

The Arc New York

2018 Annual
Guardianship
Training Symposium

September 26-27, 2018
Holiday Inn
232 Broadway
Saratoga Springs, NY



“CHANGING
THE FRAME: NEW
WAYS TO VIEW
GUARDIANSHIP AND
PLANNING
ALTERNATIVES”





The Arc New York
2018 Annual Guardianship
Training Symposium is
Proudly Sponsored by the
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NYSARC Trusts

2018 Guardianship Training Symposium

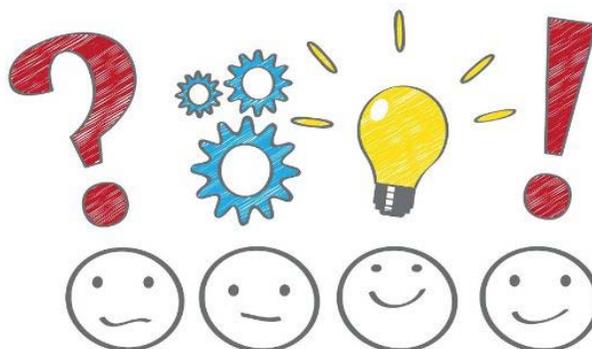


**Welcome to the 2018
Training Symposium!**

“CHANGING THE FRAME: NEW WAYS TO VIEW GUARDIANSHIP AND PLANNING ALTERNATIVES”

We are here to help!

Please let us know if you have questions or need assistance while attending the training symposium.



Enjoy the Program!

2018 Guardianship Training Symposium

Welcome To Our Symposium



We are so pleased to welcome you to our annual Guardianship Training Symposium, which is again being held in beautiful downtown Saratoga Springs. We continue to owe a debt of gratitude to the Trustees of the NYSARC Trusts for their ongoing, uncompromising and generous support for sponsoring this special conference!

This year marks the 48th anniversary of the Corporate Guardianship Program, which operates through our Chapters, providing support, care and advocacy to more than 650 people throughout New York State. The unique focus for this two-day event is examining the current approach to operating our program, the way we provide supports and services, and our current strategic planning efforts. The program is intended to explore new practices to better support the changing needs of people with intellectual and developmental disabilities and their families. This perspective is reflected in the theme, "Changing the Frame: New Ways to View Guardianship and Planning Alternatives." The discussions on Wednesday evening, September 26, and the plenary sessions on September 27 are intended to provide useful and practical tools, direction and networking opportunities for the Guardianship staff and volunteer Committee members, who are largely responsible for the ongoing operations of the Chapters' Guardianship Programs.

Although the Symposium for this year is limited in length and scope, the workshops are primarily geared toward supporting the Chapters' Guardianship Programs in their everyday practices. The conference is intended to offer a rich and diverse program, replete with topical issues and innovative sessions. The Symposium will offer the most current information on guardianship legislation, reform efforts in different areas of supported and surrogate decision making, how trusts can improve the quality of life for individuals, and end of life care and treatment issues.

We are so excited to be joined by Mark van Voorst, Executive Director of The Arc New York, and Ric Swierat, former Executive Director of our Westchester Chapter, who is now consulting for our program. Following the "Meet and Greet" Reception on September 26, they will introduce themselves and discuss our Strategic Planning efforts for the Corporate Guardianship Program. We are also pleased to have Katharine Wilson Conroy, Chairperson of The Arc New York Guardianship Committee, provide opening remarks about the future trajectory of the Corporate Guardianship Program. We are honored to have many other distinguished moderators, speakers and panelists who will help to build on our ongoing efforts to educate and provide the audience with practical tools and guidance.

Lastly, I would like to personally extend my sincerest gratitude and appreciation to Patti Conroy, Susan Brandt and Angel Buchanan, for their invaluable assistance and support. Their participation was integral to the production and success of this educational event! As always, we hope that everyone will help us continue to improve this conference by completing the evaluation forms and providing us with constructive comments that we can use for future conferences. Thank you!

Erica F. Berman

Assistant Executive Director for Guardianship Services, The Arc New York



2018 Guardianship Training Symposium

We extend our sincere appreciation to all of presenters, speakers, and panel members who have contributed their time and expertise, and shared their commitment and experience to help make this symposium a success.

Alphabetical by Last Name

Erica F. Berman, Assistant Executive Director for Guardianship Services, The Arc New York

Katharine Wilson Conroy, Esq., Chair, The Arc New York Guardianship Committee; Trustee, NYSARC Trust Services

Joanne DelRossi, Guardianship Program Coordinator/Paralegal, Columbia Chapter (Coarc)

John H.T. Dow, Esq., Assistant General Counsel, The Arc New York

Lawrence R. Faulkner, Esq., General Counsel and Director of Corporate Compliance, The Arc Westchester

Lisa K. Friedman, Esq., Attorney at Law, New York City, New York; Trustee, NYSARC Trust Services

Heidi J. Flatt, CPA, CGMA, Chief Operating Officer, NYSARC Trust Services

Kathryn E. Jerian, Esq., General Counsel, The Arc New York

Desiree Loucks Baer, Assistant Executive Director, National Alliance for Direct Support Professionals; Supported Decision-Making Coordinator, The New York Alliance for Inclusion and Innovation

Tara Anne Pleat, Esq., Wilcenski & Pleat, LLC; Member, The Arc New York Guardianship Committee

Eileen Rooney, Guardianship Program Coordinator, Nassau Chapter (AHRC Nassau)

Sheila E. Shea, Esq., Director, Mental Hygiene Legal Services, Third Judicial Department

Shannon Stockwell, Esq., Deputy Director, Mental Hygiene Legal Services, Third Judicial Department

Nancy Succoso, Guardianship Services and Quality Improvement, The Arc Westchester; Member, The Arc New York Guardianship Committee

Ric Swierat, Consultant, RPSWIERAT Consultant Group, LLC

Shelley VanLare, RN, Nurse Educator, The Arc Monroe

Mark van Voorst, Executive Director, The Arc New York



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Symposium Evening - Wednesday, September 26, 2018

6:00 pm	Registration Desk Opens.....	Back Stretch
6:00 pm - 7:00 pm	Reception/Social Hour (Cash Bar, Hors d'oeuvres, Food Stations).....	Win-Place-Show
7:00 pm - 8:00 pm	Welcome: Mark van Voorst, Executive Director, The Arc New York	
	Update: <i>"The Arc New York Corporate Guardianship Program Strategic Planning Initiative with Ric Swierat"</i>	Win-Place-Show
8:00 pm	Evening on Your Own.....	Restaurants/shopping on site and around town

Symposium Full Day - Thursday, September 27, 2018.....Win-Place-Show

7:30 am - 8:30 am	Registration Desk Open.....	Back Stretch
7:30 am - 8:30 am	Hot and Cold Breakfast Buffet	Win-Place-Show
8:30 am- 9:30 am	Welcome/Introductions and Opening Remarks	
	Erica F. Berman, Assistant Executive Director for Guardianship Services, The Arc New York	
	Katharine Wilson Conroy, Esq., Chairperson, The Arc New York Guardianship Committee	
9:30 am - 10:45 am	Session #1: <i>"Guardianship Reform: Where are we now and how did we get here?"</i>	
Presenters:	Kate Jerian, Esq., General Counsel, The Arc New York Tara Anne Pleat, Esq., Wilcenski and Pleat, LLC	
	In this session, the presenters will discuss and explain the "who" and "why" of efforts to reform Article 17-A, as well as the current status of those efforts.	



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Thursday, September 27, 2018 (continued).....Win-Place-Show

10:45 am - 12:00 pm **Session #2: "How Can the NYSARC Trusts be Used to Promote a Person's Quality of Life?"**

Presenters: **Lisa K. Friedman, Esq.**, Attorney at Law; Member of the Board of Trustees, NYSARC Trusts
Heidi J. Flatt, CPA, CGMA, Chief Operating Officer, NYSARC Trust Services

The presenters will discuss the basics of Supplemental Needs Trusts, including the who, what, when, how and why. Recent changes to the SSI Program Operations Manual System (POMS) rules related to Trusts will also be examined in addition to required documentation, the ABLE Accounts and Supplemental Needs Trusts. The speakers will further address Fiduciary obligations and Trust Distributions, while using a fact pattern to help explore these issues.

12:00 pm - 1:00pm **Buffet Lunch** (networking)

1:00 pm -2:15 pm **Session #3: "End-of-Life Decisions and Aging in Place: The Challenges of Supporting Individuals with Increased Complex Medical Needs"**

Moderator: **John H.T. Dow, Esq.**, Assistant General Counsel, The Arc New York

Presenters: **Shannon Stockwell, Esq.**, Deputy Director Mental Hygiene Legal Service, (MHLS) Third Judicial Department
Joanne DelRossi, Guardianship Coordinator, Columbia (Coarc)
Shelley VanLare, RN, Nurse Educator, The Arc Monroe
Eileen Stewart-Rooney, Guardianship Coordinator, AHRC Nassau Chapter

Some people with intellectual and developmental disabilities will experience chronic or acute medical conditions that might warrant feeding tubes, tracheostomies, and other mechanical or extraordinary interventions. These often prevent them from returning to or remaining in their natural environments because they need the additional supports and resources that only skilled nursing facilities can provide.

This panel presentation is intended to explore some of the challenges that advocates encounter when balancing the burden of intensive medical care with the quality of life of those they support. Panel members will discuss some of their most challenging or most successful experiences in helping people live and die with dignity. In particular, the panelists will work through several scenarios that address misconceptions and misunderstandings about the MOLST process and life-sustaining treatment.



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Thursday, September 27, 2018 (continued).....Win-Place-Show

1:00 pm -2:15 pm **Session #3: “End-of-Life Decisions and Aging in Place: The Challenges of Supporting Individuals with Increased Complex Medical Needs”** (continued)

Critical issues that might be addressed include but are not limited to:

- The purpose behind the MOLST process and the ethical—legal considerations it requires;
- The process of considering a 1750-b meeting and preparing the MOLST checklist/form;
- The role of MHLS in 1750-b meetings and the factors they consider when objecting to or supporting life-sustaining treatment, and;
- The difficulty when a person requires a feeding tube or other mechanical devices and the residential provider is unable to support them at home.

2:15 pm – 3:30 pm **Session #4: “Supported Decision Making: Incorporating SDM Within the Advocacy Services and Supports We Provide”**

Moderator: **Nancy Succoso**, Guardianship Services/Quality Improvement, The Arc Westchester

Presenters: **Lawrence R. Faulkner, Esq.**, General Counsel and Director of Corporate Compliance, The Arc Westchester
Desiree Loucks Baer, Assistant Executive Director at National Alliance for Direct Support Professionals (NADSP), Albany and New York Area
Sheila E. Shea, Esq., Director, Mental Hygiene Legal Service (MHLS), Third Judicial Department

Supported Decision Making, we all use it. We all seek the advice of those we trust to make every day and more significant decisions for ourselves. A friend to recommend a physician, another to offer advice on car dealerships or a good restaurant, or another to recommend a barber or hairdresser. The individuals we support have a wide range of decision-making capacity. The old model defining capacity as “all or none” no longer meets the needs or reflects the abilities of the individuals we support, in truth it never did. The question to be addressed by the panel is how to include supported decision making and other tools to assist decision making and not to inappropriately take the right to make decisions away from the individual, within the “guardianship” services already provided by so many of the chapters.

Discussion will center around the supported decision making pilot project and its role-out upstate as well, as cases of guardianship diversion and modification or removal.



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Thank you for attending.

Please take a water and granola bar for the road! Have a safe trip home.



See you next year :)

2018 Guardianship Training Symposium Materials

Following the symposium, all attendees will receive an email with a link to the original materials plus any additional materials that were added during the symposium. The email will also include an evaluation form in a fillable format to complete and submit. Please take the time to do this—We value your feedback!

If you have any questions about the materials or evaluation please email us at:

Guardianship@TheArcNY.org or call and ask to speak to a Guardianship staff person at (518) 439-8311.

Thank you.



Follow @thearcny on Facebook and Twitter for news from the Guardianship Symposium and more. Share your photos, moments and learning from the event at **#Guardianship2018**.



2018 Guardianship Training Symposium

Presenter Biographies



Erica F. Berman is the Assistant Executive Director for Guardianship Services, The Arc New York and has been employed by the organization for 35 years. Ms. Berman is responsible for the overall administration of one of the largest non-profit corporate guardianship programs in New York State, which currently serves as primary, and standby or successor guardian for more than 700 individuals with intellectual and developmental disabilities.

During her tenure at The Arc New York, Ms. Berman has served on a number of local, state, and national boards, steering and advisory committees, and has contributed to publications addressing topics as guardianship, health care surrogacy, Supplemental Needs Trusts and other future planning alternatives. She was one of the founding members of the nonprofit Guardianship Association of New York State (GANYS) in 1995, an organization of professionals, family members and other individuals committed to supporting guardians and other surrogate decision makers in enhancing the lives of people who require supports. Ms. Berman has coordinated, collaborated on and participated in numerous guardianship education programs throughout New York State on guardianship and related topics and serves on the panel for the Surrogate Decision-Making Program, which is administered by the NYS Justice Center for the Protection of People with Special Needs. During her tenure at The Arc New York, she has assisted with the coordination of statewide conferences on guardianship, surrogate and supported decision making, and future care planning held across New York State. Ms. Berman served as a board member of the National Guardianship Association (NGA), and was appointed as an original Trustee of the National Guardianship Foundation from 1995-2000. In addition to serving on the editorial board for and contributing to the publication on *Planning for the Future: A Guide for Families and Friends of Persons with Developmental Disabilities*, Ms. Berman was a primary contributor to the OMRDD publication, "*Health Care Choices*" which is designed to familiarize New Yorkers with health care decision options that are available for individuals who have mental retardation and developmental disabilities and their families. This was originally published in 2004.

Ms. Berman obtained her Bachelors and Masters degrees in Special Education and Multiple Disabilities from George Peabody College for Teachers of Vanderbilt University in Nashville, Tennessee.

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Katharine Wilson Conroy, Esq., received her B.A. degree from Newton College of the Sacred Heart, Newton, Massachusetts. She received an M.A. degree from Teachers' College, Columbia University. After teaching English full time at White Plains High School and then part-time at New Rochelle High School Extended Day Program while she was raising her children, Ms. Conroy attended Fordham University School of Law, from which she received a J.D. degree.

Ms. Conroy spent over 30 years with the law firm previously known as Kent, Hazzard, Wilson, Conroy, Verni & Freeman, LLP, first as an associate and then as a partner. Her practice with Kent, Hazzard focused on trust and estate planning and administration. Her practice also included residential real estate transactions. In early 2011, Ms. Conroy left Kent, Hazzard and became of counsel to Bertine, Hufnagel, where her practice continues to be in trust and estate planning and administration and residential real estate.

Ms. Conroy has been active in community affairs throughout her adult life, including having served for four years as President of The Arc New York, the largest not-for-profit provider of services to New Yorkers of all ages with intellectual and other developmental disabilities. She serves at present as the Chairperson of The Arc New York Guardianship Committee, and also serves as a Trustee of the NYSARC Trust Services which provides the largest pooled trust program in the United States. Ms. Conroy is on the Boards of The Arc of Westchester and the VNS Westchester. She lives in New Rochelle, NY, where over the years she has served at different times as a Trustee of the New Rochelle Public Library, Chairman of the Zoning Board of Appeals, and member of the City Council.

Ms. Conroy is a member of the New York State, Westchester and New Rochelle Bar Associations and enjoys her five children, four in-law children and ten grandchildren.

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Joanne DelRossi, after working for 25 years as a paralegal at corporate and matrimonial litigation practices in New York City and at general and criminal practices locally, joined the Columbia Chapter (Coarc) of The Arc New York in 1995 as the Executive Secretary. Soon thereafter, she became paralegal to the Guardianship Coordinator, where she assisted the Coordinator in the facilitation of the Corporate Guardianship Program and represented families in the Surrogate's Court process of obtaining guardianship of their children with disabilities for 19 years.

Upon retiring from the Columbia Chapter in January 2015, not wanting to leave the agency completely, she became their Guardianship Coordinator on an as needed basis in a consulting capacity and has recently become a member of The Arc New York's Guardianship Strategic Planning Workgroup.

Joanne is committed to community service and, in 2006, she was elected Trustee of the Village of Chatham and served for two years as the Deputy Mayor. She currently serves as a member of the Columbia County Democratic Committee, Chairperson of the Town of Chatham Democratic Committee, member of Columbia County Votes, Chairperson of the Village of Chatham Zoning Board of Appeals, and member of the Village of Chatham Zoning Revision Committee. Joanne was a long-time board member and volunteer (both locally and internationally) for Habitat for Humanity. That said, her greatest joy is spending time with her beloved granddaughter, followed by world travel.



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John H.T. Dow is the Assistant General Counsel of The Arc New York. He works with the General Counsel to oversee the Organization's day-to-day legal matters and projects. These tasks include working with the Guardianship Program on 17-A petitions, end-of-life decision making, and strategic planning. John's grandfather was a financial advisor and fundraiser for the Schoharie Chapter of The Arc New York in the 1970s, and John has inherited his grandfather's belief in the Organization's mission and potential.

John was the 2009 recipient of the Linsley-McClelland Fellowship, and his dedication to public interest law was recognized by Elon University and the North Carolina Bar Association with several awards and scholarships. He is also a published author and a guest lecturer at the SUNY-Albany School of Public Health.

Before joining The Arc New York in 2017, John was the Associate Counsel for State Senator Patricia Ritchie. Mr. Dow received his J.D. degree from Elon University in 2016, and his B.A. from Colgate University in 2011.



Lawrence R. Faulkner, Esq., is General Counsel and Director of Corporate Compliance at Arc of Westchester. He is Chair of the Health Law Section of the New York State Bar Association and a member of its Committee on Ethical Issues in the Provision of Health Care and a member of the Association's Committee on Disability Rights. Prior to joining Arc of Westchester he was the Deputy General Counsel for the New York State Office for People with Developmental Disabilities, (OPWDD), formerly known as OMRDD.

Mr. Faulkner has authored articles and spoken on medical care decision-making and the patient who has developmental disabilities; the New York State Do Not Resuscitate and Health Care Proxy statutes; abuse of older adults; guardianship, and supported decision-making. Mr. Faulkner was instrumental in the drafting and passage of the Healthcare Decisions Act for Persons with Developmental Disabilities. He received a B.A. from Cornell University and a Master's degree and J.D. from the State University of New York at Buffalo.



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Lisa K. Friedman, Esq., Attorney at Law is a member of the Board of Trustees of the NYSARC Trusts, practices law in the area of planning for persons with disabilities and their relatives, including transition planning from special education to adult programs, residential and program issues, personal needs guardianship and property needs guardianship, trusts, supplemental needs trusts and estates. She also represents providers.

She serves on surrogate decision-making panels under Article 80 of the New York State Mental Hygiene Law. Friedman is a member and former co-chair of the New York State Bar Association's (NYSBA) Disability Rights Committee. She is a member of the Elder Law and Special Needs Section (ELSN) and Trust & Estate (T&E) Sections. She is a former Chair of the Committee on the Elderly and Disabled of the T&E Section and is currently Co-Chair of the Special Education Committee of the ELSN Section. She is the former chair of the Special Needs Committee of the ELSN Section. She has co-written and regularly updated, with Lawrence Faulkner, Esq., a chapter entitled "Distinguishing Article 81 and Article 17-A Proceedings," in the NYSBA's publication, *Guardianship Practice in New York State*, (1997 and 2004).

Lisa has also co-written and regularly updated a chapter in a NYSBA publication now known as *Disability Law and Practice: Book Two, Financial and Health Care Benefits and Future Planning*, with Lawrence Faulkner, Esq. and Genoveffa Flagello, "Guardianship Article 17-A Proceedings under the Surrogate's Court Procedure Act" most recently updated in 2015. She has co-chaired and presented at continuing legal education programs, agencies and advocacy groups on multiple topics including, future care planning, representing people with disabilities, supplemental needs trusts, and guardianship. She chaired and presented at many NYSBA programs including Estate Planning and Future Planning for Persons with Developmental Disabilities, and Their Families, and Estate Planning and Future Planning for Persons with Mental Illness and Their Families. She also regularly teaches Article 81 Guardianship Training for Guardians, Court Evaluators and Attorneys for the Alleged Incapacitated Person at the Brookdale Center for Healthy Aging, Hunter College City University of New York, Sadin Institute for Law & Public Policy.

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Heidi J. Flatt, CPA, CGMA, is the Chief Operating Officer for NYSARC Trust Services located in Latham, NY. Ms. Flatt has been the administrator of the Trust programs since 2000. She has been employed in a financial management capacity for The Arc New York since 1992. A graduate of the State University of New York at Oneonta, she holds a Bachelor of Science degree in Business Economics with concentrations in Accounting and Finance.

Ms. Flatt is a Certified Public Accountant and Chartered Global Management Accountant, licensed in the State of New York. Her professional affiliations include membership in the American Institute of Certified Public Accountants and the New York State Society of Certified Public Accountants. She is Vice Chairman of the Board of the Highlight Acting Troupe in Brunswick, NY. She served as a Trustee of the Brittonkill Educational Foundation from 2001 through 2013, and is a parishioner, and past Vestry member, of All Saints Church in Hoosick, NY.

Heidi has presented on NYSARC's trust services programs for the NYS Bar Association, National Academy of Elder Law Attorneys (NAELA), law firms, agencies, and service providers across New York State. She is dedicated to addressing the needs of individuals with disabilities through the use of supplemental needs trusts. Her extensive experience working with supplemental needs trusts and programs for the disabled has allowed her to become very knowledgeable in the areas of Medicaid, Social Security, and other government benefits, as well as, to understand the needs of those with varying disabilities.



Kathryn E. Jerian—Kate Jerian is General Counsel for The Arc New York located in Latham, New York. She practices law in the areas of disability, guardianship, and non-profit corporations. She has worked extensively in the area of advising The Arc New York and its Chapters on a variety of legal matters involving 17-A guardianships, including counseling on a regular basis regarding the application of the law to matters of end-of-life decision-making for individuals with developmental disabilities, as well as other general matters. She is a member of the New York State Bar Association.

Ms. Jerian earned her J.D. in 2007 from Albany Law School, *magna cum laude*, and her B.A., *summa cum laude*, in 2000 from the University at Albany. She was the 2006 recipient of the Judge Bernard S. Meyer Scholarship. She is admitted to practice in all New York State Courts and the United States District Court for the Northern District of New York.



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Tara Anne Pleat, Esq., co-owns the law firm Wilcenski & Pleat, PLLC. She practices in the areas of special needs estate planning and administration, traditional estate planning and administration, long-term care planning, and elder law. Tara graduated cum laude from Albany Law School with honors in the Estate Planning concentration and earned her undergraduate degree from the State University of New York at Albany.

Tara is the Chair-elect of the Elder Law and Special Needs Section of the New York State Bar Association. Tara is the immediate past editor of the *Elder and Special Needs Law Journal*, a publication of the New York State Bar Association. She is also an active member of the Trusts and Estates Law Section, where she serves as District Delegate for the Fourth Judicial District. She is honored to be a member of the Special Needs Alliance, an invitation-only, national network of leading attorneys dedicated to the practice of disability and public benefits law. She is also a Member of the Academy of Special Needs Planners and the National Academy of Elder Law Attorneys.

In March of 2016, Tara was elected as a Fellow of the American College of Trust and Estate Counsel (ACTEC). ACTEC Fellows are selected on the basis of experience, professional reputation and ability in the fields of trusts and estates and on the basis of having made substantial contributions to these fields through lecturing, writing, teaching and bar activities.

Tara is a Past President of the Board of Directors of the Estate Planning Council of Eastern New York. In addition, Tara is a graduate of the 2006 class of Leadership Saratoga, sponsored by the Saratoga Springs Chamber of Commerce, and currently is a member of the Leadership Saratoga Advisory Board. Tara is a Member of the Board of Directors of AIM Services, Inc., a disability service organization based in Saratoga Springs, New York. She is a Member of the Board of Directors of the Wesley Community, a continuing care community for seniors in Saratoga Springs, New York and also serves on the Board of the Wesley Foundation. Tara also chairs the Planned Giving Committee of the Wildwood Foundation, an organization that supports Wildwood Programs, a school for individuals with disabilities in Albany, New York. Tara is also a Member of The Arc New York's Statewide Guardianship Committee.

In the fall of 2012, Tara was appointed as an adjunct professor of law at Albany Law School, where she teaches a course in the spring semester on estate and financial planning for the elderly and individuals with special needs.



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Desiree Loucks Baer serves as the Assistant Executive Director for the National Alliance for Direct Support Professionals and the Supported Decision-Making Coordinator for the New York Alliance for Inclusion and Innovation. Desiree has spent her career advocating for people with intellectual and developmental disabilities with a focus on the facilitation of cultural change in the delivery of services achieved through person centered supports reflective individual's personal needs, and valued outcome for integrated opportunities, the development of new leaders and strong teams in a variety of settings, and the promotion of direct of support professionals in the areas of role recognition and professional development. In the past

three years Desiree has worked with CUNY/Hunter College and the Arc Westchester on the design and pilot of a model of supported decision making, as an alternative to guardianship for people with intellectual and developmental disabilities. Desiree has a Master's Degree from Sage Graduate School in Health Services Administration.



Eileen Rooney, Guardianship Program Coordinator, AHRC Nassau, a Chapter of The Arc New York, obtained her undergraduate degree from SUNY Albany with a concentration in Psychology. Upon graduation, Eileen began her career in the field of disabilities and continued in the field for over 25 years. Eileen went on to obtain her Master's Degree in Health Care Administration at C.W. Post, Long Island, New York. She has assumed various positions in the field: Direct Care Worker, Case Manager, Case Manager Supervisor, Day Habilitation Supervisor, and Residential Enrollment

Coordinator, which includes her current position as Guardianship Program Coordinator for the AHRC Nassau.

Eileen believes one of the most important roles as guardian is to be a strong advocate. As individuals depend on many different caretakers throughout their lives, the guardian can be the link to ensure the persons' wants and needs do not get lost during times of transition. She assists families in determining if guardianship is the best alternative to meet their family member's needs. Once this determination is made, Eileen provides guidance to all of the options available. If a corporate guardianship is being sought with the support of the Nassau Chapter, Eileen helps the families throughout the process.



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Sheila E. Shea, Esq. is a graduate of the University of Vermont and the Albany Law School of Union University. She joined the Mental Hygiene Legal Service, Third Judicial Department in 1987 and in 2007 was appointed as its director. She was the recipient of The Arc New York 2013 Hodgson/Jacobs Law Award presented by Organization for demonstrating outstanding commitment and dedication to improving the lives of people who have intellectual and other developmental disabilities and the 2014 Cerebral Palsy Associations of New York Public Service Award. Sheila Shea is admitted to practice law in the State of New York.



Shannon Stockwell is the Deputy Director of the Mental Hygiene Legal Service for the Third Judicial Department. Mr. Stockwell began his career with MHLS in 2003 as a staff attorney representing constituents throughout the Adirondack Region. He joined the MHLS Director's Office in 2008 and since then has concentrated his practice primarily in the area of appellate litigation. In 2015, he was appointed Deputy Director by the Honorable Karen K. Peters. Shannon is a 1994 graduate of SUNY Oswego and a 2000 graduate of Albany Law School.



Nancy Succoso, Guardianship Services/Quality Improvement, The Arc Westchester, is an advocate, educator and administrator for The Arc Westchester Guardianship Program. She received her B.A. from SUNY at New Paltz and M.A. from Teachers College, Columbia University. Nancy is currently involved with Supported Decision-Making New York in promoting alternatives to guardianship.

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Richard (Ric) Swierat has recently retired as Executive Director of The Arc Westchester, a not-for-profit organization supporting people with intellectual and developmental disabilities. Ric has been in the field of special education and not for profit management for 47 years as a classroom teacher, program director and executive director in three Arc Chapters in New York. His recent retirement in June 2018 occurred after 35 years with the Arc Westchester.

Ric is active in many educational and community not-for-profit endeavors including membership with the Business Council of Westchester, Trustee of the Mid-Hudson Library System, and volunteer with the local library and the Westchester Children's Museum. He is continuing to support The Arc mission through ongoing volunteer assignments with The Arc New York and The Arc US in support of program strategic planning, board training and technical advice for The Arc Chapters. In addition, Ric is volunteering with The Arc Westchester and Mercy College in Dobbs Ferry, New York to guide the use of cognitive technologies to provide support and independence for people with disabilities. Mercy College recognized Ric for this work with an honorary Doctor of Humane Letters at the May 2018 graduation ceremonies.

Ric has been an adjunct professor at Western Connecticut State University Ansell School of Business for seventeen (17) years and recently joined the faculty of Pace University Public Administration School as an adjunct professor. He holds a B.S. from Canisius College, Buffalo, NY, an M.A. from the State University College at Buffalo, New York in Mental Retardation and Special Education, and an SAS certificate in Education Administration from the State University College at New Paltz, New York. He also has uncompleted doctoral work with Walden University in Applied Management and Decision Sciences.

Ric and Catherine have been married for 42 years and have their residences in Dutchess County, New York and Orleans, Massachusetts. In his free time, you will find him babysitting grandchildren, or on long distance cycling trips as well as traveling for birding photography and nature walks along Cape Cod beaches.

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Shelley VanLare, RN, has 40 years in I/DD Nursing with a specialty in aging and dementia. Of those, Shelley spent 34 years providing nursing technical assistance to OPWDD and voluntary agencies with health related/nursing issues. For eight years, she was a member of the Geriatric Assessment Clinic at Finger Lakes DDSO—a multidisciplinary team assisting families, staff and individuals with diagnosis and care for dementia and aging challenges. She provided nationally available webinars for direct support professionals and nurses in the many areas of aging and Intellectual disabilities. Currently, Shelley is with The Arc of Monroe where she was Director of Nursing, The Quality Improvement Nursing Coordinator, and currently is a mentor and RN Educator. Shelley also oversees the Arc of Monroe Guardianship Program.

In 2011 MS. VanLare co-authored a poster presentation, *“The Challenge of a Diagnosis of Dementia in Persons with Developmental Disabilities.”* Also in 2011, Shelly developed and narrated a video funded by NYS for use in training on IDD & aging in nursing homes, colleges and NYS funded programs.

In 2013, Shelly co-authored *“Healthy Aging for Older Adults with Intellectual and Developmental Disabilities”* published in the Journal of Psychosocial Nursing, Vol. 51, No. 1, 2013.



Mark van Voorst is the Executive Director of The Arc New York, the largest nonprofit organization in New York State serving people with intellectual and developmental disabilities. The Arc New York supports 60,000 individuals, employs 30,000 people, and has more than 100,000 members, and 52 Chapters across the state.

Prior to joining The Arc New York, Mark served as Chief Executive Officer at Lifespire for 16 years, a New York City nonprofit organization dedicated to supporting New Yorkers with developmental disabilities so they can be independent, become integrated into their neighborhoods, and contribute to society. Mark devoted the first 23 years of his career advancing through various operational management levels at The Arc New York’s Jefferson and Fulton Chapters. He holds membership and leadership roles with numerous trade associations such as the Interagency Council, NYSRA, NYSID, New York Integrated Network, and is currently serving as Chair of the Human Resources Committee for Care Design NY, LLC.



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