

GUIDELINES FOR DISTRICT DELEGATES

The District Delegate is the active liaison between the Executive Board of the Elder Law Section and Elder Law attorneys and Elder Law committees of county bar associations in the district.

ROLE OF DISTRICT DELEGATE: To increase participation and membership of local practitioners in the State Bar Elder Law Section by:

1. Identifying Elder Law attorneys in the district, whether or not they belong to the State Bar Elder Law Section;
2. Notifying Elder Law attorneys in the district of activities of State Bar Elder Law Section;
3. Extending individual invitations to attorneys in the district to belong to the Section, explaining the benefits of membership such as the list serve and the decisions posted on the Section website;
4. Conveying local concerns to Executive Board, such as Guardianship practice, statutory revisions, unauthorized practice of law;
5. Serving as local chairs of State Bar CLE programs;
6. Identifying local Elder Law leaders and inviting them to Executive Board meetings as observers and proposing them as Vice Chairs of committees;
7. Publicizing work of attorneys in the district in a column in the Newsletter;
8. Hosting at least one local Section activity, perhaps with neighboring districts, that will serve both social, networking and educational purposes. Examples are:
 - a. Reception to meet court/administrative personnel who may hear Elder Law issues, such as Guardianship judges and clerks, Social Security Administrative Law Judges and staffs, Department of Social Services caseworkers or ALJs with one hour panel presentation.
 - b. Services Fair: Invite local SNFs, hospitals, adult day programs, Assisted Living Centers to present their facilities with one hour panel presentation concerning funding for their programs;
 - c. Working with Other Professionals: Meeting with accountants, geriatric care managers, long term care insurance representatives, investment advisers, with one hour presentation concerning multidisciplinary rules;
 - d. Meeting with attorneys in related areas such as matrimonial or T&E for networking and Q&A concerning elder law with experienced attorneys.
 - e. Candidates; forum on Elder Law issues.
9. Writing to each Section member inviting them to attend the fall, Annual or summer meeting.
10. Cosponsoring event with other district delegates from other sections such as General Practice, Young lawyers, Real Property, etc for substantive or practice management presentation and networking/social activity.
11. Introducing yourself to local law schools and making presentations to Elder Law Classes or clinics about benefits of membership in the section.
12. Identifying speakers and program sites for Decision Day.

TIMELINE:

BY FALL MEETING:

1. Identify the Elder Law attorneys in the district and work with Membership Chair to develop letter for those who are members and letter for those who are not
2. Suggest speakers for CLE chair program chairs of summer, fall and annual meetings.

BY ANNUAL MEETING:

1. Have plans for Spring event.
2. Have column ready for next Elder Law Attorney.
3. Enlist speakers and identify sites for Decision Making Day.

BY SPRING EXEC BOARD MEETING:

1. Report on spring event with pictures to be included in Elder Law Attorney.
2. Propose Vice Chairs/Chairs to Officers.

BY SUMMER MEETING:

1. Have newsletter ready for local district concerning State Bar activities;
2. Have plans for Fall event.