%
CRIMINAL	4.2%
FAMILY	1.7%
HEALTH*	4.0%
OTHER**	7.4%

CLIENT ANNUAL INCOME

<\$7,000	73.0%
<\$12,000	6.4%
<\$20,000	5.9%
<\$30,000	7.5%
\$30,000+	7.2%

CLIENT RACE

CAUCASIAN	82.3%
ASIAN	1.3%
BLACK	5.5%
HISPANIC	9.6%
NATIVE AMERICAN	.7%
PACIFIC ISLANDER	.6%

*includes med. malpractice/patient confidentiality

**includes military, tort, public accommodation,
workers' compensation, tax, conservatorship,
corporations, immigration, personal property,
prison, licensure, patent, and contracts cases

AIDS LEGAL REFERRAL PANEL

ANNUAL REPORT 1988

The AIDS Legal Referral Panel
is sponsored by
Bay Area Lawyers for Individual Freedom
and
National Educational Foundation
for Individual Rights
in partnership with the
Bar Association of San Francisco
Volunteer Legal Services Program

AMERICAN BAR ASSOCIATION

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345 CALIFORNIA STREET
SAN FRANCISCO, CALIFORNIA 94104
TELEPHONE: 415/434-7294

March 23, 1989

AIDS Legal Referral Panel
25 Hickory Street
San Francisco, CA 94102

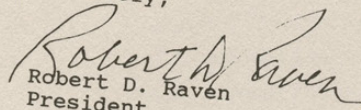
On behalf of the American Bar Association, I commend the AIDS Legal Referral Panel for its work in providing pro bono legal assistance to people with AIDS and ARC in the San Francisco area.

The American Bar Association AIDS Coordinating Committee regards the AIDS Legal Referral Panel as a model for the new referral programs the Committee is helping establish throughout the country. The Committee has invited the Panel to participate in a technical assistance workshop at the ABA 1989 Annual Pro Bono Conference in recognition of ALRP's demonstrated leadership and success.

ALRP volunteers have provided critical legal support to thousands of people in times of personal crisis. ALRP has not only helped these individuals meet their daily and personal needs, but also has made a significant contribution to the fight against discrimination and to the public's knowledge and understanding of AIDS and ARC.

The ABA salutes the personal and professional commitment of all those involved in ALRP. Congratulations on your very important accomplishments.

Sincerely,


Robert D. Raven
President

From the Co-Chairs of the AIDS Panel

Paige Wickland and Mark Senick

On behalf of the AIDS Panel's Management Committee, our thanks for making 1988 a year of great achievement and progress for the Panel. The Panel was formed in 1982 in response to the burgeoning health crisis of AIDS, a devastating illness that has wide social and legal consequences. People with AIDS and ARC not only face serious illness and a likely death, they often face a loss of employment, housing, insurance and access to medical care and government benefits. People with AIDS must make difficult health care decisions as well as manage their personal and financial affairs. Many people

with AIDS are threatened with the loss of their civil rights as a result of discrimination. And, they must deal with all of these problems when their physical health—and as a result, their emotional strength—has been weakened by the ravages of the disease they are fighting as well.

The AIDS Legal Referral Panel provides comprehensive free (and, where appropriate, low cost) legal services to persons with AIDS and ARC in the San Francisco Bay Area. Our 350 attorneys volunteer their time and expertise,

and last year alone we served more than 1,600 clients from five Bay Area counties. The Panel's ability to serve an ever increasing volume of clients results from the hard work of our volunteer attorneys, the generous contributions of our funders, and the excellent work performed on a daily basis by our administrator, our administrative assistant, the Panel's Minority Outreach Coordinator and the Bar Association staff.

Our administrator Clint Hockenberry has been with us since early 1986. Thanks to a grant from the James Irvine Foundation last year we hired our administrative assistant, Rena Frantz. And, with a grant from the United Way AIDS Crisis Fund we have added a Minority Outreach Coordinator, Jackie Peoples. A detailed summary of the work of the Panel's Minority Outreach Project is included in this report.

In addition to increasing the volume and the breadth of its services this year, the AIDS Panel provided some very

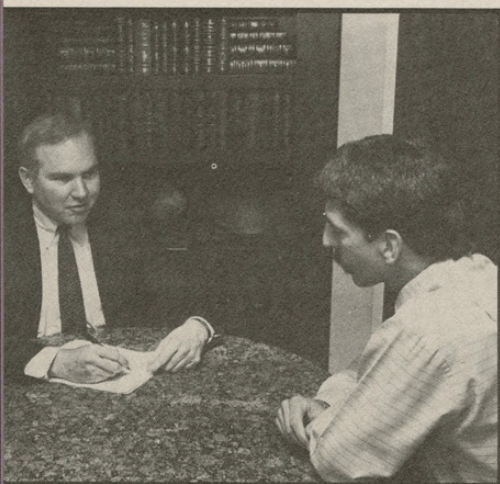
important additional services to the community. We produced two much needed brochures, one addressing the information a client needs for drafting a will, and the second providing general information about the Panel's volunteer services. In November the Panel hosted a national AIDS Law Conference, attended by more than 300 people from 30 states. Everyone who attended the conference received a 700 page manual written by Panel attorneys, providing comprehensive information on every aspect of law critical to serving persons with AIDS, as well as valuable information on setting up an AIDS legal panel.

We also are pleased that we have diversified our funding base this year, strengthening the Panel's ability to respond to the demands for our services. We received our first corporate donations, as well as new grants from two private foundations. We have increased law firm donations and have received contributions from friends and relatives of clients we have served. A full financial report and list of donors is included in this report.

We have accomplished a great deal, and the Panel has dramatically improved the lives of so many who have turned to us for help. We could not have accomplished this without the help of hundreds of attorneys, donors, and supporters. The challenge of continuing to provide the necessary legal services can only be met with your continued support.

On behalf of all of our present and future clients, we thank you for your participation in the Panel's efforts, and we look forward to your continued participation with us in this important work.

PHOTO: STEVE SAVAGE



More than 350 attorneys volunteer their services to help people with AIDS.

Report from the Bar Association of San Francisco

Janet Seldon

One of the most valuable components of the AIDS Panel has been its linkage with local bar associations. Since 1986 the Bar Association of San Francisco Volunteer Legal Services Program (VLSP) has been an important partner in the AIDS Panel. This partnership continued in full force in 1988.

VLSP provides both organizational support and direct attorney assistance to the Panel. VLSP was directly involved in the recruitment and training of one hundred new attorneys in 1988; without these new attorneys it is unlikely that the Panel would have been able to respond to the growing service demand. Attorneys received training in five areas of the law: wills and powers of attorney, social security, alternatives to probate, insurance and women and AIDS.

The importance of the Bar Association partnership is directly reflected in the numbers of clients served: attorneys, paralegals and notaries from the Bar Association's program served more than 350 clients this past year. The Bar Association's staffperson, Janet Seldon, recruits and supervises attorneys, helps organize their training, and is available for ongoing advice and consultation for attorneys. In addition, Ms. Seldon serves on the AIDS Panel's Management Committee, attending monthly meetings and assisting with special projects as needed.

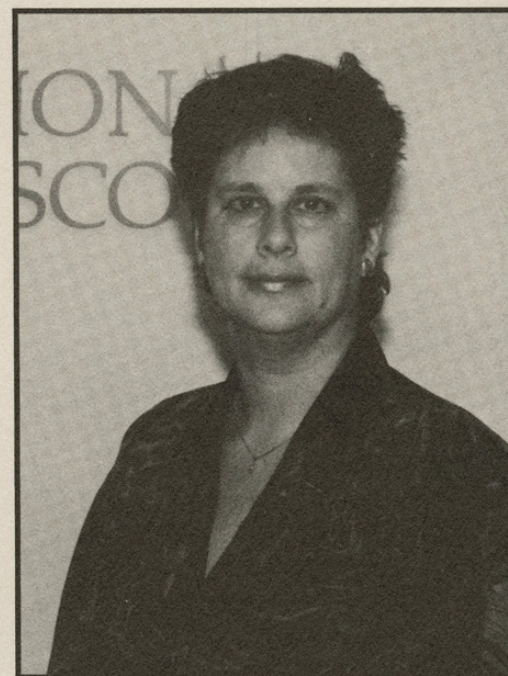
In addition to recruiting and training attorneys, VLSP's support also has greatly increased the legal community's contribution to a wide variety of AIDS service issues. Ms. Seldon met this year with the Women with AIDS/ARC support group on several occasions to better coordinate delivery of legal services to women with AIDS. VLSP was able to solicit help from the San Francisco Women Lawyers Alliance, and provided their attorneys with a special training session. This outreach resulted in the organization of a special group of attorneys able to provide focused services to women with AIDS and ARC.

Consistent with this local effort, Ms. Seldon and VLSP Director Tanya Neiman also helped recruit attorneys for pro bono services to persons with AIDS across the nation. They published an article for the Affiliate, a publication of the American Bar Association, entitled "Lawyers Can Play an Important Role in the AIDS Crisis," which was widely distributed and has served to increase attorney involvement in AIDS service projects across the country. Ms. Neiman also provides technical assistance in program development to colleagues nationwide.

In addition to the valuable attorney recruitment, delivery of client services and development of broader community support, VLSP continues to provide the Panel with material assistance in the form of training materials, long distance telephone calls, postage and stationery, printing costs and videotaping of training sessions. The Bar Association's participation in the Panel provides the Panel with the human resources and organizational strength of a dynamic and conscientious bar association and staff.

The Panel is truly a partnership of all of its sponsoring organizations. As the epidemic spreads and the need for additional volunteer attorneys increases, the Panel's reliance upon its bar association sponsor deepens. VLSP is ready to respond to this need.

PHOTO: SHARI S. COHEN



Janet Seldon

The Work of the Panel: A Report from our Administrator

Clint Hockenberry

The essence of law is helping people cope with problems. This is as true for the AIDS Panel clients as it is for any other clients. But for us, helping clients poses a unique kind of challenge. Every time the telephone rings, another person with AIDS is asking for the help of our volunteer lawyers on an immediate and pressing problem. The requests take many shapes, and our goal is to match each client with an appropriately trained, sensitive and available attorney.

The Panel handled 1,650 AIDS-related cases in 1988.

The statistics show that half of our clients requested consultation and assistance in the preparation of a will and powers of attorney. Testamentary documents are essential for someone with a life-threatening illness: they enable the client to designate who will receive property, who will handle funeral arrangements, and who will make important medical decisions. These are painful decisions involving immediate needs. Consulting a lawyer is part of the clients' acceptance of the enormity of their situation, and our lawyers frequently serve as counselors and friends as well as attorneys.

Other clients need help dealing with insurance

companies, the government and their employers, landlords and creditors. They need lawyers to make phone calls, write letters, and if necessary file lawsuits. Without access to our lawyers, many of our clients would be forced to live without jobs, housing, insurance and benefits, let alone the privacy and dignity to which they are entitled. The work of our attorneys frequently results in dramatic improvements in the lives of our clients.

The case statistics tell us a great deal about the trends in the epidemic. This year we had growing demands for attorneys who could handle denial of insurance and government benefits claims—we find that as our clients live longer

and as new treatments become available, the numbers of clients needing lawyers to fight for government and employee benefits increases. Medical breakthroughs can open the door for new violations of rights, and therefore new legal challenges.

Many clients have suffered when health care providers disclosed their HIV status. And, while AIDS-based discrimination cases have declined in the San Francisco area during the past two years, financial hardship-related cases have increased. Lack of affordable housing, loss of insurance, denial of government benefits—these are daily survival issues that persons with AIDS (PWAs) and ARC face. Many PWAs sought a lawyer to help them through these crises at a time when they were weakest and most vulnerable. We provided lawyers for undocumented aliens seeking amnesty, for destitute PWAs filing bankruptcy, for mothers preparing guardianship papers, and for PWAs denied AZT treatment by the rules of their insurance company.

It is important not to lose sight of the fact that each of our cases represents a person, not just a statistic. One case I remember well involved a close friend, Jody. Jody was an attorney and a volunteer on the Panel, and later, a reluctant client of the Panel. We shared our most intimate secrets, which, of course, included talk of AIDS. One day a neighbor of mine greeted us on the street. My neighbor was a physician, and I soon learned that he was "Jody's" doctor. I was surprised that day when the doctor addressed my friend as Jody, as that was not the name I had used. "Jody" explained that he had assumed a fictitious name because he wanted to protect his privacy, and feared losing his job or health insurance. He was no crusader for civil rights; he simply wanted to be sure that he was not a victim of AIDS discrimination. As the AIDS Panel's administrator, I thought him paranoid. I reminded him that doctors take the Hippocratic Oath, that physicians are bound to keep medical information confidential.

While Jody never lost his benefits, he was nonetheless correct. Over the past years I have spoken with hundreds of PWAs who have lost their jobs, their benefits, their housing, and their security. I have helped waiters who were fired after their physicians informed their employers of their health status. I have referred a client whose doctor did an unauthorized HIV test; only when the healthy client applied unsuccessfully for insurance three years later did he learn that he was seropositive. I have worked with a seronegative

PHOTO: STEVE SAVAGE



Clint Hockenberry

mother and her child after the hospital isolated them because the spouse was HIV-positive. Seeing the "danger" signs on the hospital room door and learning of the spouse's HIV status, the woman's parents abruptly left the hospital without ever seeing their grandchild.

Like other friends, Jody and I shared our disappointments. Jody had always been so cautious, protecting his privacy and retaining his insurance. But when diagnosis day came, Jody was scared and unprepared. Even with his KS diagnosis he didn't prepare a will. For years he wasn't "ready," perhaps thinking he could avoid death if he never signed a will. Even when he saw a lawyer from the Panel, he always had excuses not to sign the prepared will. Then, one day, he died without signing his will. His estate will not pass to his siblings and his lover, as Jody had wanted. So too, other clients die before they obtain the insurance benefits to which they are entitled, or before they can resolve claims against their employers or landlords. Inherent in our work is an acceptance of loss, disappointment and grief.

Amidst all of these problems, the Panel has had many successes. We served more than 1,600 clients on a budget of less than \$100,000. We started a "Wills on Wheels" Clinic at a local hospital. We helped organize numerous legal panels throughout the country. We sponsored a landmark national AIDSLaw Conference, where people from more than 30 states learned substantive and administrative aspects of providing legal services to PWAs. We created an effective Minority Outreach Project, to respond to recent trends in the epidemic, and we produced two brochures informing the public of our services.

We have accomplished a great deal for our clients this year at a minimal economic cost to the community, and we have galvanized the energies and talents of hundreds of attorneys. And, equally important, we continue to draw our sustenance from our clients, who inspire us to contribute our legal skills to help those in need.

1988 ANNUAL SUMMARY OF CASES

Total Number of Referrals:	1,653
Total Number of Attorneys:	350

Areas of Law (as percentage of cases)

Wills, trusts, probate	49.8%
Insurance	8.4%
Government benefits	7.0%
Housing	6.5%
Employment discrimination	5.9%
Bankruptcy, credit	5.1%
Health (includes medical)	4.9%
Criminal	3.5%
Family	1.5%
Tax	1.4%
Other (includes military, tort, corporate, immigration, property, workers' compensation, contracts)	6.1%

Client Annual Income

Less than \$7,000	66.6%
Less than \$12,000	8.4%
Less than \$20,000	7.6%
Less than \$30,000	8.2%
More than \$30,000	9.2%

County of Residence

San Francisco	81.4%
Alameda	10.1%
Contra Costa	3.6%
San Mateo	3.2%
Marin	1.7%

Client Race

Caucasian	82.3%
Hispanic	8.5%
Black	6.8%
Native American	1.0%
Asian	.8%
Pacific Islander	.6%

The New Challenge: Minority Outreach at the AIDS Legal Referral Panel

Jackie Peoples

One of the most important challenges facing the AIDS Panel is the need to respond to the legal needs of growing numbers of minorities and intravenous drug users (IVDU) with AIDS. The AIDS Panel began as a project of the Bay Area's lesbian and gay legal community, and consistent with the nature of the epidemic most of its clients have been gay men. True, our client statistics demonstrate that we have continuously served people of color, and the Panel has always prided itself on serving everyone with AIDS who requests its services. But often, a lack of awareness or access may have discouraged

certain eligible clients from requesting the services of an attorney. Because of these concerns, and because of the awareness of the national and local trends in this epidemic, the Panel created the Minority Outreach Project.

Funded by a grant from the United Way's AIDS Crisis Fund, the Panel's Minority Outreach Project was initiated in October 1988. The purpose of the project is to improve delivery of legal services to people of color and intravenous drug users with AIDS or ARC. In addition to helping improve existing Panel services, the Project works to create new legal clinics designed to serve

minority communities. The coordinator of the Project is Jackie Peoples, who holds a law degree and was formerly a Shanti Counselor at San Francisco General's AIDS ward.

In the Project's first four months, committees were formed in the Black, Hispanic and Asian communities to help design the Project's efforts. Committee members were selected for their reputations in serving persons with AIDS in their community and their commitment to working with delivery of legal services to these populations. The committees have worked together to assess and outline the legal needs of their communities, and have established initial goals to be

accomplished by May 15, 1989. The Project's coordinator works closely with each committee and with the many service organizations serving the minority and IVDU AIDS populations. To better serve the Black community, a committee of pivotal people from San Francisco and the East Bay has been formed, and a working relationship with Bayview-Hunters Point Foundation has been established. A recruitment strategy for soliciting volunteer attorneys from the Black community has been developed, and a close relationship with the AIDS Project of the East Bay has been created. A special clinic serving East Bay clients will soon be established with the AIDS Project of the East Bay and the Alameda County Bar Association.

With regard to the Hispanic community, an advisory committee has been formed, a relationship with Hispanic employees of the AIDS Foundation has been formed, and a specialized clinic to serve Hispanic persons with AIDS is now being developed. Work is also underway to better serve the Asian community, by forming an appropriate advisory committee, establishing a working relationship with the Asian AIDS Task Force, and by providing specialized AIDS-related training for existing volunteers at the Asian American Bar Association lawyer referral service. Finally, services for intravenous drug users with AIDS are being developed, by establishing a working relationship with Mid-City Consortium and Westside AIDS Case Management Program, which will include educational services and, if appropriate, specialized legal clinics.

Current funding for the Minority Outreach Project expires in July of 1989. Fundraising for additional funds is under way, and if additional funding can be obtained, more specialized clinics will be established, closer ties with minority and IVDU-serving organizations will be formed, and more attorneys serving minority and IVDU persons with AIDS will be recruited and trained.

PHOTO: STEVE SAVAGE



Jackie Peoples

AIDSLaw 1988: A National AIDS Law Conference

Rena Frantz

The AIDS Legal Referral Panel sponsored a national AIDSLaw Conference in San Francisco in November of 1988. More than 300 attorneys and AIDS service providers were in attendance, representing 30 states, England and Canada. The goal of the Conference was to foster the creation of new AIDS legal service projects in underserved areas of the country, and to improve the quality of existing AIDS legal services. The Conference was co-sponsored by BALIF and NEFIR, the Employment Law Center of the San Francisco Legal Aid Society, and the Volunteer Legal Services Program of the Bar Association of San Francisco.

The Conference was a resounding success. The workshops covered a wide range of topics, both substantive and administrative. The substantive topics included such matters as patient confidentiality and mandatory testing, employment and housing discrimination, wills and powers of attorney, credit and collection disputes, insurance and government benefits, and family law matters. The administrative topics focused on how to create and operate a legal referral panel for persons with AIDS, as well as discussions of such issues as attorney training and recruitment, fundraising and relationships with other legal organizations. The Conference sparked great enthusiasm, and created a wonderful atmosphere as attorneys from all sectors of the country received training and compared their experiences on a wide variety of AIDS legal concerns.

The strong response to the Conference demonstrated that many new AIDS legal services programs are being created throughout the country. Several different models of programs are being developed, some growing out of bar associations, others sponsored by lesbian/gay organizations, and others created by AIDS services projects. In some areas, individual attorneys or small group practices often are the sole providers of legal services for persons with AIDS.

In addition to the training and sharing of experiences at the Conference, registrants also received a comprehensive 700 page manual covering all of the Conference topics. The manual serves as a reference guide, as well as a training resource for attorneys handling all kinds of AIDS legal matters. Additional copies of the manual have been made available nationwide to attorneys who could not attend the Conference.

The Conference was an important event for the AIDS Panel this year. It marked a "coming of age" for the Panel, allowing the Panel's staff and attorneys to share their knowledge and experience with hundreds of concerned attorneys from across the country. Thanks to the tremendous effort of the Panel's office staff, and thanks to the important contributions of each of the Conference's sponsoring organizations, the Conference served as an educational and inspirational event that, in the end, will benefit thousands of persons with AIDS.

PHOTO: STEVE SAVAGE



Rena Frantz

1988 Financial Report

Frederick Hertz

During the past year the Panel responded to a dramatic increase in the demand for our services, serving nearly one third more clients in 1988 than in 1987. In addition to increasing the size of our Panel and responding to the growing number of clients, the Panel has greatly improved the quality of its service delivery. We hired an administrative assistant, Rena Frantz, who has taken over many of the routine—but nonetheless valuable—administrative functions of the Panel, improving our communication with attorneys and increasing our organizational strength. Rena began the year working half time, and by the end of the year she was working full time. In addition, thanks to the United Way's AIDS Crisis Fund we have hired a full time Minority Outreach Coordinator, Jackie Peoples. Early this year our three person staff moved into its own offices, in space shared with the San Francisco AIDS Foundation's Food Bank.

As a result of these changes our 1988 budget was approximately \$90,000, twice our 1987 budget. A substantial portion of this increase covered the salaries and benefits for our new employees, as well as valuable part time student assistants and increased photocopying and equipment costs. This year we produced two brochures for public distribution, one with information on drafting a will and the other describing the AIDS Panel's volunteer legal services. A summary of our 1988 expenditures follows this financial report.

Our goal for 1989 is to maintain our staff and operating expenses at approximately the same levels as 1988, attempting to serve increased client demands with more volunteers and an even more efficient organization. The 1989 budget for the AIDS Panel is \$127,000, which includes our administrator and assistant positions, additional months for the Minority Outreach coordinator, and a special grant for a planning consultant. We look forward to working with planners from Harder & Kibbe in developing long range program and financial planning for the Panel. The Bar Association of San Francisco Volunteer Legal Services Program devotes approximately \$30,000 in staff time and expenses to its AIDS Project's attorney recruitment and case tracking efforts. To the extent that our current efforts are successful, we hope to extend the Minority Outreach Project, create a special government benefits project, and develop a costs reimbursement fund for impact litigation.

Fortunately, our fundraising has kept up with the demands for our services and the resulting budget increases. As the financial summaries demonstrate, we have diversified our funding base as well as renewed several key grants. We received major foundation grants this year from the van Loben Sels and the San Francisco Foundation, both of which have been vitally important for our project since its inception. A generous grant from the James Irvine Foundation will be

supporting our administrative assistant position through the end of 1989, and this year we received grants from the HKH Foundation and the Nu Lambda Trust. We are especially proud of having received a grant from the United Way's AIDS Crisis Fund for our Minority Outreach Coordinator, and we recently received a major grant from the Northern California Grantmakers AIDS Task Force. Our foundation fundraising efforts will continue throughout the year.

This year we also received funds from several new sources, which is essential for our long term fiscal strength. We were chosen as a beneficiary of the showing of the Names Project's AIDS Memorial Quilt in San Francisco, in connection with which we also were chosen as a beneficiary of the San Francisco Examiner's annual charity drive. We received our first corporate donations, from the Bank of California, First Nationwide Bank, The San Francisco Recorder and The 26 East Realty Corporation. In addition, in 1989 we will receive our first bequest, from the estate of David Cole. Mr. Cole won a landmark AIDS-based discrimination lawsuit filed by two Panel attorneys, and a portion of the settlement was left to the Panel by Mr. Cole upon his subsequent death. The Panel also will receive funding in 1989 from the State Bar of California's Legal Services Trust Fund Program. The Panel earned money on its national AIDSLaw conference, notwithstanding the fact that the charge for attendance at the conference was only \$50—barely enough to cover the photocopying of the 700 page manual we distributed to participants at the conference.

Finally, the results of our fundraising outreach to BALIF attorneys and San Francisco law firms in 1988 met our ambitious expectations. We received donations from more than twenty law firms and over seventy-five BALIF attorneys, and we received several thousand dollars in donations from friends of Panel attorneys and relatives of clients—the best kind of thanks we could ask for. To all of our donors, our most sincere and heartfelt thanks for the support you have shown our project this year. A list of our 1988 donors can be found at the end of this report.

As the accompanying financial summary demonstrates, the Panel currently has sufficient funds to operate through early 1990. Because of the growing demand for AIDS services, the need for ongoing fundraising for the Panel grows more challenging each year. In the coming year the Panel will continue its foundation efforts, increase its corporate and law firm campaigns, and make a special effort to seek out individual donors. We also will increase our outreach to individual attorneys and continue to seek out new sources of funding. We know the tremendous need for our services, and to date we have been successful in recruiting and training enough volunteer attorneys. Ongoing fundraising is needed to ensure that our staff is able to link our volunteer attorneys to the clients in need of their assistance.

AIDS LEGAL REFERRAL PANEL STATEMENT OF FINANCIAL CONDITION

Cash on hand January 1, 1988	73,846
Income Received 1988	86,657
Expenses incurred 1988	93,672
Cash on Hand January 1, 1989	66,831
Income 1989 (committed)	108,000*
Expenses 1989 (budgeted)	127,000
Reserve for 1990	\$47,831

**In early 1989 the Panel received \$33,000 from Northern California Grantmakers for its Community Care Project. Of these funds, \$12,500 will be used for VLSP salaries and costs and \$20,500 to support the Panel's administrative costs.*

SUMMARY OF EXPENSES

	1988 (actual)	1989 (budgeted)
Salaries		
Administrator	32,000	35,000
Admin. Ass't	18,400	26,000
Benefits	7,868	15,000
Part-time employees	2,522	2,500
Rent/telephone	6,874	7,000
Photocopy	1,601	2,000
Postage	463	1,100
Supplies	865	1,000
Equipment	3,156	4,000
Training	92	250
Insurance	3,786	4,000
Outreach/publicity	3,115	4,000
Publications	4,500	2,000
Subscriptions	484	500
Petty Cash	200	400
Minority Outreach	7,746	17,250
Planner		5,000
ANNUAL TOTAL	\$93,672	\$127,000

SUMMARY OF INCOME

SOURCE	1985	1986	1987	1988	1989 (committed)*
Foundations					
GGBA/Horizons	2,000	1,000		750	
BASF	4,000	1,750			
van Loben Sels	5,000	10,000	10,000	10,000	
San Francisco		10,000	15,000	20,000	25,000
Capp Street		950			
Kaiser Family		15,000			
Chicago Resource		10,000			
Skaggs		5,000			
Haas Fund			10,000		
James Irvine			10,000	10,000	20,000
HKH Foundation				10,000	
Nu Lambda Trust					4,000
Northern California Grantmakers					20,500
United Way (Minority Outreach)				12,500	12,500
State Bar Trust Fund					9,000
Corporations				1,500	
Law Firms	1,125	3,850	6,939	9,295	
Bequests					5,000
Individual Donors	1,840	6,522	5,176	6,920	5,000
Special Projects					2,500
Attorneys fees			2,030	2,115	
Earned Income				1,521	2,500
Interest earned		1,800	2,143	2,056	2,000
ANNUAL TOTAL	\$13,965	\$65,872	\$61,288	\$86,657	\$108,000

**1989 income includes 1988 commitments and 1989 receipts to date, omitting current fundraising efforts.*

***The AIDS Legal Referral Panel
gratefully acknowledges its donors:***

FOUNDATIONS

The San Francisco Foundation
The James Irvine Foundation
The Ernst and Eleanor van Loben Sels Foundation
The HKH Foundation
The Horizons Foundation
United Way of the Bay Area—AIDS Crisis Fund
The Nu Lambda Trust

CORPORATIONS

Bank of California
First Nationwide Bank
The San Francisco Recorder
The 26 East Realty Corporation

LAW FIRMS

Bacci & Bacci
Bayside Legal Advocates
Broad, Schulz, Larson & Wineberg
Burnstein & Bull
Epstein, Becker, Stromberg & Green
Farella, Braun & Martel
Feldman, Waldman & Kline
Goldberg, Stinnett & MacDonald
Graham & James
Hanson, Bridgett, Marcus, Vlahos & Rudy
Heller, Ehrman, White & McAuliffe
Law Offices of Thomas Horn
Howard, Rice, Nemerovski, Canady,
Robertson & Falk,
in loving memory of their partner Jay M. Spears
Kadushin—Fancher—Wickland
Majestic, Parsons, Siebert & Hsue
McCutchen, Doyle, Brown & Enersen
Robert J. Sheppard & Associates
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AIDS Legal Referral Panel Management Committee

Daniel Chesir
Barry Graynor
Frederick Hertz
Alice Philipson
Ora Prochovnick
Andrea Palash
Kathleen Quenneville
Janet Seldon
Mark Senick, *co-chair*
Paige Wickland, *co-chair*
Gary Wood
Carl Wolf

PHOTO: STEVE SAVAGE



*AIDS Panel attorneys visit clients in
homes and hospitals.*

A note of recognition:

When Steve Richter and I met at a BALIF party in 1982 and discussed the need for attorneys to serve people with AIDS, we had little idea of what our project would become. In the midst of the devastation of AIDS the Panel has become a source of pride for all of us. Hundreds of individuals make the Panel possible, but a few have given so very much. First, our appreciation to the late Steve Richter, who inspired us all, and to former co-chairs Gary James Wood and Alice Philipson and current co-chairs Mark Senick and Paige Wickland. My personal thanks to Barry Graynor and Alissa Friedman for their fundraising efforts, and to Clint Hockenberry and Rena Frantz, who were always patient and helpful, despite the extent of my requests and the demanding pressures they face each day.

Frederick Hertz, AIDS Panel Development Chair

AIDS Panel Staff

Clint Hockenberry, *Administrator*
Rena Frantz, *Administrative Assistant*
Jackie Peoples, *Minority Outreach Coordinator*

Bar Association of San Francisco Volunteer Legal Services Program Staff

Tanya Neiman, *Director*
Janet Seldon, *Administrator*

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*In being able to provide
so many different kinds
of legal help to people
with AIDS, the AIDS
Panel performs a truly
critical function: it helps
to buffer that very
capriciousness, that
unpredictability, which
AIDS so often imposes
on people's lives.*

DAVID McCULLOUGH
PARALEGAL OF THE YEAR

AIDS LEGAL REFERRAL PANEL 1990 Annual Report

I greatly appreciate the service and the promptness of completion, and the courteous people. I could not have done it on my own as I can't get around that easily.

CLIENT WHO RECEIVED WILL AND POWERS OF ATTORNEY

This program is important! I would have simply given up my rights without your help.

CLIENT RECEIVING ASSISTANCE WITH A WORKERS COMPENSATION CLAIM

I'm not in very good physical condition.

The ALRP attorney was kind enough to come to my home when I was bedridden, so that I wouldn't have to leave my home. I was very pleased with the ALRP, especially since I am on a limited budget and was afraid to see a

lawyer, thinking I could never afford it. I feel much more relaxed now.

PERSON WITH AIDS WHO OBTAINED WILL AND POWERS OF ATTORNEY

My attorney was great and helpful, and even came to my home due to my limited mobility.

PANEL CLIENT WHO RECEIVED A SIMPLE WILL

It's a relief just to know that you are there.

I received expert, courteous service from everyone. Thank you.

AIDS PANEL CLIENT WHO RECEIVED ADVICE ABOUT A HEALTH INSURANCE PROBLEM

Your programs are wonderful. My attorney made my life richer, less complicated, and more enjoyable. I thank all of you at ALRP.

PERSON WITH AIDS WHO RECEIVED WILL AND POWERS OF ATTORNEY

REPORT FROM THE PANEL'S 1990 CO-CHAIRS

Mark Senick and Paige Wickland

The strength of the Panel in 1990 is best demonstrated by an acknowledgment of how we have grown over the past eight years. The Panel was formed in 1983 by a group of attorneys from Bay Area Lawyers for Individual Freedom (BALIF), the local lesbian and gay bar association, in response to the growing health crisis facing so many gay men. BALIF attorneys were concerned about the legal problems of those with the virus whose relationships were not protected by state law. Legal steps were needed to insure that their needs and testamentary plans were recognized, and that those with AIDS would be shielded from discrimination — a difficult challenge at a time when our clients were so weakened by the disease.

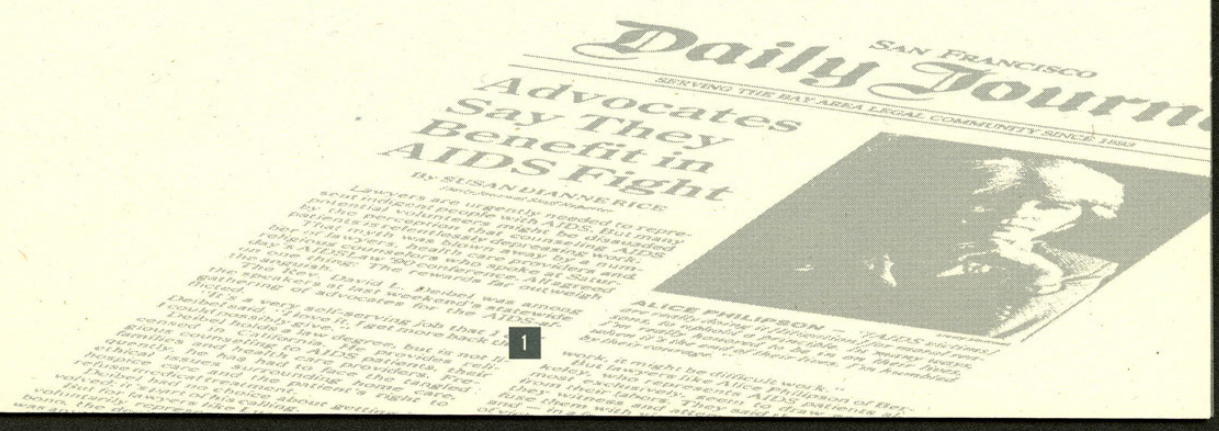
The Panel was formed with modest goals. We assembled a list of volunteer attorneys and referred clients for legal services. Wills and powers of attorney were provided free to those with AIDS or ARC, and other services were provided as needed. The late Steven Richter of BALIF ran the Panel from a list of telephone numbers in his desk drawer, with the help of his associate Gary James Wood. In early 1986 we hired our administrator, Clint Hockenberry; in 1988 Rena Frantz joined us as administrative assistant.

The Panel has been forced to expand due to the continuing increase in cases in the San Francisco area. Fortunately, the legal community's response has matched the demand. In 1986 we joined forces with the Bar Association of San Francisco's Volunteer Legal Services Program, a partnership which has helped boost our volunteer panel to more than 400 attorneys. The Bar Association has been vitally important to our quality control and case tracking programs. Donor response also has been outstanding. At first we relied on local foundations, but in recent years the support of the legal community has increased dramatically. Nearly one fourth of our 1990 budget was donated by local law firms. Thanks to this strong financial support, we have been able to hire a client services coordinator, an outreach director and a receptionist.

The nature of the epidemic itself has changed over the past eight years. People of color, intravenous drug users and women and children suffer from AIDS, and these communities have different legal needs than the gay men our Panel was originally designed to assist. While the great

Lawyers who represent AIDS patients seem to draw energy from their labors. The outrages they witness and attempt to redress infuse them with vigor, a sense of purpose and — in a few fortunate cases — a degree of victory.

SUSAN DIANNE RICE
The Daily Journal

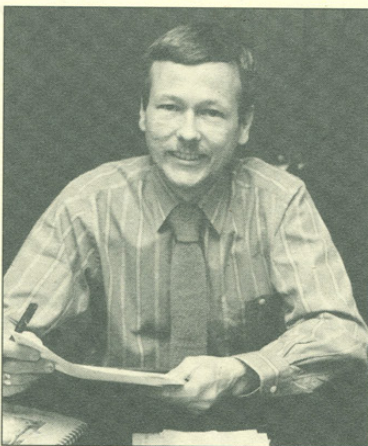


majority of our clients continue to be gay men, we have developed an outreach program to reach our new clients. Legal clinics are held throughout the area, and we now provide individualized services for those who do not have ready access to attorneys through our telephone referral programs.

As you will read in this Report, 1990 was a year of many changes. We became our own non-profit corporation while maintaining our close ties to BALIF and the Bar Association. We moved to larger offices, thanks in great part to the assistance of our landlord, Pillsbury, Madison & Sutro. Our staff has grown, and, most importantly, we served more than 2,000 clients. The support of local law firms continues: this year's "Law Firm of the Year Award" went to Brobeck, Phleger & Harrison, in recognition of their broad support of the Panel's activities.

The coming year presents many challenges to the Panel. We have received our first government grant, designed to provide additional assistance to clients with benefits and insurance problems. Our outreach efforts have been expanded into San Mateo County, and we will be increasing our services to underserved communities throughout the region. We will be tightening our case tracking and quality control requirements. And, we intend to meet these challenges without losing our fundamental sense of purpose.

In 1991 the two of us stepped down as co-chairs, and the Board unanimously elected Ilene Gusfield and Paul Richard to take our places. Their new responsibilities certainly will be demanding, and often times difficult. But with our strong and hard working Board and our dedicated staff, we are confident that they will provide superb leadership for our organization. We pledge to them our continuing support. We are confident that the challenges they and the Panel face will be met, with your continued participation and assistance. On behalf of all of our clients, we thank you. ■



Executive Director Clint Hockenberry



The Panel's Board of Directors

REPORT FROM THE PANEL'S EXECUTIVE DIRECTOR

Clint Hockenberry

This was a year of major change for the Panel. On an organizational level, it was our first year as an independent §501(c)3 project. This meant a change in the status and role of our board, and a slight shift in our public image. We "emerged" as a specially focused AIDS service project; maintaining our close ties to the lesbian/gay legal community and the Bar Association of San Francisco, but functioning and thriving as a self-sufficient organization. We also coped with the harrowing — but ultimately satisfying experience of relocating our offices. After a lengthy search, we were able to obtain significantly larger offices in space leased from the San Francisco law firm of Pillsbury, Madison & Sutro. It took us some time to locate furniture, wire the telephone lines and set up our desks, but we now have space for more staff, for our many meetings, and for volunteer attorneys and office assistants. The new office has greatly improved our ability to serve clients and expand our broader educational and advocacy programs.

We also refined our service programs in several respects. The Minority Outreach Program — renamed the Outreach Program — and the Employee Benefits & Insurance Program received greatest attention, in response to the growing demand for services in these two difficult and complex areas. We improved our services overall by hiring a Client Services Director, consolidating our telephone referral services under a single staffperson. We also hired a part-time receptionist/secretary, improving the ease of telephone access and relieving the staff of some of the ever-flowing paperwork.

The Panel participated in a wide range of community efforts. We published three educational brochures and revised the heavily used AIDS Law Manual. We had booths at the Lesbian/Gay Freedom Day Parade and the International AIDS Conference, and held a highly successful law firm fundraiser in the fall. We also kept true to our primary mandate, serving more than 2,000 clients and responding to nearly 3,000 general telephone inquiries.

Nearly all of our clients are economically vulnerable, and more than three quarters of them are indigent. On top of their pressing medical condition,

Employment discrimination has dropped as a percentage of the AIDS Legal Referral Panel's caseload, but problems with insurance and housing matters are on the rise.

THE RECORDER



AIDS Panel Clients: 1990

Type of Referral

Wills, powers of attorney, probate	47%
Insurance and government benefits	18%
Housing disputes	10%
Bankruptcy, tax, financial matters	10%
Employment disputes	4%
Criminal matters	4%
Family, health and other matters	7%

County of Residence

San Francisco	73%
Alameda	15%
Contra Costa	6%
San Mateo	3%
Marin	2%
Sonoma	1%

Client Income

Under \$7,000	55%
\$7,000 to \$12,000	18%
\$12,000 to \$20,000	9%
\$20,000 to \$30,000	7%
Over \$30,000	11%

Client Race

Caucasian	79%
Hispanic	10%
African-American	9%
Asian-American, Native American	2%

they face the ravages of skyrocketing medical costs, the desperate need for affordable housing, the looming prospects of unemployment and the accompanying loss of medical benefits, and the angry calls of bill collectors. These are the stresses and crises that our clients must face each and every day.

Our clients include, for example, long-term employees who learn that they will soon lose their health insurance. They include undocumented immigrants with AIDS who need government assistance. They include mothers who are no longer able to care for their children because of failing health. In each of these situations, an attorney can make a tremendous difference. For each of our clients, we provide an advocate, usually free of charge, who will take on these struggles and provide assistance. In some situations, there are no easy legal solutions, but still, our attorneys can help "talk it through," and can provide counseling for how best to cope with the ever increasing difficulties.

The work is often hard, and it is understandably full of frustrations and challenges. Yet we know that without the services of the Panel and our attorneys, most of our clients would have nowhere else to turn. And so, at the same time, our work is tremendously rewarding and meaningful. ■



Panel attorney consults with client

THE CORE OF THE PANEL

Our Volunteer Attorneys

The key to the success of the Panel is its reliance upon more than 400 volunteers. These are women and men who donate their time and expertise, year after year, to help our clients. It is because of their efforts that we are able to serve so many people with AIDS on such a modest budget. It is because of them that our clients have the protection, the counseling and the advocacy services they need and deserve.

Some of our volunteers are attorneys who work in large Bay Area firms:

Michael Zischke practices with the Walnut Creek office of McCutchen, Doyle, Brown & Enersen. He writes wills and powers of attorney for our clients in Contra Costa County, and has served on our Panel since 1988. While his law practice is in the area of land use, he finds working for the Panel very rewarding. He states it directly: "Helping Panel clients is fun because the people appreciate the work so much."

Nancy Koch is a partner at Farella, Braun & Martel in San Francisco. She normally handles securities and a broad array of commercial litigation, but for us, she does wills and simple client advocacy. Nancy has practiced law since 1983, and she joined the Panel in 1987. She came to us because she feels like she's making a difference in the lives of real people who are facing serious and immediate legal problems.

Other attorneys work in smaller offices or business, and many are solo practitioners:

Bernadette Bolger is a Vice President at Bank of California, where her practice involves employee benefits and fiduciary services for the Bank. She is a member of our Employee Benefits Task Force and staffs one of our even- ing employee benefits clinics. She joined the Panel last year for a simple reason: it gives her a chance to do volunteer work in her area of expertise.

When I heard about
the need for attorneys
to work with the AIDS
Legal Referral Panel,
I was excited about
being able to represent
individual clients and
to learn about a new
area of law.

MITCH BECKLOFF

BAR ASSOCIATE OF SAN FRANCISCO

Volunteers of the Month

Connie Hiatt and Mitch Beckloff



This month, the Volunteer Legal Services Program is honoring two outstanding volunteers for their contributions to the AIDS Legal Referral Panel. Connie Hiatt and Mitch Beckloff are both attorneys who work in large Bay Area firms and have been active in the Panel since 1987. Connie Hiatt is a partner at Farella, Braun & Martel in San Francisco, and Mitch Beckloff is a partner at McCutchen, Doyle, Brown & Enersen in Walnut Creek. Both attorneys have extensive experience in the area of wills and powers of attorney, and they have been instrumental in helping Panel clients with these documents. Connie Hiatt has also been active in the Panel's efforts to provide legal services to people with AIDS, and she has been a member of the Panel's Executive Committee since 1988. Mitch Beckloff has also been active in the Panel's efforts to provide legal services to people with AIDS, and he has been a member of the Panel's Executive Committee since 1987. Both attorneys have been instrumental in helping Panel clients with their legal needs, and they have been a valuable part of the Panel's team.

Connie Hiatt and Mitch Beckloff are both attorneys who work in large Bay Area firms and have been active in the Panel since 1987. Connie Hiatt is a partner at Farella, Braun & Martel in San Francisco, and Mitch Beckloff is a partner at McCutchen, Doyle, Brown & Enersen in Walnut Creek. Both attorneys have extensive experience in the area of wills and powers of attorney, and they have been instrumental in helping Panel clients with these documents. Connie Hiatt has also been active in the Panel's efforts to provide legal services to people with AIDS, and she has been a member of the Panel's Executive Committee since 1988. Mitch Beckloff has also been active in the Panel's efforts to provide legal services to people with AIDS, and he has been a member of the Panel's Executive Committee since 1987. Both attorneys have been instrumental in helping Panel clients with their legal needs, and they have been a valuable part of the Panel's team.

Connie Hiatt has been able to use her expertise by participating on a pro bono basis in the AIDS Panel's Employee Benefits Clinic.

Clients facing a life-threatening illness are confronted with complex questions regarding health insurance coverage for experimental drugs, COBRA coverage, disability policies, and government benefits.

Anson Reinhart has his own bankruptcy practice in Oakland. He has been with the Panel since its inception, and was the originator of the "judgment proof letter" included in one of our brochures. He provides debt counseling and bankruptcy guidance to Panel clients, offering some relief to anxious and concerned people with AIDS facing serious financial problems.

The Panel increasingly relies on paralegals and notaries to help our clients:

Larry Santana has been a notary for five years, and has helped Panel clients for three years. He's fluent in Spanish and is willing to make home and hospital visits to our clients. He feels strongly about helping those with this disease: "I'm a very sentimental person. I always think, there but for the grace of God go I."

Chaya Gordon is a legal secretary at Pillsbury, Madison & Sutro. She connects the clients to the Pillsbury attorneys, runs the conflict checks, and does whatever special tasks are needed to keep things running smoothly for Panel clients. Chaya describes her work accurately when she explains that she is "proud to participate in the delivery of quality legal services to people who would not otherwise be able to obtain representation." ■

AIDS Counsel Come Looking For Education

By SUSAN DIANNER RICE
Daily Journal Staff Reporter

Most people think of the AIDS crisis as a crisis of medical care — inadequate resources and insufficient knowledge about the causes and cure of the disease. But it is becoming increasingly apparent that there is a tertiary crisis of legal care — too few lawyers to handle the complex legal problems faced by an ever-expanding population of AIDS sufferers.

Attorneys throughout California who work with the AIDS-afflicted are seeking a cure to the legal problems plaguing their clients. They recruited a daylong conference Saturday at Santa Clara University, the second statewide gathering of its kind. Another 30 people — attorneys, health care givers and people with AIDS — participated in AIDS Law '90 as workshop leaders.

"There is a whole network now of AIDS legal service agencies cropping up all over the state," Gerald Uelman, dean of Santa Clara University School of Law, said in an interview Saturday. "As we're enlisting more lawyers and volunteers in providing legal services for AIDS- and HIV-infected patients, we need to educate them."

The kinds of legal problems suffered by people with AIDS often have little to do with health issues per se. They have to do with child custody, insurance bad faith, estate planning, immigration, civil rights and a host of other issues.

A common thread running through most of these issues is discrimination based on inaccurate stereotypes and irrational debunking the myths that have already are ill.



GERALD UELMEN — "As we're enlisting more lawyers and volunteers in providing legal services for AIDS- and HIV-infected patients, we need to educate them."

of topics instructed AIDS advocates in the fine art of finessing a legal system that often seems bent on compounding their often seems horrendous health problems.

Conference organizers estimate that AIDS Law '90 cost about \$7,000. Funding was provided by registration fees, federal sponsors and a \$3,000 grant from the Washington, D.C.-based National Health Lawyers Association.

Lawyers that provided financial support include Mendelson, Rastoff & Foerster and Little, support was provided by the AIDS Legal Services consortium of AIDS attorneys in the state. "Many of

THE AIDS PANEL STAFF

The Work of The Referral Office

We could not possibly help so many clients without our dedicated and skilled staff. When the Panel was first organized in 1983, we simply had a list of telephone numbers of interested attorneys, and one of the Panel attorneys took calls from clients and referred the client to an attorney. As our case load has grown and the range of our services has expanded, so has the size of our staff.

Clint Hockenberry, J.D., our Executive Director since January of 1986, has had another productive and busy year. He recently completed the editing of the second edition of the AIDSLaw Manual. Clint was a founder of the State AIDS Legal Services Association (SALSA!). He participated in providing vital legal information at the International Conferences on AIDS in San Francisco and Montreal and in producing a series of pamphlets on HIV infection and the law. Clint administers the Panel's programs, supervises the staff, and coordinates relations with the Board, other Bar Associations and other AIDS service providers.

Jackie Peoples, J.D., was the Director of the AIDS Panel's Outreach Project from 1988 until 1991. She received her law degree from New College of California in 1988 and her undergraduate degree from the University of California Los Angeles. Prior to coming to work with the Panel in 1988, she was a counselor for the Shanti Project on Ward 5A at San Francisco General Hospital. Jackie coordinated our programs to serve people of color and intravenous drug users with HIV infection, including our numerous walk-in clinics held throughout the Bay Area. The primary purpose of her efforts has been to increase services for IVDUs and people of color. In March of 1991, Jackie took a new job with the County of San Mateo, but continues to work with the Panel in connection with our San Mateo and outreach programs.

Kristin Chambers, J.D., came to the Panel in 1990 to fill the newly created position of Client Services Director. The work is quite different from her former position as an associate with Pillsbury, Madison & Sutro. Kristin handles the job of client intake and counseling, speaking with our clients, evaluating their situation, and referring them to the appropriate Panel attorney. She also administers the Panel's weekly Employee Benefits Clinic, which provides walk-in counseling services to clients facing employee benefits problems.

Rena Frantz recently returned from maternity leave to take on her new position as Office Manager. Rena first began working with the Panel in 1988 as Administrative Assistant, with a background in counseling and social work. In addition to handling the ever growing paperwork and recordkeeping aspects of the Panel's operations, her projects this year will focus on streamlining the office administration and referral procedures to increase their efficiency.

Mary Ann Pouls has been the Panel's receptionist and clerical assistant since August of 1990. She is also a graduate student in Egyptian Archeology at UC Berkeley. A former corporate paralegal, it is Mary Ann's warm and cheerful voice on our end of the telephone line (in English and Spanish) that helps many of our clients on the way to finding solutions to their legal dilemmas.

The Panel's operations also are greatly assisted by the work of:

Janet Seldon, Staff Attorney at the Bar Association of San Francisco's Volunteer Legal Services Program, who devotes a significant part of each day recruiting, training and supervising the many Panel attorneys who have come to us through the Bar Association's efforts.

Kevin Walsh, the Panel's Development Officer, who has assisted us in our fundraising efforts for the past two years. His work focuses on foundation and corporate grantwriting, and he has been closely involved with the Panel's grant from the Ryan White CARE funds. Kevin, who formerly was with the San Francisco AIDS Foundation, describes his work with the Panel as "extremely rewarding; it's wonderful to see a small, volunteer-driven organization that is able to deliver a basic and crucial service. It's amazing to see what our volunteers can do for our clients." ■

THE ROLE OF THE BAR ASSOCIATION OF SAN FRANCISCO

Janet Seldon, VLSP Staff Attorney

One of the more valuable aspects of the Panel is its close relationship with the Bar Association of San Francisco's Volunteer Legal Services Program (VLSP). Since 1986, VLSP has recruited hundreds of San Francisco attorneys for the Panel through brochures, regular newspaper articles, and speaking engagements of Bar Association staff. Through these recruitment and training efforts, VLSP has added many attorneys to the Panel who would not otherwise have volunteered. VLSP also administers training programs for all Panel attorneys, recruits experts to provide the training, and assembles the written materials. Bar Association staff host the trainings, provide videotaping and refreshments, and offer follow-up to individual attorneys.

VLSP staff attorneys also provide individual assistance and support to Panel attorneys, answering legal questions and making referrals to mentor attorneys when needed. An informal protocol has been developed, where attorneys recruited by VLSP staff often turn to the Bar Association office for assistance when problems arise in connection to Panel cases. It's a protocol that has greatly relieved the daily pressures on the Panel's small staff, while providing an added level of "quality assurance" for Panel clients.

The clerical staff at VLSP also handles the case-tracking system for Panel clients. Attorney case logs and client comment forms are reviewed by VLSP's staff attorney, who troubleshoots and monitors problems if they arise. The staff attorney also sits on the Panel's Attorney/Client Relations Committee, insuring continuity and follow-through with respect to any problems that may occur.

In addition to these regular client services, VLSP also assists the Panel in its broader outreach efforts. VLSP has made a special effort to improve services to women with AIDS, by bringing volunteers to the support groups for women with AIDS. We have on-going contact with social workers at the AIDS Foundation who call on us when needed. VLSP has a Social Security clinic through its Homeless Advocacy Project which can assist Panel clients, as well as a Legalization Project for immigrants with HIV.

VLSP has brought to the Panel many volunteers, including specially qualified attorneys who generally do

not volunteer for the Panel. Many Panel attorneys are solo practitioners, such as Alice Philipson. She has handled hundreds of cases involving insurance and confidentiality. But when one of her cases became a high impact case, she herself needed legal assistance. The client in that case had disclosed his HIV status to medical personnel where necessary, but the information was later disclosed inappropriately and was used to deny the client the workers compensation benefits he deserved. Despite the merits of the case, the defendants obtained a summary judgment. Alice knew she needed an appellate attorney, and she called on VLSP.

Recruiting appellate attorneys is one of VLSP's specialties, since few solo practitioners can handle an appeal on their own. It's also an enormous commitment, involving hundreds of hours and lengthy writing of briefs. Elizabeth Summers, a partner at Bien, Summers and Dale, had previously applied to be a VLSP attorney, and so we connected her to Alice to help on this case. As Elizabeth describes it, "I've always been impressed and proud of VLSP's track record, and I finally was in a position to commit to joining VLSP. Working with Alice has been a delightful experience, and I was very grateful to be able to lend my expertise to an AIDS case because of my personal feelings about the AIDS epidemic." Elizabeth prepared the briefs and handled the oral argument, and in January 1991, the Court of Appeal issued its opinion in *Estate of Urbaniak v. Newton*. "What this case accomplished," says Summers, "is that it applies confidentiality laws regarding HIV in a context where the traditional doctor/patient relationship didn't exist, and where the initial disclosure was made to protect the health and safety of others."

Even though the client has since died, Alice is taking the case back to trial court on behalf of his heirs. This is a powerful example of how a solo attorney was matched up with a VLSP attorney, leading to a successful appellate decision that will benefit many future Panel clients. It demonstrates the value of the special partnership between the Panel and VLSP, working together to meet the needs of clients with AIDS-related legal problems. ■

AIDS PANEL BOARD

Profiles

The Panel could not possibly provide the many services it does without the ongoing involvement of its hardworking board. As these profiles demonstrate, the Panel has brought together a wide range of talent from a broad spectrum of the community, working to oversee and support the Panel's activities.

Daniel Chesir is an attorney with the Medical-Legal Department of Kaiser Permanente Medical Care Program. He has worked as a health administrator, and previously was senior counsel for Blue Cross. A resident of San Francisco, he helps with the Panel's Employee Benefits Clinic and serves on the Panel's Employee Benefits Task Force. Daniel is a founding member of Congregation Sha'ar Zahav.

Gary Encinas has been an attorney at Pacific Gas & Electric for more than fourteen years, specializing in employee benefits. He has served countless Panel clients with employee benefits problems, and authored the Employee Benefits section of the Panel's AIDSLaw Manual. A resident of Oakland, Gary joined our Board in 1990 and serves on the Panel's Employee Benefits Task Force.

Susan Gelmis is a staff attorney for the Ninth Circuit Court of Appeals, and also serves on the board of the Bay Area Lawyers for Individual Freedom (BALIF). She has been involved in Panel fundraising and our attorney educational programs. Susan is an active member of Congregation Sha'ar Zahav and the San Francisco Women Lawyers Alliance.

Jeffrey Gibson, who co-chaired our 1990 law firm fundraising efforts, is an attorney with the San Francisco firm of Goldstein & Gellman. Originally from Texas, he previously worked for a Los Angeles firm handling AIDS litigation and lobbying. He has been involved with Panel fundraising efforts since 1989, and also serves as a volunteer for Open Hand.

Barry Graynor, our Secretary, is an attorney with the San Francisco firm of Hosie, Wes, McLaughlin & Sacks specializing in complex business transactions. He has been an attorney and member of the Panel's Board since 1985, and currently is chair of the Fundraising Committee. He lives in San Francisco with his partner of ten years, Rene Martinez.

Ilene Gusfield, our 1991 co-chair, is a Pro Bono Program Developer for the Office of Legal Services, State Bar of California, providing technical assistance to pro bono and legal service programs. Ilene has worked as an attorney with a variety of public interest programs, and also has developed a children's mail order book catalogue for all kinds of families, including lesbian/gay and multi-racial families. She lives in Oakland with her seven-year-old daughter.

Frederick Hertz, the Panel's Treasurer, was one of the Panel's founders in 1982, and served as its volunteer fundraiser for five years. He is a land use attorney as well as a graduate student at U.C. Berkeley's Geography Department. Frederick lives in Oakland, where he also is involved in local historic preservation advocacy efforts with Oakland Heritage Alliance.

Andrea Palash has practiced family law and lesbian/gay civil rights law in the San Francisco Bay Area since 1986. Andrea is the Chair of the Barrister's Club Family Law Section, and has authored numerous articles on HIV issues in relation to child custody disputes. She serves on the Panel's fundraising committee.

Ora Prochovnick is a founding partner of Bayside Legal Advocates, a community law office in San Francisco. Her practice focuses on tenant advocacy, wills and co-parenting and partnership agreements. She graduated from New College School of Law, where she also has been a professor since 1986. She has served many Panel clients over the past seven years, and sits on the Panel's Attorney Relations Committee.

Paul Richard, the Panel's 1991 co-chair, is a litigation associate with the San Francisco office of Brobeck, Phleger & Harrison. Paul is active in the Most Holy Redeemer Parish church of San Francisco, and also

serves on the Committee on Minority Employment for the Bar Association of San Francisco.

Janet Seldon has been a staff attorney with the Volunteer Legal Services Program of the Bar Association of San Francisco since 1986. She devotes a significant amount of her time to Panel operations, overseeing attorney recruitment and training and case tracking. Janet and her partner, a photographer, and their son Jordan live in the Bernal Heights area of San Francisco.

Mark Senick was a founding attorney of the Panel, and has been involved with the Panel continuously since 1983. He has a solo general practice in San Francisco, and served as the Panel's co-chair from 1988 until 1990. Mark also sits on the Board of BALIF.

Paige Wickland, our 1990 co-chair, served on our Board for three years. She is a partner with the San Francisco law firm Kadushin-Fancher-Wickland, specializing in family law and appellate practice. Paige is the author of the supplements to CEB's California Civil Appellate Practice manuals, and when not at her desk, usually can be found working on her home in Sea Ranch.

Carl Wolf, a partner in the law firm of Hammill & Wolf, has been involved with the Panel since 1983. He previously served on the BALIF Board of Directors and on the State Bar's Ethnic Minority Relations Committee. He lives in the small coastside town of El Granada with his partner of 10 years, comic Danny Williams. Carl was recently named to the board of San Francisco Neighborhood Legal Assistance Foundation.

Gary James Wood, one of Panel's founders, served on our board until late 1990. Formerly in private practice, he is currently the Director of Legal Aid of Marin. He also is the co-author of the recently published "AIDS Law for Mental Health Professionals," and is on the Marin County AIDS Commission and the Chronic Immune Deficiency Syndrome Foundation board.

Kathleen Quenneville, our Assistant Treasurer, is counsel to Bank of California in San Francisco. Kathleen keeps our books, and provides general oversight for the Panel's financial operations. Kathleen has assisted in the Panel's financial operations for the past five years, and is a frequent lecturer at conferences organized by the California Banker's Association.

We also welcome our new board members for 1991:

Monica Hernandez is the coordinator of the HIV task force of the Coalition for Immigrant and Refugee Rights and Services in San Francisco, which provides information, referrals and advocacy to immigrants with HIV infection. She also is on our Minority Outreach Project Committee. Monica is active with GELAAM, a local latino lesbian/gay/bisexual political and social organization.

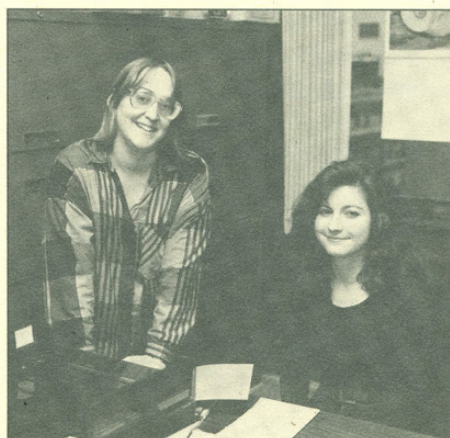
Diane Doubleday McCabe, an employee benefits attorney with the consulting firm of William Mercer Incorporated in San Francisco, has been a Panel attorney for more than four years. She helps coordinate our attorney training, and assists with the Panel's Employee Benefits Task Force. ■



Client Services Director Kristin Chambers



Volunteer Phillip Kuttner



Office Manager Rena Frantz and
Receptionist Mary Ann Pouls

PROJECT OUTREACH: OUR EFFORTS CONTINUE

Jackie Peoples, Project Outreach Director

In 1988, the AIDS Legal Referral Panel undertook a special effort to develop outreach programs to better serve people of color and those in intravenous drug using (IVDU) communities. Our goal was to step outside of our offices, reach where the telephone lines were not connecting, and work directly with social service groups and community groups to improve the delivery of free legal services to underserved people with AIDS. Over the past three years, we have met extensively with groups throughout the Bay Area. We have established legal clinics at a wide variety of locations, bringing the attorneys to the clients where they can most easily be served. And we have worked hard to modify and expand our overall client services to provide a high quality of individualized services to those who need them most.

Now in its third year of operation, the Project has evolved as the nature of the problem has changed. Project Outreach was formerly known as the Minority Outreach Project, and the change in name reflects our awareness of a wider range of clients needing special services. The Project now serves people of color, as well as IVDUs, women and children, people whose first language is other than English, and undocumented workers. As the Project expands, more people with AIDS have been served than ever, and our clients represent the full range of cultural backgrounds, counties of residence, and a broad spectrum of economic levels. This effort insures that the Panel keeps up with the changing face of AIDS, providing vitally needed services to all people affected by the AIDS virus.

Without our assistance, many of the underserved would have suffered greatly. Homes would be lost,

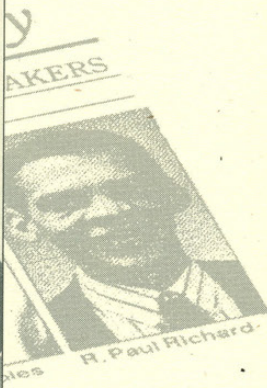
children separated from their families, and benefits denied. As one client told me: "I don't know what I would have done without your help. Everyone looked at me like I was crazy when I told them my story, except you. Now I know that there are people out there who understand." Another client expressed her relief to her bedridden brother, saying: "You can get that will written now. An attorney will come to the house and take care of it...for free!" It is that kind of immediate personal appreciation that lets us know we are doing things right.

Direct services are only one way to serve the community. Last year I also served as Chair of the Alameda County AIDS Advisory Board. In that capacity, I tried to bring the unique issues facing people of color and IVDUs to the forefront. My aim was to bring these issues out into the open, where service providers, decision makers and members of the larger community could discuss them.

One of the most important lessons of the Project is our recognition that the people in need know what they need, even if they don't know how to get it. This is where we come in. If we work together with the clients and their community, we can get the job done together. While successful to date, the Project is far from reaching its goal entirely. There are Bay Area communities still waiting to receive the news that attorneys are available, free of charge, who understand what the clients are dealing with. The Panel has the attorneys ready to serve; our work is to help bring these resources to the clients who need them the most. ■



Jackie Peoples



R. Paul Richard

AIDS Referral Panel a Small Grant Goes

The AIDS Legal Referral Panel's Outreach Project serves those who are largely ignored by other AIDS organizations and the legal community. Recently, the Outreach Project received a \$1,500 Horizons Foundation Contra Costa County.

The Legal Panel started the Outreach Project three years ago when the staff discovered that those who were predominantly white gay males.

"We realized more than this particular AIDS include the demographics of the Outreach Project. We also wanted to reach underserved people."

The project targets those with HIV infections who are often not served by the legal community, including minorities, those who speak English as a second language, undocumented aliens, women and children, and intravenous drug users. Peoples, a 1988 New College of Califor-

"I go where clients already are and meet them through existing relationships," said Peoples. "It's far less in dating this way."

R. Paul Richard, cochairman of the AIDS Legal Referral Panel and a member of the Outreach Project's community since May, said often that is legal to call an office that is legal communities that legal problems as white people's problems at San Francisco, Philieger & H. 1976 Georgetown University graduate. A large part of the Outreach Project's mission is to show people the ability on their own's a large

This is the four... "That the grant has received the substantial amount of money the cost of goes a long way by covering the cost of publishing brochures as well as staff trav-

1990 FINANCIAL REPORT

Income

Atkinson Foundation	5,000
Horizons Foundation	1,600
Irvine Foundation	30,000
Laine Family Foundation	2,500
Northern California Grantmakers	20,000
San Francisco Foundation	25,000
United Way AIDS Crisis Fund	25,000
United Way Donor Designations	1,739
van Loben Sels Foundation	3,000
Friends of Oscar™/Academy of Friends	15,555
State Bar Trust Fund	19,132
Corporations	9,475
Law Firms	37,245
Individual donations	10,702
Bequests	12,327
Attorneys fees tithed	2,541
Earned income	3,038
Interest earned	4,801
Total income	\$228,655

Expenses

Administrative salaries & benefits	138,041
Office rent & expenses	37,777
Publications	6,668
Development expenses	9,458
Malpractice insurance	6,878
Other expenses	1,357
Total expenses	\$200,179

Financial Statement

Cash on hand: January 1, 1990	102,567
Expenses 1990	-200,179
Income 1990	228,655
Cash on hand January 1, 1991	\$131,043

1990 Law Firm Reception

WITH SPECIAL GUEST
LA Law's Susan Rullian

Saturday, November 10, 1990
6:00pm to 8:00pm

At the home of Supervisor Angela Alioto
2606 Pacific Avenue
at Pierce
San Francisco, California

MUSIC

Scott Hepper, Classical Piano

SAN FRANCISCO Daily Journal

SERVING THE BAY AREA LEGAL COMMUNITY SINCE 1893

AIDS Legal Referral Panel Raises \$52,000 at Annual Law Firm Reception and Honors Volunteers

The AIDS Legal Referral Panel of the Bay Area held its annual law firm fund-raiser at the home of San Francisco Supervisor Angela Alioto. The reception was attended by more than 750 representatives of the Bay Area legal community and raised \$52,000. Four law firms were responsible for the majority of the contributions. Morrison & Foerster donated \$10,000. Other top contributors included the law firms of Braun & Martel, and

the reason I went into detail regarding my latest onset of illness is that I felt it was perfectly illustrative of a problem so many people with uncontrollable nature and course of the disease. But it's precisely at that point of vulnerability that agencies like ALARP become most valuable and essential. In being able to provide a variety of different kinds of legal help to many people with AIDS, the ALARP performs a truly critical function: it helps to offset at least some small, and often not so predictable, which AIDS so often imposes on people's lives. In my own volunteer experience, I have seen clients who initially were disoriented, frightened, angry and become — and all for good reason — something more before AIDS. It was something that knocked their feet out from under them. At least the ALARP was there to help them get back on their feet.

TREASURER'S REPORT

Frederick Hertz, Treasurer

The AIDS Panel begins each year wondering whether it will be able to raise the funds necessary to keep its program alive. Our staff handles the referrals, coordinates the volunteers, keeps track of referrals, and generates the written material needed by our attorneys. All of this takes time, and accordingly, the staff salaries and benefits accounted for \$138,041 of the 1990 budget, approximately 70% of our total expenses. Our other major expense is rent and office overhead. We were fortunate this year to move into larger quarters leased from Pillsbury, Madison & Sutro, and thanks to our reliance upon donated services and Pillsbury's furniture, our office-related expenses were only \$37,777.

Other expenses this year went for brochures, the malpractice policy for our attorneys, and fundraising-related expenses. We are pleased that, even with a grantwriter, our development costs were less than 10% of our budget. Our cost for providing referrals is approximately \$100 per referral — excellent leverage in that the donated services are usually worth in excess of \$750. In addition, we provide thousands of additional clients with general information through our responses to telephone inquiries and our detailed educational brochures.

Our fundraising efforts have kept pace with these demands. In 1990 we received renewal grants from three major foundation supporters, the San Francisco, James Irvine and van Loben Sels foundations. These funders have supported our Panel since its inception, and their support has been vitally important. This year we received several grants for special projects: The Atkinson Foundation for San Mateo County outreach, Horizons Foundation (through its Bay CableVision Fund) for Contra Costa and Berkeley services, and an attorney training grant from the Laine Family Foundation.

We also benefited from several special regional programs. Our Community Care Project received a renewal grant from Northern California Grantmaker's AIDS Task Force. The Panel was a beneficiary of the

Friends of Oscar™/Academy of Friends lavish benefit. Our minority outreach efforts were supported again by United Way's AIDS Crisis Fund, and the Panel received an allocation from the State Bar of California's Attorney Trust Fund program. Our participation in these programs is important not only because of the financial value, but also for the recognition that our participation represents. The AIDS Panel clearly is an established and well-respected regional AIDS service program. In early 1991, we were awarded a grant from the local Ryan White "CARE" funds, for our insurance reimbursement and financial management programs.

Thanks in great part to the efforts of our Development Officer Kevin Walsh, the Panel received significant corporate support this year as well. And, thanks to a recommendation by a Security Pacific Trust officer, we received a large bequest from the estate of Vernon Widmark.

Finally, and most dramatically, the Panel received nearly one fourth of its income this past year from attorney, legal staff and law firm donations. Our fall fundraiser was held this year at Supervisor Angela Alioto's home, with a wonderful buffet catered by Blue Heron of Oakland and featuring "L.A. Law" star Susan Ruttan as our special guest. We raised more than \$52,000, more than 90% of which went directly to serve Panel clients. The fundraiser, organized by Jeffrey Gibson and Paul Richard of our Board, was a wonderful display of the strong support the Panel receives from the local legal community. In this regard, we want to give our special thanks again this year to the attorneys and staff of Morrison & Foerster's San Francisco office, who gave generously to our appeal for donations. ■

SETTLEMENT BENEFITS AIDS GROUP

The AIDS Legal Referral Panel is one of five Bay Area AIDS service groups to benefit from a bequest stemming from the settlement of a 1987 housing discrimination suit.

The late David L. Cole, a San Francisco computer programmer, specified in his will that part of a \$150,000 settlement be turned over to the referral panel and four other AIDS groups: the AIDS Emergency Fund, Project Open Hand, Shanti Project and the San Francisco AIDS Foundation.

According to one of Cole's lawyers, Paul Thurston of the Thurston-Schott Law Offices of San Francisco, each group will receive about \$9,000. Additionally, Thurston said he and co-counsel Frederick Hertz, a San Francisco solo practitioner, are donating 15 percent of the attorney fees to the service groups.

Cole's suit, *Cole v. Magkiz*, 007962, dated July 1988, was filed in San Francisco Superior Court after Cole, who died two months after discovering he had AIDS, told his attorney that he had never said

The AIDS Legal Referral Panel gratefully acknowledges and thanks its 1990 Donors

"The reception generated about \$48,000, or about 25 percent of the panel's 1991 budget," said Jeffrey Gibson, an associate with San Francisco's Goldstein & Gellman and a spokesman for the Referral Panel.

-DAILY JOURNAL

Foundations

Atkinson Foundation
Friends of Oscar™ - Academy of Friends
The Horizons Foundation - Bay Cablevision Fund
The James Irvine Foundation
Laine Family Foundation
Northern California Grantmakers, AIDS Task Force
The San Francisco Foundation
United Way of the Bay Area, AIDS Crisis Fund
Ernst and Eleanor van Loben Sels Foundation

Corporate Donors

Bank of California
Bay View Federal Bank
The Clorox Company Foundation
Kaiser Foundation Health Plan
Matthew Bender & Company
Pacific Gas & Electric
Walgreens Company

Law Firms

Broad, Schulz, Larson & Wineberg
Brobeck, Phleger & Harrison
Bronson, Bronson & McKinnon
Cooley, Godward, Castro, Huddleson & Tatum
Cullum & Sena
Epstein, Becker, Stromberg & Green
Farella, Braun & Martel
The Staff and Attorneys of Farella, Braun & Martel
Goldfarb & Lipman
Gordon & Rees
Graham & James
The Staff and Attorneys of Graham & James
Hanson, Bridgett, Marcus, Vlahos & Rudy
Heller, Ehrman, White & McAuliffe
Hosie, Wes, McLaughlin & Sacks
Keker & Brockett
Landels, Ripley & Diamond
Major, Wilson & Africa: Attorney Search Consultants
McCutchen, Doyle, Brown & Enersen
The Morrison & Foerster Foundation
The Staff and Attorneys of Morrison & Foerster
Pettit & Martin
Pillsbury, Madison & Sutro
Rogers, Joseph, O'Donnell & Quinn
Saperstein, Seligman & Mayeda
Schacter, Kristoff, Ross, Sprague & Curiale
Stoner & Welsh

L.A. Law' Joins AIDS Group In Honoring Contributions

By YVONNE SCHIBSTED
Daily Journal Staff Reporter

Calling it legal work of the heart, Susan Rutten, who plays the legal secretary Roxanne on NBC television's "L.A. Law," joined members of the Bay Area legal community last week-end at the AIDS Legal Referral Panel's 1990 Law Firm Reception, honoring outstanding probono contributions.

Amid applause Saturday, Sue Tuskus, a San Mateo sole practitioner, was honored as attorney volunteer of the year; David McColloch, with Morrison & Foerster, was honored as paralegal of the year; and Brobeck, Phleger & Harrison was recognized as firm of the year. Karen Peteros, an associate with the San Francisco firm and a member of the AIDS panel, accepted the award for Brobeck.

Rutten, who has been active in AIDS projects in Los Angeles, presented the awards.

"I encourage people to volunteer their time and to give," she said, noting that in the case of "L.A. Law," the show's production each year

we should do, but something we have to do," said McColloch, who has left Morrison & Foerster because his HIV infection left him unable to work.

The reception generated about \$48,000, or about 25 percent of panel's 1991 budget, said Jeffrey G. Gibson, an associate with San Francisco's Goldstein & Gellman and a spokesman for the referral panel.

"I think it [donations] shows that we are supported by the majority of San Francisco law firms with respect to the issue of AIDS," Gibson said.

About 200 people attended the event at the home of San Francisco Supervisor Angela Alioto.

With the help of 400 volunteer attorneys, paralegals, notaries and legal secretaries, the AIDS Legal Referral Panel served 1,750 clients in 1989 by doing such things as writing wills. In that year, nearly 1,000 new cases of AIDS were reported in San Francisco County.

The legal aid program was founded in 1982 as a committee of Bay Area Lawyers for Individual Freedom.

Staff reporter Jessica Givyn contributed to this report.

Individual Donors

Randall Alfred	Thomas Gee	Randolph Langenbach	Dennis Sabus
Alvin Baum Jr.	James Goldsmith	Edmund Manwell	Alan Seidman
Susan Blachman	Joseph & Irma Gusfield	Norma Mautner	James Shay
Boyd Blackburn	Ian Harding	Paul Melodia	James W. Smith
Eileen Blumenthal	Mary Jo Hart	Drew Metcalfe	Damian Smyth
Dr. Steven Borkovic	Patricia Hastings	Paul J. Meyer	Claire Springs
Martin Bunzl	Elizabeth Hendrickson	Eric Miller	Catherine Steane
Anthony Candelaria	Frederick Hertz	Terry Mohnney	Thomas Steel
Lawrence Christiansen	Marcus & Lorraine Hertz	Christopher Mountain	David Taylor
Jeffrey Cohen	James C. Hormel	Daniel Murphy	Jesse Taylor
Bruce Cronander	John Hummel	Lisa Nerenberg	Christopher Troxell
Robert Darling	Daniel Jackson	Derek Ow	Gilda Turitz
Candace Davenport	Harold Jackson	Walter Palmer	George Tuttle
Bruce Day	Rex Jones	Vernon Phelps	J.J. Van Giersbergen
Naomi Doerr	Robert Kane	Alice Philipson	Anthony Vettese
Rudolph Driscoll	Christopher Kenward	Anson Reinhart	Robert Marshall Walker
Robert Evans	Ross Kesinger	Mr. & Mrs. Jerome Roth	Albert Walner
Michael Fiumara	Susan King	Wendy Roudier	Edward Wes
Howard Freedland			

Memorial Contributions

The Estate of Lawrence "Skip" Lewis

Darrell Roberts, in memory of Max Roberts

Jeanne Steinbach, in memory of Jeffrey Steinbach

The Estate of Vernon Dale Widmark

In memory of Fred Rosenberg:

Francoise King, Melinda Basker, Doron Weinberg,

Charlotte Fishman, Richard Boles, Nandor Vadas, Helene Marchant

Donated Services

Accounting Services by Price Waterhouse, San Francisco Office

Bookkeeping Services by Yvonne Chang, Winterland Productions

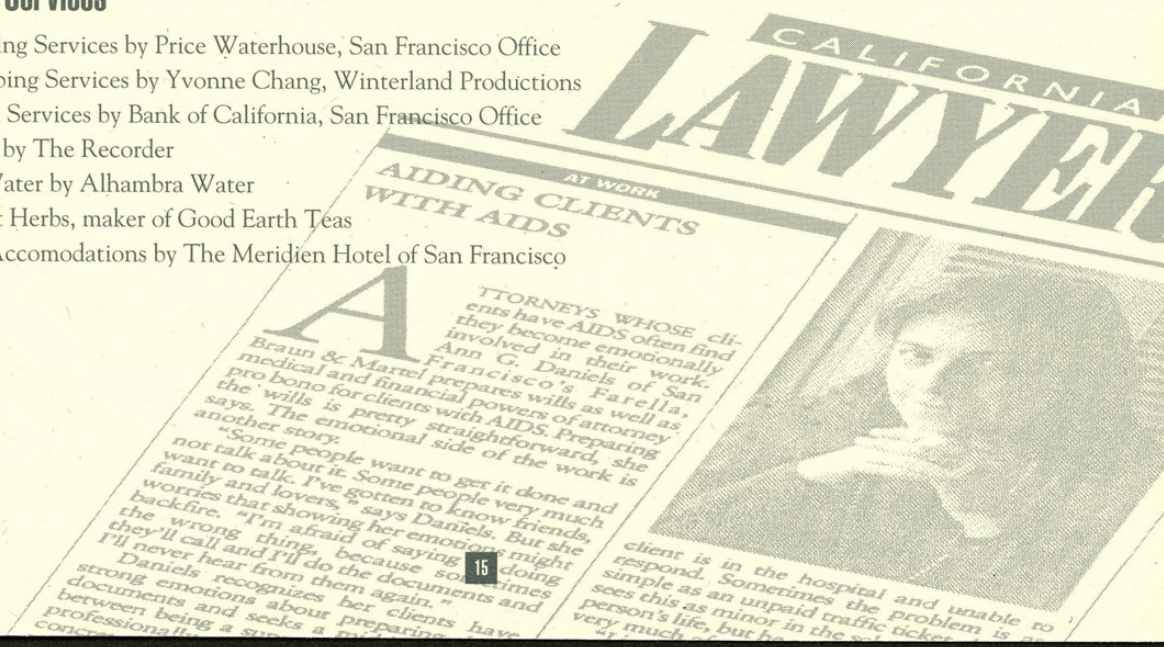
Financial Services by Bank of California, San Francisco Office

Publicity by The Recorder

Spring Water by Alhambra Water

Wildcraft Herbs, maker of Good Earth Teas

Benefit Accomodations by The Meridien Hotel of San Francisco



AIDS LEGAL REFERRAL PANEL

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Suite 1103
San Francisco,
CA 94104
(415) 291-5454

*An independent non-profit
organization supported by
Bay Area Lawyers for
Individual Freedom (BALIF)
and Volunteer Legal
Services Program of the Bar
Association of San
Francisco (VLSP/BASF).*

AIDS Legal Referral Panel Board of Directors

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Carl Wolf
Gary James Wood**

Kathleen Quenneville, Assistant Treasurer (ex-officio)

* term began January 1991

** term expired December 1990

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Kristin Chambers, Client Services Director
Jackie Peoples, Project Outreach Director
Rena Frantz, Office Manager
Mary Ann Pouls, Receptionist
Kevin Walsh, Development Officer

*The recycled paper for this Annual Report
was generously donated by the San Francisco office of Simpson Paper;
our thanks to Susan Taylor for making this gift possible.
Design and production was donated in part by Caramia Design of San Francisco,
photography by Savage Photography, and printing by Inkworks of Berkeley.
Andrea Palash and Frederick Hertz coordinated the preparation of the Report.*

The clients of the AIDS Legal Referral Panel receive a wide variety of services:

Through our telephone referral services, Panel clients are provided with a volunteer attorney who, free of charge, will meet with them, draft powers of attorney and a simple will, and provide assistance for whatever estate planning problems they are dealing with.

Through our evening insurance and employee benefits clinics, clients can receive immediate counseling and assistance with regard to health and life insurance, disability coverage, and employment related problems.

Through our telephone referral services, the Panel links clients with an attorney — free if the client is indigent and at very low cost if the client can afford to pay — for assistance with housing problems, insurance claims and social security benefits, financial problems, and whatever family, relationship or personal dilemmas they face. The panel is a State Bar Certified Lawyer Referral Service.

Through our outreach clinics, people of color and intravenous drug users with AIDS can meet with an advocate, who will either assist them immediately or will work closely with them to insure that they obtain the services of a qualified attorney.

The Panel serves thousands of others in a wide variety of ways:

Our staff responds to hundreds of telephone inquiries each month, providing referrals, information about benefits programs, and clarification of legal rights and available legal resources.

Our staff and Board have written training manuals and educational brochures used by attorneys, clients and program directors throughout the country.

Our Director founded and continues to assist with a statewide organization of AIDS legal service programs, and the Panel continues to provide technical assistance and guidance to newly-formed panels.

Our staff and members of our Board testify locally and statewide, to provide statistics and analysis in support of efforts to improve the legal status of persons with AIDS in California.

Our attorneys speak at public forums throughout the area on legal issues facing people with AIDS, including the difficult topics of AIDS dementia, experimental drug treatments, suicide decisions, and family and estate conflicts.

Our staff provides in-service training on legal issues facing those with AIDS for local hospitals, nursing homes, social service programs, and social and political organizations. ■

ALRP

A I D S L E G A L R E F E R R A L P A N E L

From the Co-Chairs of the AIDS Legal Referral Panel

**PAIGE WICKLAND and
MARK SENICK**

The AIDS Legal Referral Panel was founded in 1982 as a committee of Bay Area Lawyers for Individual Freedom (BALIF), a gay and lesbian Bar Association. In 1986 the Bar Association of San Francisco's Volunteer Legal Services Program (VLSP) became an important partner in the Panel's work. As the Panel's budget and project size grew, the need for a single board with a single focus as an AIDS service project became more important, and on January 1, 1990, the Panel incorporated with a new name, "The AIDS Legal Referral Panel of the San Francisco Bay Area." The Panel will retain a close relationship with the sponsoring organizations, as BALIF and the San

Francisco Bar Association VLSP will be submitting nominations to the Panel's board. We anticipate that our program, our board, and our services will remain unchanged with the new organizational format, and we will continue our close ties to the gay and lesbian community as well as the San Francisco organized bar.

In 1989, the Panel served 1,750 clients. The Panel utilized services of 400 volunteer attorneys, paralegals, notaries and legal secretaries. In addition, the Panel and its staff responded to nearly 3,000 general inquiries over the year. As we head into the new year, we anticipate that client demands will continue to increase, and as our clients are living longer their legal needs are growing and changing. Discrimination complaints are dropping, but problems with insurance, employment benefits, and social security matters are increasing. We continue to recruit and train a wonderful panel of dedicated, skilled volunteer attorneys, and are confident that we can and will meet all of the challenges we face.

HIV infection continues to increase. In 1989 almost 1,000 new cases of AIDS were reported in San Francisco County alone. A large increase was also reported in Alameda County. Many thousands more have serious HIV related conditions. Of these, the great majority are gay men, who are largely left unprotected by a legal system which is not geared to their needs, specifically with respect to their relationships with domestic partners. Consequently, wills and powers of attorney are extremely important to people with HIV disease. Almost half of the Panel's work was in this area. Additionally, infection with the HIV virus often intensifies problems that many gay men already face, such as discrimination in employment and housing. Although such cases decreased this past year, they still constituted 15% of the panel's work.

The Panel created important new programs and participated in exciting projects this year. We have established a once-a-week insurance and employee benefits clinic, where persons with HIV infection can receive free legal assistance on their insurance,

pension, COBRA conversion and other employee benefits problems, through a clinic where individuals meet privately with an attorney for 45-minute sessions. In association with People With AIDS/S.F., the Panel is hosting a series of community forums addressing such important issues as coping with HIV dementia, new problems in the criminal justice systems affecting people with AIDS, HIV and U.S. Immigration, and how to protect insurance and employee benefits.

In 1989 the Panel also worked with an association of 15 local AIDS legal referral services, called State AIDS Legal Services Association (SALSA). Together, the associations released their first group publication in February 1990, developed by the Panel. The brochure, entitled "JUST SAY NO! to Creditors, or the Bill Collector Always Rings Twice", is a self-help brochure intended to assist people with HIV infection through their financial difficulties. The Panel is embarking on a number of exciting new projects in 1990, including the creation of a mentor panel of attorneys with expertise in specialized areas of the law such as social security, who work with volunteer panel attorneys and consult on difficult cases. We have also received a grant to update the AIDSLaw manual that we first created in 1988 when the Panel hosted the national AIDSLaw conference.

The Minority Outreach Project continues to forge important links between our Panel and minority communities in the Bay Area. The Project has developed a number of walk-in clinics to reach those clients for whom a telephone referral service may be inadequate. The Project's success in outreach means that we can spend more time now keeping the quality high on our existing clinics and projects, rather than developing new outreach efforts.

Our law firm fund raiser last fall was a great success, and we have received a number of renewal grants. For the first time, our foundation support is less than 50% of our funding, demonstrating that we are receiving

Continued on page 5

Report from The Bar Association of San Francisco

JANET SELDON,
Special Projects Coordinating Attorney
Volunteer Legal Services Program

This year will begin the fourth year of VLSP's partnership with the AIDS Legal Referral Panel. As part of the ALRP team, much of what I do involves the day-to-day projects which keep the Panel running smoothly. VLSP often functions as a satellite office for ALRP.

In 1989 VLSP continued its commitment to provide assistance in the areas of training, attorney recruitment and supervision, attorney-client relations, and videotaping and replay of training sessions for new volunteers. New undertakings in 1989 have included fine-tuning and computerizing our case-tracking methods, working with the newly organized States AIDS Legal Services Association (SALSA), as well as developing a new committee to work on attorney-client relations.

As the years go by the caseload expands and changes with ever-growing complexity, and the demand on our volunteer attorneys remains strong. Yet, I am continually told by our volunteers that this is by far the most rewarding work that they have done in their professional lives as attorneys. In 1989 many VLSP attorneys have been publicly honored for their work on the panel in such publications as *FOCUS* magazine, *The Recorder*, and *California Lawyer*.

From our clients' standpoint they are tremendously grateful for the assistance they have received. Quotes from our Client Comments forms eloquently express how important our services are to their lives. Reading their words, or those of their families, brings home what a difference the volunteers' efforts and caring have made. One client wrote, "The service you are providing is invaluable. I can't thank you enough. It is such a helpless feeling when you feel you are in this alone. Your service of providing qualified professionals is literally prolonging my life. Thank you." This particular client was having problems getting his insurance company to pay for life-saving treatments. Another comment form was written by the executor of a client's will: "We just can't say enough about the assistance provided by Ms. Daniels during this time. It was a difficult time for us, especially after Jim's passing and his family arrived. Because his legal documents were in order, any contentious dealings with the family were minimal, as Jim's wishes were quite clear."

Receiving these kinds of comments each day enables us to continue to have the energy and high spirits to ensure that this important project continues to serve all clients in San Francisco who are affected by the AIDS epidemic.

From the Administrator of the AIDS Legal Referral Panel

CLINT HOCKENBERRY

The sterile word "case" hardly conveys the often conflicting emotions at play when clients call the AIDS Legal Referral Panel. People with HIV infection only reluctantly seek legal counsel because they have nowhere else to go. Many dislike the legal system and distrust lawyers. Nevertheless, people with AIDS, physically weak and vulnerable, need an attorney to sort through seemingly irreconcilable conflicts. Sometimes it is to compel an insurance company to abide by its contractual obligations and pay for critical treatments. Other times it is to force an irresponsible landlord to turn on the heat or to stop a creditor from continuing heavy-handed collection tactics. Without the assistance of an AIDS Legal Referral Panel volunteer, many people with AIDS simply would not be able to resolve many of the problems they face.

As one client wrote: "When I called the AIDS Legal Referral Panel, I was stressed and angry. You helped me, and I'm very pleased to the utmost with my lawyers. I just want you to know that you opened my heart. I now am seeing 'good' again."

The AIDS Legal Referral Panel worked on expanding legal services to underserved populations over the last year. The Panel was instrumental in forming SALSA in order to assist new AIDS legal programs and to serve persons with HIV-infection in rural California. In addition, the Panel's Minority Outreach Project organized legal clinics in the East Bay in an attempt to reach IVDU and people of color communities. Finally, responding to a spiralling caseload, the Panel opened a weekly clinic on insurance

1989 Annual Summary of Cases

Types of Cases Handled

	J	F	M	A	M	J	J	A	S	O	N	D	TOTAL	
	145	121	144	130	135	164	147	164	136	139	162	149	1736	
Wills, DPAs	74	66	73	60	72	82	54	77	61	75	67	78	839	(48.3%)
Probate	5	1	4	2	4	3	2	3	2	1	3	5	35	(2.0%)
Employment	7	5	7	10	7	5	16	11	8	12	16	4	108	(6.2%)
Housing	10	9	13	9	7	14	13	14	16	9	11	10	135	(7.8%)
Govt. Benefits	6	5	4	9	10	11	5	9	9	7	12	5	92	(5.3%)
Bankruptcy	16	11	9	10	14	9	13	16	8	3	10	6	125	(7.2%)
Insurance	11	14	14	12	7	9	21	7	13	16	18	22	164	(9.4%)
Criminal	7	2	9	8	7	7	5	3	1	4	4	3	60	(3.5%)
Family	1	1	3	1	0	4	3	4	1	1	3	3	25	(1.4%)
Health	1	1	1	1	2	5	5	6	2	3	5	2	34	(2.0%)
Military	0	0	0	1	0	0	0	1	1	0	0	0	3	(.2%)
Tort	0	1	1	1	1	3	1	4	4	1	2	0	19	(1.2%)
Public Accom.	2	1	0	0	0	1	0	0	1	0	0	0	5	(.2%)
Workers' Comp.	0	0	0	2	1	2	1	1	0	1	1	1	10	(.6%)
Tax	1	3	2	1	1	2	2	4	4	4	4	1	29	(1.7%)
Conservatorship	1	0	0	2	0	0	1	0	0	1	0	0	5	(.2%)
Immigration	0	0	0	1	1	2	4	2	2	0	1	2	15	(.9%)
Contracts	1	0	2	0	1	3	1	2	2	0	0	1	13	(.7%)
Other	2	1	2	0	0	2	0	0	1	1	5	6	20	(1.2%)

Client's Income

\$ 7,000	90	68	76	80	83	80	72	95	73	64	81	62	924	(63.4%)
\$ 7,000-\$12,000	5	14	9	9	6	21	10	15	4	15	18	17	143	(9.8%)
\$12,000-\$20,000	15	11	14	12	19	12	15	11	13	13	13	14	162	(11.1%)
\$20,000-\$30,000	8	6	14	4	6	14	8	9	11	12	9	8	109	(7.5%)
\$30,000	12	6	8	7	6	13	8	9	11	11	12	17	120	(8.2%)
													1458	(100%)

Client's Race

Caucasian	111	81	98	89	99	120	93	115	86	97	101	104	1194	(81.9%)
Hispanic	9	12	13	9	13	8	7	13	13	8	16	2	123	(8.4%)
Black	6	10	5	14	5	8	9	9	11	9	15	9	110	(7.6%)
Asian	1	2	1	0	0	1	2	0	1	1	0	0	9	(0.6%)
Native American	3	0	1	0	2	2	2	0	0	0	0	2	12	(0.6%)
Pacific Islander	0	0	3	0	1	1	0	2	1	0	1	1	10	(0.7%)
													1458	(100%)

and employee benefits. Finally, the Panel continued its historic commitment to protect the rights of lesbians and gay men who often face dual discrimination based on sexual orientation and AIDS.

With the advent of promising new treatments, people with HIV infection

are living longer and living better. Unfortunately, they are also facing new legal challenges and increasingly need the strong advocacy of legal counsel. The AIDS Legal Referral Panel, part of the San Francisco model of essential AIDS services, will continue to defend the rights of persons with HIV infection as they struggle for their lives.

Clients by County

San Francisco	1333	78.9%
Alameda	180	10.7%
Contra Costa	77	4.6%
San Mateo	49	2.9%
Marin	27	1.6%
Sonoma	15	.9%
Solano	8	.5%

1989 Financial Report

FREDERICK HERTZ, Treasurer

The fundraising successes of the AIDS Panel in 1989 were significant in several important respects. For the first time since our efforts began in 1985, non-foundation revenues exceeded 50% of our annual income. Reducing our dependence upon foundations is an essential component of our financial survival as an organization, and this past year we have been especially successful in raising funds from law firms, special projects, and individual donations. In addition, we have continued with our reliance upon volunteer labor and donated resources wherever possible, reducing our dependence upon cash donations. Despite the increasing client demands and the growing complexity of our service delivery programs, our basic operating budget has remained lean.

Several local foundations have been critical to the success of the AIDS Panel, and we were fortunate to receive renewal grants from our strongest supporters. This is important, as these foundations have watched our response to the epidemic for five years, and their confidence in our project means a great deal to us. The AIDS Panel received grants in 1989 from the Ernst and Eleanor Van Loben Sels Foundation, the San Francisco Foundation, and the James Irvine Foundation, all of which have been long term supporters of the Panel. We received new grants this year from the Colin Higgins Foundation, Horizons Foundation, and the Nu Lambda Trust. The grant from the San Francisco Foundation included special funds for long range planning, and we benefitted from the excellent services of Harder+Kibbe in an analysis of our program and the preliminary development of a long range plan. In early 1990 the James Irvine Foundation renewed its major grant for two years, with funding for the salary of our administrative assistant.

The AIDS Panel also benefitted this year from grants from several joint local funding efforts. We are very proud of having received a grant from

Northern California Grantmakers AIDS Task Force, which was renewed again in early 1990. This award resulted from a joint proposal with one of our sponsors, the Bar Association of San Francisco's Volunteer Legal Services Program. For the second year, our Minority Outreach Project received a major grant from the United Way of the Bay Area's AIDS Crisis Fund. And, for the first time in 1989, the Panel received funding from the State Bar Trust Fund program of the State Bar of California. We are seeking renewal funding from each of these important resources again this year.

One of the Panel's consistent efforts has been to demonstrate to the public and to the social service community the value of legal services as part of a broad client support system. In recognition of the importance of our work, we were selected in 1988 as a beneficiary of the local showing of the Names Project's AIDS Quilt. The AIDS Panel has been chosen this year as a beneficiary of the important San Francisco Friends of Oscar (newly renamed "Academy of Friends") benefit. These events are critical, not only for the funds they generate, but also for the broad exposure they give our work throughout the community.

This year marked a dramatic increase in the amount of funds received from the legal community. Because of the numbers of attorneys who volunteer their time, law firm fundraising has never been easy. Thanks to an enthusiastic hard-working committee, however, our 1989 Law Firm Fundraiser was a tremendous success. We enjoyed a beautiful venue at the new offices of Bronson, Bronson & McKinnon, and a dozen local caterers donated lavish refreshments to round out the event. Several local firms, including Morrison & Foerster, Farella Braun & Martel, Graham & James, and Pillsbury, Madison & Sutro, matched the individual donations of their attorneys, and numerous firms made major donations and helped solicit funds from their individual attorneys. We

raised more than \$34,000 from our September event.

A few donations this year were of particular personal significance to me. David Cole, who was represented by Paul Thurston and myself in a housing discrimination case, died in late 1988. He left a significant portion of the proceeds of this lawsuit to several AIDS-service projects, including the AIDS Panel. We also received numerous donations from friends and family members of deceased clients, and as painful as each of these deaths always are, it is extremely meaningful that some of our clients and their families have chosen to recognize our work by their donations.

This was the first year that we sought donations from local corporations, and we are pleased with the results of our effort. Our 1988 Annual Report was funded by donations from Chevron and Pacific Gas & Electric, and Matthew Bender made a donation to our Minority Outreach Project. And, thanks to the excellent work of our administrative assistant Rena Franz and volunteer Wally Stanford, our office operations have benefitted tremendously from a major donation of a multi-station computer system from Hewlett Packard. Local law firms also have aided our efforts, by donating the time of their support staff, their photocopying and postage services, and by allowing us the use of their facilities for our programs and meetings. Many of the members of our Board of Directors have similarly contributed their office space and support staff, in addition to an enormous number of hours of their personal time. It would have been difficult for us to respond to our clients' needs without these non-monetary contributions.

As in prior years, our budget is devoted primarily to paying the salaries and benefits of our hard working staff, our Administrator, Administrative Assistant, and Minority Outreach Director. We have added several part-time work-study law students to help out in our office, and we

increased our outreach expenses to pay for fundraising efforts and expanded publicity for the Panel's activities. In most other respects, our rent, telephone, copying and postage and general office expenses remain similar to our 1988 expenses. Our total 1989 expenses were \$144,242, of which approximately \$105,000 went for staff salaries and benefits, \$5,000 for our long range planning efforts, and the remainder for rent, insurance, office supplies and equipment.

Continued from page 1

support from the legal community, individuals, and former clients. At our annual reception honoring panel volunteers, held in September of 1989, the Panel formally honored AIDS Panel volunteers, the San Francisco Mayor's HIV Task Force, and the San Francisco office of Morrison & Foerster. In addition, a special presentation of the State Bar President's Pro Bono Service Award for District 4 was presented to Gary James Wood, an AIDS Panel volunteer and a member of the Panel's board of directors.

On behalf of all the members of the new board of directors, and on behalf of all of our present and future clients, we thank you for your continued participation in our efforts and your help in allowing us to meet the new challenges facing us.

Summary Of Financial Condition

December 31, 1989

Cash on hand 1/1/89	66,831
Income 1989	179,122
Expenses 1989	144,242
Cash on hand 1/1/90	101,711
Committed income 1990	75,663
FUNDS AVAILABLE FOR 1990	<u>177,374</u>

INCOME RECEIVED 1989

Foundations	
Van Loben Sels	5,000
San Francisco	25,000
James Irvine	20,000
Colin Higgins	5,000
Nu Lambda Trust	4,000
Northern Ca. Grant	20,500
Horizons	2,000
TOTAL FOUNDATIONS	<u>81,500</u>

Special projects	
United Way	25,000
Special events	3,087
State Bar Trust Fund	4,662

Corporate donors	3,400
Law Firms	29,935
Bequests	8,919
Individual Donations	13,675
Attorneys fees	1,942
Earned Income	3,425
Interest earned	3,567
TOTAL INCOME 1989	<u>179,122</u>

EXPENSES 1989

Salaries and benefits	105,657
Minority Outreach expenses	4,057
Outreach & fundraising	8,933
Insurance	4,739
Equipment & supplies	6,800
Rent & telephone	9,011
Planner	5,045
TOTAL EXPENSES 1989	<u>\$144,242</u>

The Minority Outreach Project

JACKIE PEOPLES
Project Director

In recent years, the AIDS Legal Referral Panel has attempted to widen its geographic and cultural horizons to serve more people of color and intravenous drug users (IVDU) affected by the AIDS virus. The Panel has successfully achieved this goal through the Minority Outreach Project. The Project is funded in large part by a grant from the United Way's AIDS Crisis Fund, and began operating in October 1988.

The Project grew out of a series of meetings with members of the Black, Hispanic, Asian and IVDU communities. For several months the Project assessed the needs of the targeted communities, and developed an awareness of the services offered by the AIDS Legal Referral Panel. The consensus was that the AIDS Panel had to be more visible, and the concept of the "legal clinic" was born.

The clinic is a place where an attorney and client meet directly to discuss the client's legal issue. The uniqueness of the clinic, however, is that the meeting takes place in the client's neighborhood. The Project Director arranges to have two of the Panel's volunteer attorneys meet at the office of an AIDS service organization such as the Contra Costa AIDS Task Force, or the East Bay AIDS project. The attorney and client meet, discuss the case, and decide what direction to take from there.

Another form of clinic is one where the Project Director agrees to be at the office of an AIDS service organization, for several hours, on a specified day of the week or month. She determines whether a legal issue exists. If she feels a referral is indicated, she gives the client the name and phone number of a volunteer attorney who has expertise in the relevant area of law. In many in-

stances, the Director will contact the attorney first to be certain that he/she has the time and ability to handle the case.

Presently, the Minority Outreach Project works with the Contra Costa AIDS Taskforce, the East Bay AIDS Project, the Charles Houston Bar Association's Judicare Project, the Alameda Bar Association's Volunteer Legal Services Corporation, Mano-A-Mano, the Westside AIDS Case Management Program, the Oakland Veterans Administration Outpatient Clinic, the Asian AIDS Project, and the Richmond Health Center. Not all of the agencies have clinic sites, but serve as places for referrals when it is inappropriate to refer a client to one of our volunteer attorneys.

The primary goal for the Minority Outreach Project, in addition to improving the quality of the Panel's service, is to recruit, and train, more volunteer attorneys in the five Bay Area counties to serve these populations. Recent epidemiological data shows a tremendous growth in the AIDS population in communities of color, and from IVDUs. These communities need attorneys who have expertise in housing discrimination, family law, public benefits, and criminal law. Recruitment for people of color is encouraged, because in some instances it is preferable to be of a community, as well as for a community, to be effective in serving that community.

The AIDS Legal Referral Panel gratefully acknowledges the following donors:

Foundations

The San Francisco Foundation
United Way of Bay Area:
AIDS Crisis Fund
The James Irvine Foundation
Northern California Grantmakers:
AIDS Task Force
The Colin Higgins Foundation
The Ernst and Eleanor Van Loben
Sels Foundation
The State Bar of California Legal
Services Trust Fund
Nu Lambda Trust
The Names Project
The Horizons Foundation

Law Firms

Bayside Legal Advocates
Broad, Schulz, Larson & Wineberg
Brobeck, Phleger & Harrison
Bryan Law Corporation
Feldman, Waldman & Kline
Graham & James
Heller, Ehrman, White & McAuliffe
Howard, Rice, Nemerovski, Canady,
Robertson & Falk
Kadushin Fancher Wickland
Kaus, Kerr & Wagstaffe
Landels, Ripley & Diamond
McCutchen, Doyle, Brown & Enerson
Morrison & Foerster
Orrick, Herrington & Sutcliffe
Pillsbury, Madison & Sutro
Rosen, Wachtell & Gilbert
San Francisco Traffic Clinic
Law Offices of Sandra Springs
Schachter, Kristoff, Ross, Sprague &
Curiale
Wald, Freedman, Chapman & Bendes

Corporations

Bank of California
Chevron USA
The Gap Corporation
Hewlett Packard
Matthew Bender Law Publications
Pacific Gas & Electric

Individual Donations

Michael Adams
Martha Fay Africa
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Lynne Carmichale
Daniel Chesir
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Audrey Covner
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Michael Deffley
Jan Diamond
Paul DiDonato
E. Dunfey
James Edwards & Harvey Rosenthal
James Emery
Richard Gilbert
Eli Gould
Barry Graynor
Reed Grier, *in memory of*
Ronald Goldstein
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Leland Tremain
Ellen Trossman
George Tuttle
Robert Walker
Douglas Warner
Robert Watson
Carl Wolf
Peter Young



114 Sansome Street
Suite 1103
San Francisco, CA
94104

**AIDS Legal Referral Panel
Management Committee**

Daniel Chesir
Barry Graynor
Frederick Hertz
Alice Philipson
Ora Prochovnick
Andrea Palash
Kathleen Quenneville
Janet Seldon
Mark Senick, *co-chair*
Paige Wickland, *co-chair*
Gary Wood
Carl Wolf

AIDS Panel Staff

Clint Hockenberry, *Administrator*
Rena Frantz, *Administrative Assistant*
Jackie Peoples,
Minority Outreach Director

The Minority Outreach Project is a
program of the United Way of the Bay
Area.

**Bar Association of
San Francisco
Volunteer Legal Services
Program Staff**

Tanya Neiman, *Director*
Janet Seldon, *Administrator*

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PANEL

Law Firm Fundraiser

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The 1990s for AIDS

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CLINT HOCKENBERRY
1950 – 1992

1991 ANNUAL REPORT

CLINT HOCKENBERRY

A TRIBUTE

Clint Hockenberry, the Panel's first staff person and its Director for more than six years, resigned from the Panel in early March of 1992 and died of AIDS complications a month later.

Clint brought an enormous gift of talent, energy and political dedication to the Panel. He organized the first national AIDS Vigil in Washington D.C. in 1983, writing the platform for this important event. With prophetic vision he wrote: "The Vigil is a forum in which we can show persons with AIDS that we do care about their lives, that we support their struggle to overcome discrimination in health care, housing and jobs, and that we demand necessary funding for research of AIDS."

When Clint joined our staff in 1986, the Panel was an all-volunteer network of lawyers. We had an incredible pool of caring and dedicated pro bono attorneys, but we had no systems, no statistics, no rules of operation, and little sense of how extensive the demands on our services would soon be. Clint spent his first years handling nearly every referral, coordinating the volunteer attorneys, developing case tracking systems and client documentation, and recruiting and training our attorneys. As the number of clients grew and the complexity of the legal issues asso-

ciated with AIDS expanded, additional staff was hired and Clint was able to devote more of his time to expanding the Panel's activities.

Part of Clint's brilliance was his ability to see long-range needs and develop creative responses in a pro-

active manner. He coordinated a national conference on AIDS legal services in 1988, bringing together hundreds of attorneys from across the country and thus inspiring the creation of scores of similar panels nationwide. He created a state-wide network of AIDS legal service programs,

providing technical assistance and leadership at a critical time for development of new programs. Clint also made certain that each and every one of our clients got the services they needed, recruiting and training additional attorneys when shortages developed and organizing walk-in clinics when phone referrals proved insufficient.

Clint also had both patience and persistence, essential qualities for creating an organization which could withstand the complex pressures of multi-faceted politics, unpredictable legal developments, exponential growth in size and budget, and the relentless grief of each year's illnesses and deaths. He set a pace and a standard for the office staff that resulted in tremendous loyalty and excellence. He worked closely with the Board and with numerous other AIDS services programs, to insure that tensions were eased and substantive problems were addressed and resolved. More than any one person, it was Clint who made the Panel what it is. Day after day, despite the emotional and practical challenges of responding to the endless demands for legal assistance and advice, Clint was there.

Clint stayed on the job, active and focused as ever, until less than a month before his untimely death. His friends and colleagues spoke of his valued contributions at a memorial gathering held this past April:

"Clint was the personification of the Panel's very best efforts. His was the spirit, the energy and the presence each day which made the Panel what it has become. Clint had the legal head, the organizational hands and the counselor's heart so vital to the Panel. His message was a simple one: take note of those around you most in need, rally forth your best intellectual, practical and inspirational skills to serve those needs, and in the humblest and most unpretentious way you know how, inspire, motivate and cajole those around you to do the same."

"Clint has thrown a gauntlet to each of us, to live our lives with commitment, to be thoughtful, persistent, patient and honest, to stick by our ideals and not just seek personal glory. We must continue his fight and the fight of so many others who have fallen before him. We must not give up in making San Francisco, indeed the world, better for all people."



AUGUST 21, 1950 – MARCH 24, 1992

REPORT FROM THE CO-CHAIRS

The Board of Directors of the AIDS Legal Referral Panel is pleased to present its 1991 Annual Report. The report discusses in detail the programs of the past year, and offers a snapshot of our most recent activities. Last year's report highlighted the people who make up the Panel and its clients; this year's report discusses some of the most critical legal and policy issues shaping our work. The changes in our caseload and client population reflect the evolving demographics of the AIDS epidemic, especially the increasing incidence of HIV infection among people of color, women, and most alarmingly, young persons between 15 and 25 years of age.

With nearly a decade of experience in legal services to those with HIV, the Panel is uniquely positioned to bring its expertise to bear on the growing public policy issues that inform governmental, medical, philanthropic and legal responses to the epidemic. In 1991 the Panel initiated a public policy project to make better use of that expertise. Our new Director of Policy is coordinating the Panel's response to a host of newly-identified legal and regulatory problems, especially those involving access to public benefits and private insurance and needle exchange efforts.

This past year also saw the formation of an Honorary Board to advise and assist the Panel in defining the legal needs of those in the Bay Area affected by HIV, as well as helping with our ongoing fundraising needs. We are very excited about this opportunity to strengthen our ties with the medical community, other AIDS service providers, government officials and communities of color, complementing the strong backing from BALIF, the local lesbian and gay lawyers organization. The talented and committed members of our Honorary Board, listed on the inside back cover of this report, will help us learn how the Panel can better serve its clients, focus on underserved populations and their legal needs, and improve our programs to better assist those most in need.

As this report was being prepared, our founding administrator and Executive Director Clint Hockenberry resigned for health reasons. The Board accepted his resignation with great sadness, naming him Executive

Director Emeritus. Following a very brief illness, Clint succumbed to AIDS complications on March 24, 1992.

Clint probably came the closest to disproving the axiom that no one person is indispensable. From the earliest years Clint's vision guided the Panel to increasing levels of client services. With a wonderful mixture of wry humor and dogged determination, Clint prodded the staff and the Board to devote the fullest measure to serving those with AIDS. Always an effective spokesperson and advocate, Clint was instrumental in forming a statewide AIDS legal services network (SALSA) and was tirelessly willing to assist others wishing to establish their own referral panels. All of us will miss his wise counsel, incisive judgment and unflagging devotion. The entire Board joins in mourning this loss.

It is a tribute to the Panel as a whole that Clint's unexpected passing was handled with no adverse effect on the quality of our service to clients. This was due in no small part to the Panel's new Executive Director,

**WE LOOK FORWARD TO WORKING WITH
YOU AS WE CONTINUE TO TACKLE THE
DIFFICULT CHALLENGES POSED BY AIDS.**

Kristin Chambers, who took on the task of running the Panel in addition to her already heavy responsibilities as the director of our Benefits Advocacy Program.

On behalf of the Board and the entire staff, and on behalf of our past and future clients, our thanks to each of you for your support. We look forward to working with you as we continue to tackle the difficult challenges posed by AIDS, and as we seize the opportunities presented for greater cooperation and service.

**ILENE GUSFIELD
PAUL RICHARD
1991 CO-CHAIRS**

AIDS Legal Referral Panel Honors Volunteers And Raises \$58,000 At Annual Law Firm Fundraiser

Annual Law Firm Fundraiser

As the epidemic extends into its second decade, the challenge of managing a high quality volunteer-based program grows ever more difficult. VLSP's goal is to bring its institutional credibility and staff assistance to a successful program. It's a partnership that clearly works.

VLSP'S GOAL IS TO BRING

ITS INSTITUTIONAL CREDIBILITY AND

STAFF ASSISTANCE TO A SUCCESSFUL

PROGRAM. IT'S A PARTNERSHIP

THAT CLEARLY WORKS.

EXECUTIVE DIRECTOR'S REPORT

This was a year of exciting growth and change at the AIDS Panel. We started two new programs, hired four new staff people, and served a record number of clients. Our annual Law Firm Fundraiser was a notable success, and retired Justice Alan Broussard spoke at our first East Bay Reception. Capping off the year, the Panel received the prestigious U.S. Department of Health and Human Services Assistant Secretary for Health's Award for Outstanding Accomplishment for providing services to people with HIV — landmark recognition of the critical role of legal services in the full spectrum of care for those with HIV.

After several years of providing services to our clients through legal referrals to volunteers, this year we decided we could also serve our clients in broader ways. We established a Public Policy program, designed to allow us to advocate for change nationally and regionally. The summary from the Policy Project Director in this report recounts the important new advocacy work we are doing on behalf of our clients.

Recognizing the overwhelming importance of access to private and public benefits, the Panel also expanded its existing client services in these areas. With funding from the federal government's Ryan White Comprehensive AIDS Resources Emergency Act, we created the Benefits Advocacy Program. This marks the first time the Panel has received government funding of any kind — another indication of the increased value being placed on legal services to those with HIV. The core services in the Benefits Advocacy Program are referrals to a list of specially skilled attorneys, and ongoing legal advice walk-in clinics staffed by volunteer attorneys. By having a single staff person specializing in this complex area of law, we are able to answer more questions over the phone, as well as provide focused in-service training for our attorneys and other service providers.

Other areas of referrals also received plenty of attention this year, reaching record highs. Those clients needing simple testamentary documents increased in number, although they decreased as an overall percentage of

our referrals. The demand for assistance in the area of employment doubled this year, and we faced a large increase in demands for family law referrals. As in previous years, the overwhelming majority of our clients are indigent.

The quality of client services remained high, in part as a result of three new staff people. Ron Hypolite is our new Client Services Director, supervising client referrals other than those covered by our specialty clinics and Benefits Advocacy Program. Kerrington Osborne is our new Outreach Director, organizing and staffing seven monthly clinics located throughout the Bay Area. Raul Aguilar is our new full-time bilingual receptionist.

Thus, despite significant personnel changes and the development of several important new programs, the essential role of the AIDS Panel remains the same. We remain the largest provider of AIDS legal services in northern California, continuing to strive to improve the quality of life for people living with HIV in our broad and diverse community.

KRISTIN CHAMBERS
1992 EXECUTIVE DIRECTOR

DESPITE SIGNIFICANT PERSONNEL

CHANGES AND THE DEVELOPMENT OF

SEVERAL IMPORTANT NEW PROGRAMS,

THE ESSENTIAL ROLE OF THE AIDS PANEL

REMAINS THE SAME.

CLIENT SERVICES: THE CORE OF OUR WORK

As AIDS becomes more and more a part of the lives of so many different Californians, the picture of the "typical" AIDS client has grown increasingly blurred. Heterosexuals, women, and people of color are increasingly at risk; gay men continue to succumb at an alarming rate; and teenagers are currently the fastest growing HIV infected population. As the constituent HIV population diversifies and expands, so does the nature of the demands for legal services.

The geographic range of our clients also continues to expand. Last year a full quarter of our clients resided outside of San Francisco, and we are expanding services in Marin, San Mateo, Alameda and Contra Costa counties. Clients from more remote areas also are

coming for service. Comprehensive programs are emerging in the outlying areas of northern California, but still, the Panel often is the first contact for those with AIDS-related legal problems.

The change in AIDS demographics is illustrated by the shifts in our caseloads. The number of family law referrals has increased dramatically, doubling over prior years. These include guardianships and child custody issues for children of those with AIDS, divorces amongst those with AIDS, financial planning for those facing imminent indigency, and development of new strategies to access government benefits and insurance. As clients live longer, wills and powers of attorney – while still our largest area of service – grow less central. For the second year in a row, wills and powers

of attorney made up less than half our referrals. Fear and ignorance about AIDS continue to surround our clients, with the number of landlord-tenant cases remaining high and employment disputes growing each year. As AIDS discrimination blends into economic problems, prosecuting cases grows ever more difficult. In a positive development, the Panel receives an increasing number of calls from employers and professional organizations seeking advice about their responsibilities and their employees' rights.

In addition to the core referral work handled by the Client Services program, the Panel also provides legal assistance in the form of clinics for those with insurance and benefits problems, and the Outreach program convenes clinics in a variety of community settings. These programs all complement one another, and provide services in a range of approaches designed to make our attorneys as available as possible to those who need services.

Fortunately, the local bar has responded to the ever growing demand for volunteers, primarily through the recruitment efforts of the Bar Association of San Francisco. The Panel currently has more than 450 attorneys, and we have been working diligently to recruit more attorneys in the East Bay, reaching an agreement with the Charles Houston Bar Association's Judicare program adding sixty attorneys. In recognition of the growing demands for services in outlying areas, we are currently expanding our recruitment and training programs in San Mateo, Marin, Contra Costa and Sonoma counties.

Still, the Panel needs more lawyers in San Mateo, Contra Costa and outlying counties, and we are under-volunteered in the areas of bankruptcy, landlord-tenant and employment law, among others. As the complexity of legal issues grows and our clients survive even longer, there is an increased need for specialized referrals in these emerging areas. In order to maintain the effectiveness of our all-volunteer force, recruiting and training new lawyers to handle these difficult cases remains a constant challenge.

RON HYPOLITE

AIDS PANEL CLIENTS: 1991	
TYPE OF REFERRAL	
Wills, powers of attorney, probate	44%
Insurance and government benefits	15%
Housing disputes	9%
Bankruptcy, tax, financial matters	9%
Employment disputes	6%
Criminal matters	3%
Family, health and other matters	14%
COUNTY OF RESIDENCE	
San Francisco	75%
Alameda	11%
Contra Costa	6%
San Mateo	3%
Marin	4%
Santa Clara	5%
Sonoma	5%
CLIENT INCOME	
Under \$7,000	50%
\$7,000 to \$12,000	23%
\$12,000 to \$20,000	9%
\$20,000 to \$30,000	8%
Over \$30,000	10%
CLIENT RACE	
Caucasian	79%
Hispanic	8%
African-American	9%
Asian	2%
Other	2%
LEGAL REFERRALS MADE	
2,279	
TELEPHONE INQUIRIES AND INFORMATION	
2,010	
TOTAL CLIENTS SERVED	
2,189	

Social Security, CDC Split on Defining AIDS

Activists fear changes in disability determinations

By JAMES M. HARRIS

When the Centers for Disease Control (CDC) and Social Security Administration (SSA) announced their decision to split on defining AIDS, activists fear changes in disability determinations. The CDC's new definition of AIDS, which requires a person to have a CD4 count of 200 or lower, is more restrictive than the SSA's definition, which requires a person to have a CD4 count of 200 or lower and a diagnosis of AIDS. The CDC's definition is more restrictive because it requires a person to have a CD4 count of 200 or lower, while the SSA's definition requires a person to have a CD4 count of 200 or lower and a diagnosis of AIDS. The CDC's definition is more restrictive because it requires a person to have a CD4 count of 200 or lower, while the SSA's definition requires a person to have a CD4 count of 200 or lower and a diagnosis of AIDS.



BENEFITS ADVOCACY PROGRAM

Tragically, financial hardship is one of the most commonly-felt experiences shared by those with AIDS. Some PWAs have been indigent all their lives and their illness only worsens their situation. Others had high paying jobs until they became too sick to work and now their income has been halved or worse. The Panel has responded to this urgent situation by creating the Benefits Advocacy Program, one of our most exciting new developments. Funded in part with Ryan White federal CARE Act funds, this Program expands existing client services in the critical areas of public and private benefits and debt collection.

Almost every person with HIV eventually becomes disabled. Many are eligible for federal social security benefits, state disability insurance, and MediCal. If a client's initial application for benefits is denied, he or she often needs help with an appeal, and problems such as overpayments can arise after the client receives benefits. Some with HIV are fortunate enough to have private health, disability or life insurance; accessing these benefits, however, is often fraught with difficulties. Many of our clients face unjustified claim denials and even illegal policy cancellations. Complications with these public and private benefits sources often lead to further financial problems for the clients. Bill collectors may harass them with letters and phone calls, and clients must try to solve these pressing problems while battling their illness.

In response to this crisis, the Panel has consolidated its services for clients with problems related to government benefits, insurance and employee benefits and debt collections, and a new staff position was created in May of 1991 to handle calls and referrals in these areas. By directing these calls to one person, the Ben-

efits Advocate, the Panel can offer more detailed information to clients immediately and can assist other service providers in resolving benefits problems.

The Panel sponsors a monthly workshop for clients at the San Francisco AIDS Foundation, where the Advocate makes presentations on insurability and insurance issues. Clients receive assistance at our weekly clinics, where Panel volunteers review policies, assess the client's rights, and provide follow-up intervention with the insurer if necessary. During 1991 we also started a monthly bankruptcy clinic, where clients hear a general presentation on bill collections and bankruptcy. Davies Medical Center generously hosts this Clinic, where clients also have the chance to speak individually with a volunteer attorney.

Already this first year the Benefits Advocacy Program has improved the quality of our services for these clients. By helping them resolve their insurance and financial woes, the Panel helps clients relieve some of the terrible stress in their lives, allowing them to devote their energies and their spirits to more positive concerns.

KRISTIN CHAMBERS

"Under the AIDS/HIV Discrimination Ordinance of San Francisco, the Human Rights Commission is authorized to investigate and mediate allegations of discrimination on the basis of HIV/AIDS. This includes discrimination in the areas of employment, housing, and public accommodations. The Panel's attorneys help to enforce this ordinance, by advocating for employees, working with the Commission to educate employers, and providing technical assistance to all involved to help resolve HIV/AIDS-related disputes.

The Commission's and the Panel's experience demonstrates that without adequate anti-discrimination and confidentiality protections which are well enforced, those with AIDS would be hesitant to take the steps necessary to protect their health and their employment. The Panel's walk-in clinics, referrals to volunteer attorneys, and broad-based advocacy efforts on behalf of those with AIDS are an essential component to that structure of protection."

JERRY DAVIS

**ATTORNEY WITH THE SAN FRANCISCO HUMAN RIGHTS COMMISSION
AND MEMBER OF THE PANEL'S HONORARY BOARD OF DIRECTORS**

OUTREACH PROGRAM

The Panel's Outreach Program began in 1988 with a continuing mission to improve the quality of legal services to traditionally excluded communities. The Program targets those with HIV who are members of diverse and often disenfranchised communities, including people of color, injection drug users (IDUs), women and children, youth, and those who are indigent. The Program also works with those living in outlying Bay Area counties. We are also making special efforts to reach those whose first language is not English, as well as undocumented residents and others who have been living with—and fighting against—the effects of long term indigency and disenfranchisement.

Understandably, with this mission comes many challenges. Traditional methods of reaching clients may not be effective, and we must go to where phone lines do not reach, where flyers do not circulate, and where financial district appointments make no sense.

Our clinics bring the services to the community, with a Panel attorney working directly with community based organizations. We have clinics for women, in San Francisco's Mission and Tenderloin areas, and in Contra Costa and Marin counties. We will be working with San Quentin's HIV population as well. Clinics are just a beginning, however.

The Outreach Program is committed to creating new ways to improve our service delivery systems, working with an Advisory Committee to develop new methods for the future. We also are developing "cultural competency" training for our volunteers, Board and staff, using the expertise of community members to coordinate and improve our legal services program. The Program Director speaks to service providers and the general public about HIV issues, and meets with the Office of AIDS to advocate for improved services to our clients of color. We have been closely involved with

legislation permitting lawful needle exchange programs.

All of these efforts mark significant inroads through cooperative joint ventures and creative analysis. Most importantly, they are framed by client sensitivity and cultural awareness, and a willingness to listen to and learn from our clients. Though the challenges are daunting, we are making progress. Our progress is perhaps best stated in the words of the American Indian AIDS Institute's Community Spirit Award to the Panel: "Thank you, intake staff, notaries, attorneys and all others, for your commitment to the San Francisco Community. Your Agency's Excellence is Inspirational!"

KERRINGTON OSBORNE

"The AIDS Panel has taken an important step to acknowledge the necessity for, and has taken steps to achieve, the cultural competence required to serve all of its clients adequately. Cultural competence is the commitment and action to rid one's organization of biases based upon race, class, sex and sexual preference. These are essential issues. Cultural competence is a barrier to providing useful care to those with AIDS. Staff must understand the meaning of words, the importance of family and religion, and the differences in cultural values.

Substance abuse may not generally be seen as a culture, but it is equally essential that staff not be judgmental about, and must understand, the client's life as a whole. The Panel is taking on this challenge, by developing workshops for staff and volunteers, and by demonstrating the commitment to follow through with these programs. The Panel deserves recognition and support for its efforts to achieve cultural competency, thereby providing the best possible services for its clients."

PAT NORMAN

**CHAIR OF THE BLACK COALITION ON AIDS,
EXECUTIVE DIRECTOR OF THE CALIFORNIA AIDS INTERVENTION
TRAINING, AND MEMBER OF THE PANEL'S
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THE RECORDER

When Discrimination Is Legal

Ruling allowing employer to deny health benefits for AIDS patients has activists scornful

By MICHAEL ROSENBERG

When John Kucharsky was born in 1957, his father had AIDS, but back then, AIDS was not a disease. It was just a virus, and it was not a disease.

His father was born in 1957, and his father was born in 1957. His father was born in 1957, and his father was born in 1957.

His father was born in 1957, and his father was born in 1957. His father was born in 1957, and his father was born in 1957.



PAUL DI DONATO

PAUL DI DONATO

PAUL DI DONATO

PAUL DI DONATO

PAUL DI DONATO

PAUL DI DONATO

PUBLIC POLICY PROJECT

The Public Policy Project began in 1991 with a grant from Northern California Grantmakers, and Paul Di Donato was appointed its first Director. The Project was initially housed in offices donated by the law firm of Pettit & Martin, and in April 1992 the Project relocated to the Panel's Sansome Street offices.

The Project marks an important expansion of our efforts to protect and advance the rights of those with HIV disease. This policy work is closely tied to — and is informed by — the expertise we have gained in the direct services which have been our primary focus over the past nine years. In the face of this growing and changing epidemic, our new effort reflects an evolving understanding of the many diverse components required in formulating and delivering a comprehensive "legal care" program.

Our goal is to craft solutions to HIV-related policy matters and advocate forcefully for those policies. Our overriding aim is to ensure that HIV-positive individuals have greater and more equitable access to private and public benefits — crucial for decent health care and an acceptable quality of life.

In its first year, the Project has focused on three particularly complex and critical areas:

Preventing the use by health insurers of discriminatory 'caps' on HIV insurance claims: This practice is on the rise nationally and poses a severe threat to those with HIV. If this practice becomes common, either for HIV disease or for any catastrophic condition, access to health care for those with private insurance will be severely restricted. Our first year goal is to organize a national working group of advocates, draft an analysis of the policy issues, circulate this report to government decision-makers, and develop strategies to move policy towards an outright ban of such caps.

Advocating for fair, speedy and adequate access to Social Security Administration benefits: The focus of this effort is to improve SSA regulations re-defining entitlement to disability status for those with severe HIV-disease. Overly restrictive regulations would lengthen

unnecessarily the waiting period for SSA-administered benefits, would increase without reason complications of obtaining benefits, and could lead to unjustified denial of benefits. Our goal is to build a coalition of local and national groups to pressure the SSA to re-design the overall HIV-related benefits systems in a fair manner, and prepare an analysis of the new system which can then be used as a key advocacy piece.

Working to ensure an appropriate definition of AIDS by the Centers for Disease Control: CDC is rewriting its definition of AIDS, which will be used by health care providers and public health officials to define the disease and by government and private agencies to allow access to services. Thus this new definition will have an enormous impact on access to public and private benefits. A reasoned definition based upon solid medical evidence and public health policy is imperative. We are working to urge the CDC to adopt an expanded definition to reflect the true severity and magnitude of the epidemic.

OUR GOAL IS TO CRAFT SOLUTIONS

TO HIV-RELATED POLICY MATTERS,

AND ADVOCATE FORCEFULLY FOR

THOSE POLICIES.

Within these three areas, the activities of the Policy Project have concentrated on policy and legal research and analysis, collaboration with other groups working on related issues, creation of and advocacy for new AIDS policy initiatives on the state and federal level, and technical assistance to concerned members of the AIDS service community.

PAUL DI DONATO

1991 FINANCIAL REPORT

Statement of Support, Revenue & Expenses
Year Ending December 31, 1991

PUBLIC SUPPORT & REVENUE

PUBLIC SUPPORT	Value of contributed services*	\$319,000
	Monetary contributions	250,957
	Contributions of property	1,810
	Total Public Support	571,767

REVENUE	Interest income	5,434
	Earned income	4,552

TOTAL SUPPORT & REVENUE **\$581,753**

EXPENSES

PROGRAM SERVICES	Client Services**	422,341
	Outreach	61,873
	Benefits Advocacy	56,064
	Policy Project	24,199
	Total Program Services	564,477

SUPPORTING SERVICES	Management & general	39,891
	Fundraising	25,188

TOTAL EXPENSES **\$629,556**

Full 1991 Audit available upon request

*This amount reflects donated attorney hours reported to the Panel. The estimated value of all donated hours in 1991 exceeded \$1 million.

**Includes value of donated attorney hours.

Despite international and domestic opposition, the U.S. government continues to exclude persons living with HIV. For seropositive immigrants, the anxiety and uncertainty surrounding their legal status is an overnight concern. Permanent status is the primary issue; and many are also in danger of being denied interim public benefits. The assistance of attorneys in preparing waivers of HIV exclusion and providing counseling is critical. The volunteer attorneys of ALRP can be instrumental in offering the key to a sense of legal and emotional security, as well as access to vital social services for HIV-positive immigrant clients.

IGNATIUS BAU
LAWYERS COMMITTEE FOR URBAN AFFAIRS AND MEMBER OF
THE PANEL'S HONORARY
BOARD OF DIRECTORS

Class Action Benefit Huge Success For AIDS Client Services

The benefit screening of Class Action brought out 700 members of the San Francisco legal community to support the Voluntary Legal Services Project of the Voluntary Lawyers Fund, and the AIDS Legal Center. The AIDS Legal Center is a thoroughly enjoyable evening watching a film featuring local attorneys and politicians as well as many recognizable scenes of San Francisco.

The company of Michael Apted and his wife was a special treat. Supervisor Angelo Alloto and her family attended as did the legal advisor to the film, Richard Zuck and his wonderful extended family. The "on screen" and off screen Balluff and Court Clerk, Lawrence and Elizabeth Moore were also in attendance. Apted and Moore headed down the aisle.

The film didn't exactly start on time as the crowd of attorneys in front of the marquee had a hard time dragging them selves away from the lively conversation, and then Michael Apted introduced the screening. It was not your typical well-behaved audience with all the clapping when a well-known face would flash on the screen and booing and hissing over unethical legal

TREASURER'S REPORT

The past year marked a dramatic increase in both income and expenditures. In addition to the value of donated legal services, our expenses exceeded \$310,000 with income of approximately \$260,000. In light of the growing pressures to serve more clients and provide a more varied range of services, our ability to keep up financially with the growing client demands is extremely gratifying.

Our fundraising success also constitutes the best reflection of the high regard in which our program is held, and puts us in the best possible condition to meet future demands. Primarily as a result of government grants for 1992 (a Community Block Development Grant from the County of San Francisco, a renewal of our prior CARE Act federal grant and a second CARE Act grant for client services), we entered 1992 with commitments for nearly all of our budget of approximately \$400,000.

Our most important sources of funding this past year were public grants, corporate donations, and the law firm fundraiser. Public funds include State Bar and United Way monies as well as the federal grants. This sector provided for \$80,000 of our 1991 income and will constitute nearly half of our 1992 budget. Corporate donations exceeded \$25,000, a very real increase from prior years — thanks to our Development Director's hard work in this area. This year we received a significant amount of individual donations, including several bequests and more than \$7,000 in donor-designated grants from United Way of the Bay Area.

Our law firm fundraiser, held in November at former Governor Jerry Brown's San Francisco home and featuring Amanda Donohoe of "LA Law" fame, raised more than \$50,000 from more than forty law firms, an especially satisfying success given these recessionary

times. The San Francisco firm of Heller, Ehrman, White & McAuliffe received our "Law Firm of the Year Award."

Our ongoing search for foundation funds also proved highly successful. We obtained grants from the Northern California Grantmakers AIDS Task Force, The Marin Community Foundation, The San Francisco Foundation and The Horizon Foundation, as well as a second grant from The James Irvine Foundation plus smaller grants from several local foundations. After seven years of growth we have become a well established organization with a strong funding base, and therefore we grow less dependent upon foundation support each year. Indeed, only a third of our 1991 funding was derived from foundation sources.

Our primary expenses involve the salaries and office support for our loyal and extremely hard working staff. Our community relations and development expenses increased to some degree, and our rental costs increased as we moved to larger offices. We faced predictable increases in our supplies and equipment budget, as well as our postage and copying expenses. Most striking about our 1991 figures is that we made more than 2,000 referrals on a budget of under \$300,000, providing services worth hundreds of dollars at a cost of less than \$150 per referral. In addition, we gave general information and assistance to more than 2,000 other persons, and developed brochures, clinics and other educational programs that assisted thousands more.

In seven years our annual budget has grown from less than \$25,000 to more than \$350,000. We have managed our program well, with responsible spending and full accounting of our expenditures. With our recent awards of government grants and renewable programs we have a fair degree of financial security for our program. Reflecting this strength, we are currently revamping our internal financial systems under the direction of our new treasurer Mark Senick and our Office Manager Rena Frantz, enabling us to provide more thorough reports and budgets to respond to the growing demand for financial information.

FREDERICK HERTZ



THE AIDS LEGAL REFERRAL PANEL GRATEFULLY ACKNOWLEDGES AND THANKS ITS 1991 DONORS

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In Memory of Craig Applewhite
In Memory of Lecil Handler

The Front Line in Rights for AIDS AIDS PANEL AND JUSTICE BROUSSARD Receives Honors HONOR EAST BAY PANEL VOLUNTEERS

Former Gov. Jerry Brown hosts the AIDS Legal Referral Panel's firm reception.

Director of the AIDS Legal Referral Panel. This year's fund-raiser generated \$58,000, or nearly 20 percent of the panel's total 1993 budget, and Jeffrey G. is both an associate at Goldstein & Goss.

Nearly one hundred people gathered on July 23 to honor Alameda County attorneys and paralegals who provide free legal assistance through the AIDS Legal Referral Panel (ALRP). The reception was hosted by the law firm of Beach and May, and featured wine. The company of Michael Apted and was a special treat. Supervisor and her family attended as the film, Richard and family. Referral Panel's office organization Area Lawyer (ALIP) and



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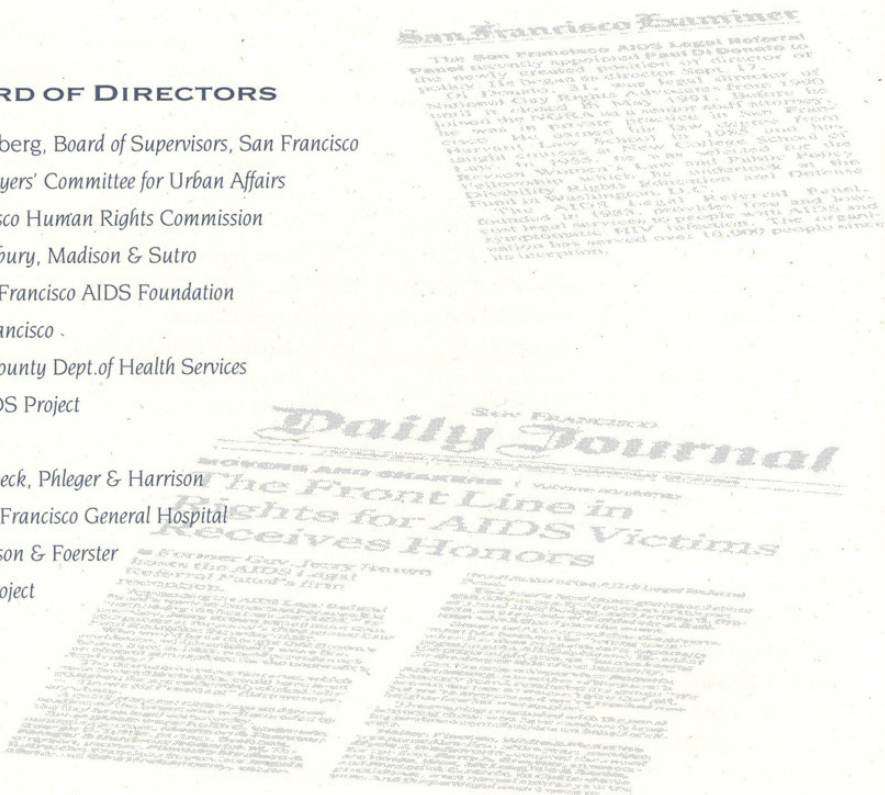
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The lawyer was one of the kindest and most understanding people I have ever met, and I am grateful for the referral. This service is wonderful: without it a person of my income would be at the mercy of the system. Thank you!

PANEL CLIENT RECEIVING POWERS OF ATTORNEY

When we called to say our son was in the hospital and could the lawyer see him there, the lawyer not only said "of course" but also "should I come tonight?" He not only came the next morning but brought a notary public. Since our son is now dying of a brain tumor, this timely and caring attention is deeply appreciated. God bless you all.

FROM A MOTHER OF A CLIENT WHO RECEIVED A WILL

I can rest easier now, knowing that things have been taken care of — one less pressure in getting on with my life.

LETTER FROM A PANEL CLIENT IN MARIN COUNTY

I want to thank you for the service you rendered my friend. It is heartening to find such caring people who are willing to assist those who are afflicted with this dread disease. I hope that you can keep up the good work, as it is so desperately needed.

LETTER FROM THE FRIEND OF A PANEL CLIENT

Your volunteer attorney program provided me with an attorney at no fee, which made it possible for me to draw up my will. Since I am so ill it was very nice to have the services brought to my home.

PANEL CLIENT WHO RECEIVED A WILL FROM THE PANEL

Our attorney was fantastic. She was sympathetic to our needs, very caring, and very helpful!

COMMENTS ON A SAN FRANCISCO PANEL ATTORNEY

Everyone at the Oakland law firm was courteous, helpful and professional. I really appreciate the time and effort the lawyer made on my behalf.

FROM A PANEL CLIENT IN THE EAST BAY