The Arc New York 2022
Guardianship Training Symposium

"Autonomy, Decision-Making Supports & the Changing World of Guardianship"

November 2-3, 2022
The Arc New York
2022 Annual Guardianship Training Symposium is Proudly Sponsored by the Trustees of the NYSARC Trusts
Welcome to the 2022 Training Symposium!

“AUTONOMY, DECISION-MAKING SUPPORTS AND THE CHANGING WORLD OF GUARDIANSHIP”

We are here to help!
Please let us know if you have questions or need assistance while attending the training symposium.

Enjoy the Program!
We are so pleased to welcome you to our annual Guardianship Training Symposium, which has recently been transformed from an in-person to a virtual format. We hope that next year, we will all be together in-person! This year marks the 52nd anniversary of the Corporate Guardianship Program, which operates through our Chapters, providing support, care and advocacy to more than 500 people throughout New York State. 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!

The primary focus of this 1 1/2 day event is on topics such as leadership, Medical Orders for Life-Sustaining Treatment, (MOLST), how guardianship and Supported Decision-Making (SDM) can coexist and are not mutually exclusive, A View from the Bench, SDM and guardianship reform, Informed decision Making and the Power of Choice, as well as Guardianship and Alternative Tools for decision making. The program is intended to explore practices to better support the changing needs of people with intellectual and developmental disabilities and their families in the least restrictive manner and environment. This perspective is reflected in the theme, “Autonomy, Decision Making Supports, and the Changing World of Guardianship.” The plenary sessions on Wednesday, November 2nd and 3rd are intended to provide useful and practical tools, guidance and opportunities for engagement for the audience. It is also our intention to provide this opportunity for education and training for our Guardianship staff and volunteer Committee members, who are largely responsible for the ongoing operations of the Chapters’ Guardianship Programs.

We are so pleased to be joined again by John Kowalczyk, President and The Arc New York, Erik Geizer, Chief Executive Officer of The Arc New York, and Katharine Wilson Conroy, Chairperson of The Arc New York Guardianship Committee, who will provide the welcome and opening remarks. We are honored to have Drew Dudley, our internationally renown Keynote speaker, in addition to many other distinguished moderators, presenters, 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 members of our Guardianship Training and Education Committee, Angel Buchanan, our State Office Communications Team, and other administrative staff for their invaluable assistance and support. Their participation is 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 form that will be sent to you after the symposium. We continue to value your constructive comments so we can always improve future conferences. Thank you!

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

**Samantha Bardwell**, Albany Law School Class of 2022 and Disability Law Research Fellow  
**Erica F. Berman**, Director for Guardianship Services, The Arc New York  
**Dr. Patricia Bomba**, MD, MACP, FRCP Founder, NY MOLST & eMOLST Programs, Founder & Emeritus Chair, MOLST Statewide Implementation Team, Co-Founder, National POLST  
**Haldan Michael Blecher, Esq.**, Senior Attorney, NYS OPWDD  
**Katharine Wilson Conroy, Esq.**, Chair, The Arc New York Guardianship Committee; Trustee, NYSARC Trust Services  
**Drew Dudley**, Day One Leadership, International Speaker and Acclaimed Author  
**Julie B. Friedman**, Managing Attorney, Albany Regional Office, Mental Hygiene Legal Services, Third Department  
**Erik Geizer**, Chief Executive Officer, The Arc New York  
**Hon. Louis P. Gigliotti**, Surrogate, Oneida County Surrogate’s Court  
**Sarah Grimes**, Director of Outreach & Community Relations, The NYSARC Trust Services  
**Hon. David H. Guy**, Surrogate, Broome County Surrogate’s Court  
**Jason Hopper**, Manager of Staff Development and Training, The Arc Rockland  
**Devon Juda**, Self Advocate, SDM Decision Maker  
**Michele Juda**, Executive Director, Parent to Parent NYS  
**Hon. Peter J. Kelly**, Surrogate, Queens County Surrogate’s Court  
**John Kowalczyk**, President, The Arc New York  
**Patricia Paduano**, Saratoga Chapter, Guardianship Committee Member and SDM Facilitator  
**Tara Anne Pleat, Esq.**, Wilcenski & Pleat, LLC; Member, The Arc New York Guardianship Committee  
**Hon. Brandon R. Sall**, Surrogate, Westchester County Surrogate’s Court  
**Sheila E. Shea, Esq.**, Director, Mental Hygiene Legal Services, Third Judicial Department
2022 Guardianship Training Symposium

Symposium Full Day – Wednesday, November 2, 2022

8:30 am - 9:30 am  Welcome/Introductions and Opening Remarks

Erik Geizer, CEO, The Arc New York
John Kowalczyk, President, The Arc New York
Katharine Wilson Conroy, Esq., Chairperson, The Arc New York Guardianship Committee
Erica F. Berman, Director for Guardianship Services, The Arc New York
Sarah Grimes, Director of Outreach & Community Relations, NYSARC Trust Services

9:30 am - 10:30 am  Session #1: (Keynote Address) - The Leadership Test: Six questions that Transform People and Organizations

Speaker:  Drew Dudley, Day One Leadership

THE LEADERSHIP TEST

This presentation focuses on empowering individuals at all levels of an organization to call themselves leaders. In this engaging and story-driven keynote, Drew shows audiences how to be more conscious and consistent in creating powerful moments of everyday leadership. Drew demonstrates that there is a form of leadership that is driven by a daily commitment to acting on six core values: impact, courage, growth, empowerment, class, and self respect. “The Leadership Test” is a series of value-driving questions designed to ensure that commitment, and while the questions may be simple, the behavioural changes they generate build better careers, stronger organizations, and more fulfilling lives.

Sharing stories from small town Canada to the deserts of Qatar, and insights from leaders of all types—CEOs, elite athletes, cab drivers, custodians, and everyone in between—this presentation will change the way you think about leadership in your life, workplace, and community.
10:45 am - 12:00 pm **Session #2: MOLST: Our Medical, Ethical and Legal Responsibility to Improve Quality and Honor Preferences**

**Presenter:** Dr. Patricia Bomba, MD, MACP, FRCP Founder, NY MOLST & eMOLST Programs, Founder & Emeritus Chair, MOLST Statewide Implementation Team, Co-Founder, National POLST

MOLST is a set of medical orders and key pillar of palliative care for seriously ill individuals who have advanced illness or multiple comorbidities. The goal is to improve the quality of life and reduce suffering for individuals with intellectual/developmental disabilities (I/DD), the same as the general population. Unfortunately, completion of MOLST and the SCPA 1750-b process outlined on the OPWDD Checklist is most often completed in the hospital when people with I/DD experience serious acute medical events superimposed on advanced illness. Intensive care often requires feeding tubes, tracheostomies, dialysis and other extraordinary interventions that often prevent them from returning to their previous living arrangements and experiencing a quality of life consistent with what matters most to the individual.

The presenter will explore some of the challenges encountered when balancing the burden of intensive medical care with the quality of life and offer potential solutions:

- Designing and implementing a systematic approach to advance care planning for all individuals with I/DD starting at 18 years of age
  - Identifying individuals with the capacity to choose a health care agent and ensuring proper completion of health care proxies
  - Defining and documenting the individual’s values, beliefs, goals and “what matters most”
- Recognizing the complexity of medical decision-making and fostering a model of shared decision-making that ensures the voice of the individual is heard
- Incorporate supported decision making when regulations are finalized
- Identify individuals appropriate for MOLST before acute hospitalization is required

1. Identify opportunities to improve use of MOLST for individuals with I/DD

2. Demonstrate how elements of the standardized 8-steo MOLST protocol are effectively used.

3. Recognize how, when and why the OPWDD legal requirements checklist must be completed.

4. Explain how eMOLST ensures quality, patient safety and accessibility
Wednesday, November 2, 2022 (continued) .................................................................

12:00 pm – 1:00 pm Lunch “Guardianship Legacy of Love” Video

1:00 pm – 2:15 pm Session #3: “A View from the Bench: Guardianship & Supported Decision-Making Issues, Challenges, Practices & Reform”

Moderator: Tara Anne Pleat, Esq., Wilcenski & Pleat, PLLC, Special Needs and Trusts & Estates Attorney, New York, and Member of The Arc New York Guardianship Committee

Presenters: Hon. Louis P Gigliotti (Oneida County); Hon. Peter J. Kelly (Queens County); Judge David H. Guy, (Broome County); and Hon. Brandon R. Sall, (Westchester County)

In this session, participants will hear from sitting Surrogate Court Judges about the important role of the Court in guardianship proceedings. The audience will learn about the duties of the Court, as well as evolving expectations in today’s climate of supportive decision-making, self-determination, guardianship appointments and less restrictive supports. Participants will better understand the guardianship process and ongoing responsibilities of guardians as well as learn to better navigate the Surrogate Court system in a changing world on behalf of the individuals with intellectual and developmental disabilities they serve.

2:15 pm – 2:30 pm Break

2:30 pm – 3:45 pm Session #4: “How Guardianship and SDM Can Coexist”

Presenters: Patricia Paduano, Member of Guardianship Committee, Saratoga Bridges, and SDM facilitator, Samantha Bardwell, Albany Law School Class 2022, and Disability Law Research Fellow; Michele Juda, Executive Director Parent to Parent of NYS, Devon Juda, Self-Advocate, SDM Decision Maker and Haldan M. Blecher, Senior Attorney, Office of Counsel – Bureau of Service Delivery NYS OPWDD

Guardianship provides important legal authority and is one of several important tools in supporting a person with their decision making. However, it does not solve or prevent every problem or support every need. In this session, participants will learn about the new SDM legislation recently signed into law, when and how to use supported decision-making (SDM) principles and practices to assist the individuals while promoting greater independence, choice making and self-determination, and how guardianship can also be employed to empower and promote greater autonomy and access to supports and services.
Thursday, November 3, 2022

8:45 am—9:00 am—Welcome/Housekeeping

9:00 am - 10:30 am  Session #5: “The Evolving Legal Landscape in New York State: Guardianship and Alternatives”
Presenters: Sheila E. Shea, Esq., Director, Mental Hygiene Legal Services, Third Department, and Julie B. Friedman, Esq. Managing Attorney, Albany Regional Office, Mental Hygiene Legal Services, Third Department

This session will introduce participants to the different types of guardianships available in New York and alternatives to guardianship including health care proxies, surrogate and supported decision making. Led by experienced attorneys with Mental Hygiene Legal Service, it is anticipated that the seminar will provide basic legal foundations with case scenarios to enforce active learning. Audience participation is encouraged.

10:40 am—12:00 pm  Session #6: “Informed Decision Making and the Power of Choice: Supporting Individuals in Acquiring a Rewarding Life Experience”

Presenter: Jason Hopper, Manager of Staff Development and Training, The Arc Rockland

In this seminar we will go in-depth about how to help an individual live an independent lifestyle when faced with the challenges of having lived a life directed by parents/guardians. The following topics will be discussed:

- What does it feel like to be placed in an unfamiliar situation and having to make a decision with limited knowledge of the situation?
- Learned helplessness and other mental barriers that prevent individuals from realizing their full potential.
- Scenarios where individuals have to make a choice regarding a difficult decision and how support providers need to construct all of the outcomes (pros and cons) before the individual chooses the best outcome for themselves.
- The Dignity of Risk – Every decision we each make has an element of risk. Unless there is imminent harm, an individual has the right to make a decision and take a risk, even if that decision can lead to a negative outcome. We all learn from mistakes, and individuals should have the right to learn as well.
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:

bermane@thearcny.org or buchanana@thearcny.org. You can also 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 #Guardianship2022.
Samantha Bardwell is Albany Law School’s 2022 Sandman Fellow, a third-year law student, and the proud older sister of two disabled siblings. Her fellowship research focuses on medical decision-making by and for adults with severe intellectual disabilities and she plans to continue to advocate for this population after she graduates in December.

Erica F. Berman is the Director for Guardianship Services, The Arc New York and has been employed by the organization for 37 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 500 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.
**Haldan Michael Blecher** is a Senior attorney at the Office for People with Developmental Disabilities (OPWDD) in the Bureau of Service Compliance, and Fair Hearings. His work is primarily focused on the individual rights of people with developmental disabilities, including developing regulations, guidance, and policy in the areas of decision-making, consent, guardianship, community placement procedures, behavioral interventions, religious liberties, medical orders for life sustaining treatment, and privacy. He is a graduate of The City College of New York and City University of New York School of Law, and began his career in public service as a New York State Excelsior Service Fellow. Haldan was the principal author of New York’s Supported Decision Making Act, which will become Article 82 of the Mental Hygiene Law upon adoption of associated OPWDD regulations.

**Dr. Patricia Bomba** is a nationally & internationally recognized palliative care/end-of-life expert, previously served as vice president and senior medical director of geriatrics and palliative care at Excellus BlueCross BlueShield (BCBS). Dr. Bomba founded the New York Medical Orders for Life-Sustaining Treatment (MOLST) & eMOLST programs. At the request of the commissioner of the New York State Department of Health, she developed and served as chair of the MOLST Statewide Implementation Team; she currently serves as the Emeritus Chair. Prior to working at Excellus BCBS, Dr. Bomba spent four years in academic medicine and nearly two decades in private practice focused on the care of frail older adults and patients with multiple co-morbidities. She developed the first physician-nurse practitioner practice model in a long term care setting in Rochester in 1983.

She is a founding member of National POLST, serves on the Executive Committee of the Plenary Assembly, chairs the Public Policy Committee and previously served on the Leadership Council. She served on the Institute of Medicine’s Committee that produced *Dying in America: Improving Quality and Honoring Individual Preferences Near the End of Life*, the NASEM Roundtable on Quality Care for People with Serious Illness, NCQA’s Geriatric Measurement Advisory Panel (GMAP) and the Medical Society of the State of New York Ethics Committee.

Dr. Bomba is author of several articles on issues related to advance care planning, palliative care, elder abuse and end-of-life concerns. She has spoken extensively regionally, statewide, nationally and internationally to professionals, community groups and professional organizations on issues related to advance care planning, MOLST, palliative care, pain management, elder abuse and other geriatric topics. Dr. Bomba earned a bachelor’s degree from Immaculata College and graduated from the University of Virginia School of Medicine. She completed her residency in Internal Medicine at the University of Rochester. Dr. Bomba is board certified in Internal Medicine, with Added Qualifications in Geriatric Medicine. She attended the Executive Development Program at the Wharton Business School.
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.
Drew Dudley: Somewhere around the middle of his undergraduate education, Drew realized engaging with the world was a lot more fun that writing paper about it.

While still a student he became heavily involved in Canada’s largest post-secondary charitable initiative in support of Cystic Fibrosis Canada, eventually serving as the National Chair of the organization. As he moved into his career, he took on the challenge of creating and building the Leadership Development Program at the University of Toronto, which became the largest and most dynamic in the country.

It was those leadership students who changed the course of Drew’s professional life: they secretly organized a campaign to put him onstage at TEDxToronto 2010, where he delivered a talk that would go on to generate more than 5 million views around the web. A high-achieving lifestyle took its toll however: undiagnosed bipolar disorder set the foundation for binge eating and drinking, and Drew grew to over 300 pounds while struggling with the emotional challenges of a career that kept him on the road 250 days a year.

Drew credits the Day One process with saving his life—he can began applying the process to improving his mental and physical health. Recognizing how many people were struggling silently with similar battles, Drew began infusing these experiences into his keynotes, hoping to remind people that their scars in no way stand in the way of their leadership.

In 2018, Drew shared both his story and the Day One process in his first book “This is Day One: A practical Guide to Leadership That Matters.” Today, Drew continues to travel the world sharing the Day One process with organizations of all kinds aiming to redefine leadership for as many people as possible.
Julie B. Friedman, Esq. is Julie Friedman is 1993 graduate of Cornell Law School and a 1988 graduate of Cornell University=s School of Industrial and Labor Relations.

Since 1999 Ms. Friedman has been an attorney with the Albany Regional Office of Mental Hygiene Legal Service (MHLS), a division of the New York State Appellate Division, Third Judicial Department and is currently the Managing Attorney for the Albany Regional and Kingston offices. MHLS provides legal representation for individuals who receive or are in need of services for mental illness or developmental disabilities, including individuals in psychiatric hospitals, community residences and other facilities serving the disabled. MHLS also frequently serves as appointed counsel or court evaluator in adult guardianship matters pursuant to MHL '81 and as counsel or guardian ad litem in guardianships pursuant to SCPA '17a. Ms. Friedman has been serving as the managing attorney of the office since September 2020.

Prior to joining MHLS, Ms. Friedman was a staff attorney at the Albany Law School’s Disabilities Law Clinic, primarily focusing on special education law. Ms. Friedman also represented adults and children with mental and physical disabilities in a variety of civil matters as a protection and advocacy attorney with Legal Aid in Binghamton, New York from 1993 - 1997.

Ms. Friedman is a frequent speaker on legal issues relating to the work of MHLS and has been invited to speak by state and local bar associations, hospitals, and agencies and organizations providing services to individuals with disabilities.
Erik Geizer, Chief Executive Officer, The Arc New York has more than two decades of progressive experience in management, quality improvement, policy development, compliance, training, internal controls, and investigations in the public and private sectors, with a specialization in health care, managed care, and services for individuals with disabilities. He is the Chief Executive Officer for The Arc New York, the country’s largest not-for-profit organization for people with developmental disabilities, serving approximately 60,000 individuals, employing 30,000 people, and with annual revenues of more than $1.8 billion. Erik works collaboratively with the organization’s Board of Directors to oversee and support its Chapters across New York State. Erik is responsible for all internal and external functions, including legal, financial, programs and services, quality and compliance, advocacy, communications, public relations, guardianship, and trust services. Erik also facilitates Chapter collaborations and mergers and Chapter stabilization efforts.

Erik was previously Director of Operations for the NYC Behavioral Health Organization (BHO) with United Healthcare. His role was implementing and overseeing all aspects of a Behavioral Health Medicaid Managed Care Division that was implemented as part of the Governor’s Medicaid Redesign Team recommendations. Erik was responsible for 70 staff and a budget of more than $7.5 million. Erik was also in senior management at the NYS Office of the Inspector General and was a senior level investigator at the former NYS Commission on Quality of Care for the Mentally Disabled. He specialized in broad-scale investigations and audits of health care and disability services and programs throughout the state. Erik’s investigations/audits into high profile incidents led to new laws (including both Jonathan’s Law and Kendra’s Law), as well as expanded services, improved policies, and additional funding for people with disabilities across New York State.

He is a Licensed Mental Health Clinician (LMHC), a Certified Fraud Examiner (CFE), a Certified Government Audit Professional (CGAP), and is Certified in Healthcare Compliance (CHC). He graduated with a B.S. from SUNY Geneseo and a M.S. from SUNY Albany.
Hon. Louis P. Gigliotti, Judge Gigliotti has been serving as the Oneida County Surrogate since 2009. Prior to taking the bench, Judge Gigliotti was in private practice for over 25 years handling a variety of civil litigation matters, including estate and trust litigation.

In addition to serving as Surrogate, Judge Gigliotti is designated an Acting Supreme Court Justice. In that capacity, he presides over the Oneida County Mental Hygiene calendar. This calendar includes handling all guardianship petitions filed under Article 81 of the Mental Hygiene Law.

Judge Gigliotti is a Past-President of the Surrogates’ Association of New York State. In addition to being a member of the New York State Bar Association’s Elder and Special Needs Law section, he is also a member of the Trusts and Estates section. He has been invited to speak at conferences sponsored by these sections on several occasions. He is also a Past-President of the Oneida County Bar Association and a former Member of the New York State Bar Association’s House of Delegates.

Sarah Grimes joined NYSARC Trust Services as the Director of Outreach and Community Relations in 2016 to provide information and assistance to families and professionals who are seeking a pooled supplemental needs trust to qualify and maintain financial eligibility for Medicaid, Supplemental Security Income (SSI), and other means-tested benefits.

Sarah has presented on supplemental needs trusts and government benefit eligibility at events for the New York State Office for the Aging, at New York State Bar Association section meetings, and at various regional bar associations throughout New York State. She routinely provides in-service trainings to attorneys, social workers, and service providers to raise awareness for the tools that can help people protect benefits and live independently in the community for as long as possible.

She is a strong advocate for trust beneficiaries, helping the individuals maximize the benefits they receive while using the funds in their trust to provide for life-enhancing items and services.

Sarah has been working professionally in the marketing field for over 10 years and the not-for-profit sector since 2015. Sarah graduated Magna Cum Laude with a Bachelor’s in Science from Siena College School of Business (AACSB Accredited).
Hon. David Guy, Surrogate, Broome County, has served as Broome County Surrogate Court Judge since January, 2011. He is formerly President of the Surrogate’s Association of the State of NY. In addition to Broome County Surrogate’s Court, Judge Guy handles the Mental Hygiene Law Article 81 Guardianship matters throughout the 6th Judicial District and MHL Article 9 cases in Broome County, as an Acting JSC. He serves on the Editorial Board of Warren’s Heaton on Surrogate’s Court and on the New York State OCA Guardianship Advisory Committee. Before becoming Surrogate, Judge Guy was with the Binghamton firm of Coughlin & Gerhart, LLP. Judge Guy received his BS from the University of Rochester (1978) and JD from Albany Law School (1986).

Jason Hopper is the Manager of Staff Development and Training with The Arc Rockland. He was initially hired as a Residence Manager for a newly developed group home working with five wonderful individuals back in 2005. He eventually transferred to the Training Department in 2015. There, he developed and implemented various management/supervisory/clinical training programs for all staff to effectively engage the individuals in person-centered supports. Mr. Hopper is a certified SCIP Instructor-Trainer, CPR Instructor, Justice Center Investigator, and the proprietor of Hopper Trainings, LLC. He is known for his high-energy, enthusiastic discussions about the prospects for the individuals in the industry. Freedoms that were not thought possible forty years ago are attainable and Jason is passionate about getting the word out that individuals are ready to change the world for the better. Some of his most requested trainings are SCIP, Frontline Supervisor, Hostile Intruder/Active Shooter, Crisis Intervention for Administrators, Time Management, and Informed Decision Making.
Devon Juda first heard about Supported Decision Making from his parents, who are from Ballston Spa, NY. He attended an information session and learned that Supported Decision Making is a process that lets him find the people in his life that he believes can help him make the best decisions and that, most importantly, he can make those decisions for himself. Devon’s participation with both Supported Decision Making and Lexington ARC’s Transitions program has taught him a lot about how to make decisions and how to get help when he needs it. Devon is especially proud of some of his recent decisions which include enrolling at Schenectady County Community College’s culinary program and moving into an apartment in Albany, NY with supports for more independent living. Devon says: "It really feels like I belong in Albany and at SCCC. Living in Albany has helped me to make my own decisions without people trying to make them for me."

Michele Juda in addition to being Executive Director of Parent to Parent of NYS, Michele Juda is the proud parent of two boys. Her youngest son Devon was adopted from foster care and has a developmental disability and history of complex medical needs (all shared with permission.) After years of advocating for Devon in various health, education, and community-based service systems, Michele and Devon are now navigating post-secondary transition during the COVID-19 pandemic together. A proud 2020 graduate with a hard-earned local diploma and Supported Decision Making Agreement in place, Devon now sees himself as a Decision Maker and is attending a residential transitions program with the goal of competitive employment and long-term supported apartment living. Michele has added a new title as well, that of Supporter, and is acclimating to her new role.
Hon. Peter Kelly: Queens County Surrogate Peter J. Kelly is a graduate of Iona University and St. John’s University School of Law. Prior to his judicial career, Surrogate Kelly was employed in various positions in the New York City Criminal and Civil courts, and as a Principle Law Clerk in New York State Supreme and Surrogate’s courts.

Judge Kelly was elected to the New York City Civil Court in 1998, the New York State Supreme Court in 2002, and finally as the Queens County Surrogate in 2011.

In addition to his judicial duties, Surrogate Kelly has been a frequent lecturer at County and State Bar Associations as well as for various civic and charitable organizations. He is also the author of numerous decisions which have been published in the New York Law Journal and New York Reporter.

Surrogate Kelly is currently a member of the Surrogate’s Court Advisory Committee to the Chief Judge; the Administrative Board of the Office of the Public Administrators; and is Chair of the Executive Committee of the New York State Surrogate’s Association. Surrogate Kelly has also been selected as a member of the Irish Legal 100 comprised of outstanding attorneys of Irish descent in the United States.

Additionally, Surrogate Kelly is a member of the Trusts and Estates Section and the Judicial Section of the New York State Bar Association; the Queens County Bar Association; the Queens County Women’s Bar Association; the Brehon Law Society; and the Queens Catholic Lawyer’s Guild, serving as Judicial Moderator since 2009.
Dr. John Kowalczyk, Dr. John Kowalczyk, is a retired dentist from Utica, New York. He is a member of the Oneida/Lewis Chapter of the Arc New York having served in many capacities including President. He has represented his chapter for the past 30 years on the Arc New York’s Board of Governors. During his tenure as a governor, he has served on a number of committees and has held various offices. As present, he is serving his third term as President of the ARC.

After his retirement, he served as the head of an Article 16 Dental Clinic, sponsored by Upstate Cerebral Palsy, in Rome, New York. At present, he is a founding board member of the Upstate Family Health Center, an FQHC which provides primary care to the underserved in Utica, New York. He is a graduate of St Bonaventure University and the University of Buffalo, School of Dentistry.

Patricia Paduano, received her MA in Community Psychology from Sage Graduate School, previous Director of Family Support Services and Guardianship Coordinator for 34 years for Saratoga Bridges. Graduate of the 2013 Leadership Saratoga program sponsored by the Saratoga County Chamber of Commerce. Facilitator for Supported Decision-Making NY. Currently semi-retired conducting investigations and staff training for Saratoga Bridges and a member of the Guardianship Committee and a volunteer for the Northeast Regional Food Bank.
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.
**Hon. Brandon R. Sall, Surrogate, Westchester County.** Surrogate Sall graduated from the University of Miami in 1982, and thereafter from the Benjamin N. Cardozo School of Law in 1985. From October 2014 until he became Surrogate in June 2015, Judge Sall was formerly the managing member of the White Plains law firm of Sall, Geist, Schwarz & Jellinek, PLLC. Prior to that, Judge Sall was a partner in Sall & Geist from 2012 to 2014. Prior to the formation of Sall & Geist in January 2012, Judge Sall was a partner in Schuman & Sall from 1992 to 2002 and of counsel to the Yonkers law firm of Rabin, Panero and Schuman from November 1988 to July 1992. Additional, until June 2015, Judge Sall was a partner in the White Plains law firm, Gellert & Rodner, which specializes in tax certiorari matters.

Judge Sall specialized in trusts and estates and real estate law and had a significant transactional and litigation practice. In 2002, Judge Sall became general counsel to the Westchester County Public Administrator and served until June, 2015.

From 2008 to 2015, Judge Sall was a board member of the New York State Thruway Authority and serves as the chairman of the Blue Ribbon Selection Committee that chose the winning bidder for the Tappan Zee Hudson River Crossing.

In May, 2015, Judge Sall was appointed by the Hon. Andrew M. Cuomo, Governor of the State of New York, as Surrogate of Westchester County and was thereafter elected Surrogate of Westchester County in November, 2015.

In 2018, Judge Sall became a member of the Statewide ADR Advisory Committee, which has been tasked with formulating policies for the implementation of ADR throughout the court system in New York State.

Judge Sall is a member of the New York State Bar Association and the Westchester County Bar Association as well as the Trusts and Estates sections of the New York State Bar Association and Westchester County Bar Association.
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.
Wednesday, November 2, 2022
8:30 am- 9:30 am   Topic: **Guardianship Training Symposium Introductions and Keynote Session #1**
Join Zoom Meeting
https://us02web.zoom.us/j/84966428263?pwd=aWJKc3ZvSjczMVFZQm5ldCtNMzVMUT09

Meeting ID: 849 6642 8263
Passcode: 416557
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9:30 AM—10:30AM   Topic: **Session #1 (Keynote Address) - The Leadership Test: Six Questions that Transform People and Organizations**
Join Zoom Meeting
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10:45 am - 12:00 pm  **Session #2: "MOLST: Our Medical, Ethical and Legal Responsibility to Improve Quality and Honor Preferences**

**Zoom Link**

Join Zoom Meeting

https://us02web.zoom.us/j/86908247949?pwd=ZXVUTIpaMjkrOGdLNTh1bHhhNTFpQT09

Meeting ID: 869 0824 7949
Passcode: 156302
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1:00 pm - 2:15 pm  **Session #3: A View from the Bench: Guardianship and Supported Decision-Making Issues, Challenges Practices and Reform**

**Zoom Link**

Join Zoom Meeting

https://us02web.zoom.us/j/84331857196?pwd=WVJOWXhTb3pJQjFLODloV1BVYkFNdz09

Meeting ID: 843 3185 7196
Passcode: 604663
One tap mobile
+16469313860
2:30 pm – 3:45 pm  **Session #4: How Guardianship and SDM Can Coexist**

**Zoom Link**

Join Zoom Meeting
https://us02web.zoom.us/j/87617584245?pwd=anozUXpaU0FETkU2bUV4T2Z0Q0FHZz09

Meeting ID: 876 1758 4245
Passcode: 607968
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**Thursday, November 3, 2022**

8:45 am – 9:00 am  **Welcome/Housekeeping**

9:00 – 10:30 am  **Session #5: The Evolving Legal Landscape in New York State: Guardianship and Alternatives**

**Zoom Link**

Join Zoom Meeting
https://us02web.zoom.us/j/85859282747?pwd=SjQzdksrd0R5TktyQ1JLL0pWb1pkdz09

Meeting ID: 858 5928 2747
Passcode: 235678
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10:40 am - 12:00 noon  **Session #6: Informed Decision Making and the Power of Choice: Supporting Individuals in Acquiring a Rewarding Life Experience**

**Zoom Link**

Join Zoom Meeting

https://us02web.zoom.us/j/82003827015?pwd=OWZMeC9MQjJYRFhGUUwzN3AyNG0xZz09

Meeting ID: 820 0382 7015

Passcode: 305729

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Our trust programs can give people with disabilities the opportunity to remain in their communities with greater comfort and independence while providing peace of mind to their family and loved ones.

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