

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

PSA: 1

Provider: Legal Services of Northern California

Counties: Humboldt and Del Norte

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 2

Provider: Legal Services of Northern California

Counties: Shasta, Siskiyou, Lassen, Trinity and Modoc

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 3

Provider: Legal Services of Northern California

Counties: Butte, Colusa, Glenn, Plumas, Tehama

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 4

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Sacramento Senior Legal Services

Counties: Sacramento

Optional Success
Story(ies)/Case Summary(ies)

Case # 80-10-05610

A client contacted us earlier this year saying that he had been overpaid by his Supplemental Security Income several years prior in the amount of \$34,000. He had been denied an overpayment waiver, an appeal of that waiver, as well as a request for reduction of his monthly repayments, which at the time were \$110/month. The next time we talked to him, he was pleased to report that he followed our volunteer's advice to go to the Social Security Administration (SSA) and find out why his requests were denied. Upon meeting with an SSA agent, she told him that the overpayment was going to be dropped and he would once again be able to receive his full benefit amount.

Case # 80-10-11801

One client had lived in the same mobile home park for 25 years, when one day she came home and had sewage backed up in her two bathrooms which caused damage to the carpet and part of her wall paneling. Her estimate for repair was \$2,800. This same problem happened in a few homes adjacent to her, but since the other owners were at home they were able to prevent damages. The park owner and management declined to pay for damages, both insisting it was not their fault, but our advocate knew that management was in control of this common drain system, and thus should be responsible for the damage. A letter from our advocate moved the management to finally agree to pay for the damages.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Legal Services of Northern California

Counties: Yolo

Optional Success
Story(ies)/Case Summary(ies)

Client, a 69 year old mostly homebound senior, was faced with foreclosure of her property due to a lien placed by her homeowner's association for non payment of fees for 15 months. The trustee posted a notice of default followed by a notice of sale. The client sought assistance from LSNC, who contacted the trustee and negotiated a workout plan that enabled client to keep her home by making payments on the arrears over the next two years.

Client, a 72 year old disabled male, received notice that the home he was renting with voucher assistance

from Yolo County Housing (YCH) was scheduled for foreclosure sale by the bank. He had only been in the home for two months when he received notice of the sale. Working with YCH and the Yolo Family Resource Center, LSNC attorneys secured new low income housing for the client in a seniors-only subsidized housing complex with numerous amenities and accessibility features. LSNC also negotiated with the new owner after the sale for cash for keys to enable the client to pay first month's rent, the deposit, and moving costs. The client reported he was much happier in his new apartment and was enjoying the social activities.

Client, a 67 year old disabled senior, was recently told by his medical provider that he has less than one year to live due to heart complications. He has no family, but does have a boat he lives on and a dog that he loves very much and wants taken care of when he passes away. He requested assistance in preparing

for this event by completing a will, Advance Health Care Directive, and Power of Attorney. LSNC explained these documents to him and assisted him in completing them so that they captured his wishes and so he could feel like his affairs were now in order.

Client, a 63 year old female, was living in her mother's house to act as her caretaker. When the mother passed away, the house was left to the mother's five children equally. The executor of the estate tried to force a sale to settle the estate and pay out the beneficiaries. He served our client with a 60-day notice to vacate and then with an unlawful detainer summons. Client wanted to remain in the home and prevent its sale because of her emotional ties to the place where she grew up. Upon review of the summons, we realized that there were procedural irregularities with the forms Plaintiff filed. We proceeded to file a motion to quash and represented the Client at her hearing. The judge quashed the summons and client was able to remain in her family home. She is now pursuing purchase of the home through negotiations with one of our volunteer attorneys and Plaintiff's counsel.

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC staff held office hours at Rural Innovations in Social Economics (RISE), a non profit agency serving low income persons in Esparto, on the first and third Wednesday of the month. LSNC staff also held office hours the second Thursday of the month at the Yolo Family Resource Center in Knights Landing and at the Winters Healthcare Foundation in Winters on the 4th Wednesday of the month. LSNC also held its monthly clinic at the West Sacramento Senior Center on the second Monday of the month. In addition, LSNC provided a workshop in collaboration with the Yolo County Library-West Sacramento branch, on foreclosure prevention targeted at low income persons in West Sacramento.

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

The majority of attendees were older adults ages 60+.
Legal Representation: 87.4
Legal Advice Assistance: 244.25
Community Education: 8
Special Outreach: 0
Total Hours: 339.65

Provider: Yolo Sutter Legal Center

Counties: Yuba and Sutter Counties

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Legal Services of Northern California

Counties: Placer, Nevada, Sierra

Optional Success
Story(ies)/Case Summary(ies)

July 2010

LSNC advocates gave a presentation to 21 Sierra County seniors on the topic of Small Estate Administration and other non-probate estate administration tools. Advocates addressed this area of concern after receiving feedback from rural seniors concerned about their lack of access to information on these subjects.

A Loyalton senior owned her home free and clear when a home equity loan was taken out to benefit her son who had the obligation to make the payments. The son defaulted and the house was ultimately foreclosed on. LSNC paralegal, Robert Lobell staffed the case with the senior's social worker, Lori Wright (director of the Loyalton Senior Center) who in turn reported the case to Sierra County APS caseworker, Jean Newfarmer. The case of suspected financial elder abuse was investigated by Sierra County District Attorney Larry Allen who opened an elder abuse case against the client's son, as well as, against the client's grandson who made unauthorized charges on client's credit card. Both perpetrators were convicted of elder financial abuse and are now serving time for their crimes. Ms. Wright stated that without Robert's persistence and communications with the Deputy District Attorney, the case might have been dropped.

September 2010

Advocates assisted a senior who had fled her mobile home because she had fallen behind in her space rent. This senior was suffering severe memory lapses and had not consulted her physician about the problem. The senior believed that she could be prosecuted for owing rent and would have to forfeit her home. The senior had been living in a homeless shelter for several days. After speaking with a LSNC advocate and being assured that she could not be prosecuted, the senior returned to her home to deal with her budget, her late rent situation and her medical needs. With the assistance of the local Salvation Army and a grant from the federal Homeless Prevention and Rapid Re-housing program the senior was able to pay some of the back rent owed and negotiate a payment plan with the mobile home park manager for the remainder of the rent. The senior was advised to see her physician as soon as possible for the memory lapse problems and will be followed up by a social worker with the Salvation Army.

Advocates assisted a rural senior and his wife after they were notified by the water utility company that their water would be shut-off for non-payment by their landlord. The landlord had always paid the water bill for the couple and other tenants on a shared meter as part of their oral rental agreements. The couple lived in the four-plex unit for 15 years and paid their rent in cash directly to the landlord each month when he came to collect the rent. The couple did not have a phone number or address for their landlord. Over the course of 15 years, ownership of the home had changed at least three times within the original landlord's family and it was unclear even to the water utility who officially owned the home within the family – this stalled the shut-off and bought the tenants some time. LSNC provided counsel and advice regarding the couple's rights and remedies and began investigating ownership. The couple gave permission to LSNC to interview their neighbors about the identity of the landlord. Fortunately, a

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Optional Information on
Collaboration with Other
Advocacy Groups

neighbor came forward with a name and address for the owner. Ownership was confirmed and the owner was advised that LSNC was assisting the clients with their situation. He promptly paid the water bill which avoided water utility shut-off. The owner did not dispute his responsibility to pay the water bill each month. The couple are aware of their remedies if this situation occurs again.

July 2010

Staff continue to participate in multi-disciplinary financial elder and dependent adult teams in several counties.

Staff continue to participate in the Homeless Prevention and Rapid Rehousing Programs in Placer and Nevada Counties which assists seniors and other tenants who may be at risk of losing their rental housing.

A Loyalton senior owned her home free and clear when a home equity loan was taken out to benefit her son who had the obligation to make the payments. The son defaulted and the house was ultimately foreclosed on. LSNC paralegal, Robert Lobell staffed the case with the senior's social worker, Lori Wright (director of the Loyalton Senior Center) who in turn reported the case to Sierra County APS caseworker, Jean Newfarmer. The case of suspected financial elder abuse was investigated by Sierra County District Attorney Larry Allen who opened an elder abuse case against the client's son, as well as, against the client's grandson who made unauthorized charges on client's credit card. Both perpetrators were convicted of elder financial abuse and are now serving time for their crimes. Ms. Wright stated that without Robert's persistence and communications with the Deputy District Attorney, the case might have been dropped.

August 2010

Staff continue to participate in multi-disciplinary financial elder and dependent adult teams in several counties.

Staff continue to participate in the Homeless Prevention and Rapid Rehousing Programs in Placer and Nevada Counties which assists seniors and other tenants who may be at risk of losing their rental housing.

September 2010

Presentation at the Sierra County Loyalton Senior Center. Subject of presentation was tips on preventing becoming a victim of a scam. Sample letters and remedies if senior is victimized by scam. Packets handed out to each participant with resources and information.

Interviews with other senior service providers for their opinion on current needs of low-income seniors in Placer, Nevada and Sierra Counties.

Staff continue to participate in multi-disciplinary financial elder and dependent adult teams in several counties.

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Staff continue to participate in the Homeless Prevention and Rapid Rehousing Programs in Placer and Nevada Counties which assists seniors and other tenants who may be at risk of losing their rental housing.

Managing Attorney Herb Whitaker is the co-chair of the California Commission on Access to Justice's Rural Advisory Committee. The Committee published a report this month called "Improving Civil Justice in Rural California" The report can be accessed at http://cc.calbar.ca.gov/Portals/11/documents/accessJustice/CCAJ_201009.pdf

Monthly Service Units Report

Month:

Title of Service Unit	Unit	Number of Units
a. Legal Assistance	1 hour	549
b. Legal Representation	1 hour	102
c. Legal Education & Advocacy	1 hour	78
d. Total Legal Services (a+b+c)	1 hour	729

Legal Services by County

Placer	Nevada	Sierra	Total
Assistance	286	258	549
Representation	60	42	102
Community Education/Advocacy	32	17	2978
Totals	378	317	34729

PSA: 5

Provider: Legal Aid of the North Bay

Counties: Marin County

Optional Success Story(ies)/Case Summary(ies)

None Stated

Optional Information on Collaboration with Other Advocacy Groups

None Stated

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

PSA: 6

Provider: Legal Assistance to the Elderly

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

Client is a 71 year old man living in a hotel in the Mission District. He was served with a nuisance eviction based on the behavior of his 36 year old mentally disabled son, who lives elsewhere. Landlord alleged that son had caused damage to the property by kicking down the client's door and breaking two of his windows. We secured a restraining order prohibiting the son from visiting the client and negotiated a stipulated agreement with the landlord allowing the client to stay, so long as there were no future incidents.

Optional Information on
Collaboration with Other
Advocacy Groups

We continue to work with Adult Protective Services, advising and representing clients who are referred to us. These clients typically are tenants who are facing eviction, or the victims of physical or financial abuse.

On September 14th our Executive Director participated in a statewide meeting of legal service Executive Directors convened by the Legal Aid Association of California and the State Bar of California. Agenda items included IOLTA funding, strategic planning, effective cost cutting and the implementation of Assembly Bill 590 (Feuer), the Sargent Shriver Civil Counsel Act.

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: **Nihonmachi Legal Outreach dba API Legal O Outreach** Counties: **San Francisco**

Optional Success
Story(ies)/Case Summary(ies)

-"Kim" - 90+ year old elderly monolingual, Korean woman, illiterate. Was able to pass the naturalization exam with the help of APILO.

-"Santos" - 60+ year old elderly Filipino man, was able to pass naturalization exam.

-"Buena" - 70+ year old Filipina woman, after naturalizing, was helped with Child Status Protection Act to retain children's visa category. Children can be processed now, instead of several years later.

-Elderly man received a letter and a legal summons from a collection agency. He is not literate in English and had a worker at a senior center look at it. They brought the client to our office. Upon reviewing the letter and explaining things to client, he insisted the debt was not his. This was a credit card matter and client said he never had a credit card. We suspected ID theft. After running a credit check we found that the debt was not our client's. The collection letter was to a person with a similar name but not the exact name of our client. Example: real debtor's name is John James Carson, but my client's name was James K. Carson. We wrote a letter to creditor and submitted information to the court so the case was dismissed.

Both clients were extremely agitated and upset by these letters and didn't know what to do when they came to us.

Optional Information on
Collaboration with Other
Advocacy Groups

As founders of the Asian Pacific Islander Elder Abuse Task Force, partnerships and collaborations are essential for effective advocacy. Meaningful working relationship with organizations such Self-Help for the Elderly, Kimochi, On Lok, Protection and Advocacy, Veterans Equity Center, Canon-Kip, Adult Protective Services, the District Attorney's Office, the Mayor's Long-Term Care Council and the API Partnership for Community-Based Care and Support helps to strengthen services, provide technical assistance and training about the prevalence of elder abuse and the availability of culturally and linguistically competent resources.

As a result of API Legal Outreach's work in elder abuse, we have been fortunate to be placed with a one year full time fellow from the Bochard Foundation to help with providing greater outreach support and to provide training to break the cultural and linguistic barriers. The fellow is charged with the following:

Establish and convene an Advisory Committee for my project. Advisory Committee members will represent agencies serving both senior citizens and/or the API community. Engage in outreach to existing and new partner API and other legal and CBOs in the San Francisco Bay Area. Work collaboratively with Advisory Committee members to develop API inclusive and sensitive training curricula and presentation modules.

Conduct cultural sensitivity in-service trainings for APILO and other service providers. Provide legal consultations to API seniors around elder abuse issues. Make referrals to APILO and other attorneys.

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Distribute education and training materials to local partner agencies. Contact minority bar associations to develop pro bono and private referral list.

Conduct 'know your rights' trainings and community presentations for API groups and individuals. Engage in targeted ethnic media outreach. Conduct cultural sensitivity trainings for law enforcement on how to respond to elder abuse in the API community.

Continue trainings, community outreach, consultations, referrals, limited legal representation and targeted ethnic media outreach. Perform evaluation of project's success through interviews and survey distribution. Draft article on elder abuse issues in the API community.

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

Optional Success
Story(ies)/Case Summary(ies)

July Client: Spanish-speaking elder attended La Raza Senior Law Clinic requesting assistance in regards to addressing a court summons for an overdue hospital bill. The senior was on a fixed income and without any health insurance. Due to meager savings, which the client was using to pay his mortgage, he did not qualify for charity care or government health subsidies. As a result, we were forced to work with the hospital and the collection agencies to set up a payment plan. While this will still be a financial strain on the senior, we were able to lower the overall debt and avoid court.

August Client: A low income senior attended La Raza Senior Law Clinic seeking help with a debt collection. She had borrowed money from a lender to assist her mother with medical bills. Due to the economy, she was having trouble finding work and thus unable to pay back the debt. Since she was not at retirement age and still working, her income was not judgment proof. After several meetings, we were able to work out a deal with the lender that cut her overall payment in half, if she paid in full. The senior was able to gather the money needed from a family friend to pay for the debt. After closing the debt with the lender, we assisted the senior in setting up a payment plan so that she could pay back the friend over a short amount of time.

September Client: An unemployed differently able bodied man came to La Raza Senior Law Unit needing housing assistance in order to keep his rent controlled apartment. The senior and his wife had been living in a small apartment with his mother since his mother signed the lease on the unit in 1980. He was 16 years old at the time and a minor, thus he did not sign the lease. His mother had recently passed away, and his landlord had filed a Costa Hawkins order with the Rent Board in an attempt to claim that the son was not an original tenant and thus should be required to pay market value rent. Over the course of several months working with the senior, we were able to assist the senior in gathering several documents that established his tenancy in the apartment using old receipts, high school report cards, hospital bills and records, as well as expired identification cards. While the owners of the building had changed a few times over his tenancy, the client had at one time paid rent directly to a prior owner, thus establishing him as a co-tenant and not a subtenant. He also managed to keep the receipt from that rent payment and was able to use it at his rent board hearing. With all the evidence in support of the client's tenancy, the client was able to fight off the Costa Hawkins petition and maintain his apartment at the current rate which allowed him to stay in his home.

Optional Information on
Collaboration with Other
Advocacy Groups

This past quarter was a bit challenging; we had a lot of internal activities and planning taking place and unfortunately lacked sufficient capacity to work outside with collaborators out of our DAAS-LSA circle. We were quite engrossed in advocating that our senior law program continue it's funding, however, coordinating and planning events within our organization that would benefit our senior clientele.

We have been in serious communication with Senior Action Network to bring a Senior University to La Raza clients. We hope to have a Senior University* at Centro del Pueblo this coming fall and the topic will be housing, we are very excited about this. Also, we hosted a workshop for our seniors, which took

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

a lot of planning and organizing. In mid-summer (July 28, 2010), we held a workshop and the topics introduced are those that hit close to their survival: Social Security Benefits. Although, we invited close to 100 elders to this event, we had a turn out of 18. This has been the first event of this nature that our unit has hosted and hope to present more topics in the near future. From this experience, we learned that we need to do more outreach to our collaborators but due to timing we lacked this detail.

This past quarter we continued providing services to our clients at the same or better capacity. We continue to be grateful that we are able to assist these elders in legal matters. We continue to have a great relationship with our collaborators, some of which are our friends at Planning for Elders, Senior Action Network, Social Security Office and look forward to strengthening our relationship with all Senior Legal Service Providers and Health Service Providers. *Senior University is a Senior Empowerment Program that is funded by San Francisco City and County General Funding. It is a multi-lingual and culturally diverse four session class for seniors and persons with disabilities in San Francisco. The school aims to provide students with formal training on how to affect change in the civic/political process through advocacy and volunteerism.

Provider: Asian Law Caucus

Counties: San Francisco

Optional Success Story(ies)/Case Summary(ies)

One recent win involved a 70-year old woman whose application for resident status had been approved in 2008. In 2009, the Department of Homeland Security realized that it had not checked her elderly U.S. citizen husband's background as required, and found a conviction that disqualified him from sponsoring her. Under legislation originally intended to protect immigrants from being victimized by their US citizen sponsors, the government rather bizarrely announced that it planned to deport her to the Philippines. We negotiated a way for her to keep her resident status using a little-known waiver, and got both Immigration and Customs Enforcement (ICE) and the Immigration Judge to agree.

Optional Information on Collaboration with Other Advocacy Groups

None Stated

PSA: 7

Provider: Contra Costa Senior Legal Services

Counties: Contra Costa County

Optional Success Story(ies)/Case Summary(ies)

None Stated

Optional Information on Collaboration with Other Advocacy Groups

None Stated

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

PSA: 8

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

Optional Success
Story(ies)/Case Summary(ies)

“Judy” a senior residing in Redwood City had her adult son living with her. As with most parents, she believed in her son and wanted to do what was “best” for him and when he said he had no other place to live, she let him stay in her home. However, “Mark,” her son, was verbally and physically abusing her and the Redwood City police had been out to her house 14 times in one year before she finally got the courage to contact Legal Aid for an elder abuse restraining order. Our Legal Aid attorney applied for a temporary restraining order and then at the court hearing, obtained a 3-year restraining order removing her son from home and ensuring her ongoing safety.

Optional Information on
Collaboration with Other
Advocacy Groups

We have attended meetings for Commission on Aging and Adult Abuse Prevention Collaborative. We conducted presentations and clinics at the Pacifica and San Carlos Senior Centers and Safe Harbor Homeless Shelter. We continue to receive referrals and calls for technical assistance from the Ombudsman program and AAS.

PSA: 9

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Legal Assistance for Seniors

Counties: Alameda

Optional Success
Story(ies)/Case Summary(ies)

Mr. TC, a chronically ill client was hospitalized with pneumonia, and then at wife's request, was transferred by ambulance to UCSF where his family doctor practices. Medicare denied payment for the \$3,000 ambulance bill on the basis the trip was not medically necessary. The ambulance company sent a bill to the client but the client had not yet received any documentation from Medicare.

Mr. TC and his wife contacted Legal Assistance for Seniors seeking help in resolving this situation. After hearing the client's story, LAS' Advocate called Medicare and requested a Summary Notice be sent to the client. She then called the doctor, with the client's permission, to request a letter documenting medical necessity. This would form the grounds for an appeal of the denied claim. The Medicare Summary Notice confirmed that a "lack of medical necessity" was the reason for the denial of payment for the ambulance trip. The Advocate called the doctor's office two more times to remind him to complete the letter of medical necessity for the appeal. Once she had the doctor's letter, the Advocate drafted the appeal to Medicare, stating that the client could not have been transported safely by any other means.

Within two weeks, Mr. & Mrs. TC were notified that Medicare had paid the claim. The Advocate informed them that they could send the new Medicare Summary Notice to their secondary insurance for payment of their share. The secondary insurance company accepted the notice and paid the remainder of the bill, resulting in the client simply owing \$45.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Assistance for Seniors (LAS) has been awarded a contract by Alameda County APS to serve clients suffering from or at risk for elder abuse by providing legal services for clients in need of legal advice and/or protections. LAS has also been awarded the Alameda County HICAP contract and provides HICAP counseling services as well as legal services for HICAP clients. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal guardianship of minors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. LAS has been awarded contracts by the State Bar of California and the cities of Fremont, Hayward, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

PSA: 10

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Fair Housing Law Project

Counties: Santa Clara County

Optional Success
Story(ies)/Case Summary(ies)

FHLP recently closed a case in which an elderly couple was victimized by a foreclosure rescue scam. The foreclosure rescue company and its agents took title to their home and evicted them from the home. FHLP filed a lawsuit in state court on the clients' behalf and was able to obtain the return of the clients' equity in their home in the amount of \$55,000.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

Provider: Senior Adults Legal Assistance (SALA)

Counties: Santa Clara County

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

For the First Quarter of 2010-11, SALA provided on-site legal service intake appointments at 23 senior centers or sites in Santa Clara County. These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center (San Jose), Iola Williams Senior Center (San Jose), Eastside Senior Center (San Jose), Mayfair Community Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Kirk Senior Center (San Jose), Almaden Senior Center (San Jose), Evergreen Senior Center (San Jose), Southside Senior center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.

For the First Quarter of 2010-11, SALA attorneys also participated in a meeting of the Public Benefits Task Force and of the FAST II committee.

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Council for the Spanish Speaking

Counties: San Joaquin

Optional Success
Story(ies)/Case Summary(ies)

Senior Legal Services, during the month of August, assisted a veteran who also worked for the Federal Government and receives a civil service pension. The client moved in December 2009 but never reported any changes to the U.S. Office of Personnel Management because he did not know how. With our assistance, he reported all the necessary changes and also set up direct deposit for the client. Unfortunately, the client had not received five checks as they were going to the wrong address and were not returned. We placed traces on all the checks and a couple of more recent checks were reissued to the client. We are glad we had the opportunity to assist the client as he only receives approximately \$300.00 from SSA. Client expressed a lot of gratitude.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 12

Provider: Catholic Charities

Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 13

Provider: Senior Citizens Legal Services

Counties: Santa Cruz County & San Benito County

Optional Success
Story(ies)/Case Summary(ies)

This section will be completed as part of the 4th Quarter / Annual Report.

Optional Information on
Collaboration with Other
Advocacy Groups

This section will be completed as part of the 4th Quarter / Annual Report.

PSA: 14

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Central California Legal Services

Counties: Fresno and Madera Counties

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 15

Provider: Sarah Shena, Tulare Co. Senior Legal Serv **Counties: Tulare**

Optional Success
Story(ies)/Case Summary(ies)

1. This quarter we arranged to have the AAA Nutrition staff distribute information about the Senior Legal Services program, and two in-house fact sheets re consumer protection to consumers of home-delivered meals.
2. We also gave the consumer protection fact sheets to HICAP and the Information & Assistance staff for distribution to their clients.
3. We received our first referral from a leader in the Southeast Asian community (one of his relatives). This is significant and we believe will make it easier to do future outreach to this community, which has been difficult to reach.

Optional Information on
Collaboration with Other
Advocacy Groups

1. Sequoia Community Mediation Center: Our advocate's participation in the governing committee of this group continues. Community awareness about the Center handling matters other than family law has increased to the point that calls about consumer, tenant and neighbor issues are fairly common.
2. In collaboration with United Way of Tulare County I was able to get Advocate of the Year recognition for one of our volunteer attorneys and his wife. This occurred at an annual community event of 400+ people; the award was presented by the former long-time director of our AAA.
3. I worked with HICAP, our Nutrition Staff and Information & Assistance Staff to get more of my articles and information about my program distributed throughout the county (details above).
4. Other collaboration continues as previously reported.

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Central California Legal Services, Inc.

Counties: Kings County

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 16

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: California Indian Legal Services

Counties: Inyo & Mono

Optional Success
Story(ies)/Case Summary(ies)

1st Quarter Activity:

Case #1: An elderly client called our office to request assistance regarding his propane service bill. We requested that the client bring in the propane bills during the intake appointment. Two days later the client came into our office stating that his propane service had just been shut off. Our staff gathered the facts and researched public utility requirements for termination of utility services and the special rules regarding the elderly. We sent the propane company a letter outlining the issues, current rules and requested copies of the legally required notices. After no response to our letter, we then directly contacted the local propane office to inquire into the matter and during the discussion management of the propane service provider decided to reinstate service immediately for our client. Additionally, the propane company then extended the courtesy to assist our client in applying for Low Income Housing and Energy Assistance Program (LIHEAP) benefits. That afternoon we received a call from our client that the propane service had been re-established.

Due to the recent economic downturn and over the past year our legal services has seen a tripling in the request for debt relief assistance for local Seniors. Here are a few of their stories:

Case #2: An elderly couple was served with a summons and complaint for a debt. Upon review of the facts and situation it was determined that the couple were reliant on Social Security benefits, their only source of income, and had no assets for conversion for payment of the debt. The husband's self employment as a real estate agent had come to a halt when the housing market crashed. Filing for bankruptcy was not an option for the clients as this would prohibit the husband from working as a real estate agent. Further review revealed the clients had other large debts to other creditors totaling about \$80,000. We assisted the clients in drafting a Response to the court outlining their plight and need for relief from the court.

Case #3: An elderly client contacted our office because of harassing and threatening calls from a collection agency on a debt. The client had been unable to make payments on this debt due to loss of income and economic difficulties. We educated the client of his rights under the Fair Debt Collection Act. We also drafted a letter for the client to request the collection agency cease in the aggressive and harassing collection methods. The collection agency must now stop the harassing phone calls and must respond to the client in writing with a full disclosure of the original creditor and the history on the account.

Case #4 A walk-in client came into our office with a copy of her credit card bill and showing a charge for \$79 for which she didn't consent to nor did she understand what it was for. After discussing the issue and informing the client of the fine print on "how to dispute your bill" information we contacted the credit card company with the client present. The credit card company stated the charge was for a magazine subscription. The client stated she never requested the magazine subscription and requested this transaction be credited to her account. The credit card company representative agreed to cancel the charge and reverse the costs to the client's credit card account. We drafted a letter for the client to memorialize the cancellation and the credit card company's agreement to credit her credit card account for the client to send to the credit card company.

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Optional Information on
Collaboration with Other
Advocacy Groups

IMSLP retains an active role on the local area agency on aging Advisory Council and a local grassroots senior services group known as the Frail and Elderly Taskforce. Additionally, we continue to have ongoing working relationships with the local HICAP staff and local Ombudsman program staff.

PSA: 17

Provider: Central; Coast Commission for Senior Citizens Counties: Santa Barbara and San Luis Obispo Counties

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 18

Provider: Grey Law of Ventura County

Counties: Ventura

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 19

Provider: Bet Tzedek Legal Services

Counties: Los Angeles County

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 20

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Inland Counties Legal Services, Inc

Counties: San Bernardino

Optional Success
Story(ies)/Case Summary(ies)

Client requested the services of ICLS because he had been served with a Summons & Complaint demanding \$4,047 for breach of contract. Client was accompanied by his wife, both who are monolingual Spanish speakers. They were very concerned and didn't know how to file an answer. We reviewed the client's documents and determined that the previous collection agency had agreed to settle for \$2,000, which the client stated he had paid. Client wasn't aware that he had written confirmation that the debt had been settled in full and they just needed to provide a copy of the letter to opposing counsel and did not need to file an answer to the complaint. The client took this action and the dismissal with prejudice has been filed with the court.

Client was referred to us by Adult Protective Services. Client rented two rooms to a couple who had a baby. Later, the couple brought an older child to the home. Client was very upset and frustrated that the rent was not being paid and it appeared that the couple was not going to be paying anytime soon. Client was advised about the eviction process. We assisted the client in serving the 3-day notice, as well as the complaint. At the trial, the client did very well in his testimony. The Judge ruled in client's favor and a judgment was issued against the couple. The couple moved out before the Sheriff could serve the Notice to Vacate. Client was very happy that they were out of his home.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 21

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

Optional Success
Story(ies)/Case Summary(ies)

Our client was collecting unemployment while trying to get her real estate business going. EDD terminated her unemployment and charged her with a disqualification for not reporting her employment and an overpayment which included a penalty. EDD also alleged she was not able and available for work. The client did not report her job because the column states "report earnings". The client had not made any earnings. She had only been reimbursed for expenses. We went to hearing and argued that working part time trying to sell homes is no different than if client was in school (meaning she could do both). She was doing most of the real estate work on the weekends. We argued that our client was able and available for work and had work been offered to her, she would have accepted it. We argued that our client did not deliberately fail to report her income. She had not reported it because it asked only for earnings. We also argued that the client had a good standing in the community and a real estate license is not something she would risk losing. We won at the hearing and the Administrative Law Judge removed the disqualification and the overpayment and now client is entitled to her retro benefits of \$450 per month as of the end of April. Client was very happy.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 22

Provider: Legal Aid Society of Orange County

Counties: Orange

Optional Success
Story(ies)/Case Summary(ies)

We recently represented an 86 year old Orange County resident. She is living in an assisted living facility and is under hospice care. She was sued for over \$10,000 on a credit card debt. Due to some issues concerning service of the Summons, we filed a Motion To Quash Service. After discussing the case with the opposing attorney, plaintiff agreed to dismiss the lawsuit.

Optional Information on
Collaboration with Other
Advocacy Groups

1.Meet with a representative of UCI Law School to discuss the possibility of establishing a Social Security/SSI Clinic.

PSA: 23

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Elder Law & Advocacy

Counties: San Diego

Optional Success
Story(ies)/Case Summary(ies)

NOT APPLICABLE FOR THIS QUARTER.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 24

Provider: Elder Law & Advocacy

Counties: Imperial County

Optional Success
Story(ies)/Case Summary(ies)

NOT APPLICABLE FOR THE PERIOD OF 7/1/10 – 9/30/10.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THE PERIOD OF 7/1/10 – 9/30/10.

PSA: 25

Provider: Bet Tzedek Legal Services

Counties: Los Angeles City

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 26

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Senior Law Project, Inc

Counties: Lake and Mendocino Counties

Optional Success
Story(ies)/Case Summary(ies)

Clients, an elderly couple in their mid-80's, came to Senior Law Project after their claim for travel/trip interruption insurance had been denied. Mrs. X had been hospitalized briefly during a European vacation and was advised not to continue the trip. Clients had attempted for many months to obtain benefits under a travel insurance policy. Senior Law Project reviewed the policy provisions and evidence of hospitalization and assisted clients with an appeal of denial of coverage. The appeal was successful and clients were awarded \$8,700.00 under their policy. Without Senior Law Project's intervention, this result would likely not have been obtained.

Optional Information on
Collaboration with Other
Advocacy Groups

Senior Law Project continues to provide legal support to HUD certified foreclosure prevention counselors at California Human Development Corporation and received referrals of clients from that agency. Senior Law Project continues to collaborate with IHSS Advisory Committees in both Lake and Mendocino Counties. Senior Law Project continues to collaborate with California Advocates for Nursing Home Reform and other advocacy organizations in connection with the issue of improper eviction from residential care facilities. The advocacy is focused on development of new regulations for Community Care Licensing applicable to RCFE evictions.

PSA: 27

Provider: COUNCIL ON AGING

Counties: Sonoma

Optional Success
Story(ies)/Case Summary(ies)

1. August 2010, Lisa Greenfield (paralegal) represented a client with a Social Security over- payment of approximately \$60,000. A reconsideration request was filed on behalf of the client and approved by Social Security. Therefore, the client will not have to pay back \$60,000 to the Social Security Administration.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 28

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Legal Aid of Napa Valley

Counties: Napa

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

Provider: Legal Services of Northern California

Counties: Solano

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Continued collaboration with Ombudsman Services of Northern California and Senior Legal Hotline.
Continued participation in FAST, Solano Senior Coalition, and Vallejo Senior Roundtable.

PSA: 29

Provider: Senior Legal Services

Counties: El Dorado County

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 30

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: California Rural Legal Assistance

Counties: Stanislaus

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

8/9/2010 AAA Commission Meeting
7/21/2010 SEAPA Meeting
7/7/2010 STOAAC Meeting

PSA: 31

Provider: Central California Legal Services

Counties: Merced

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 32

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2010-2011

Quarter: 1

Provider: Legal Services for Seniors

Counties: Monterey

Optional Success
Story(ies)/Case Summary(ies)

Client's husband died unexpectedly. Client was heartbroken and not able to care for herself for a period of time. Client lived in a Section 8 subsidized apartment. The subsidy changed to allow only our client, no one else, to live in the unit. Because our client remained grief-stricken for some time, her extended family members came by often to check on her and help her get back into the mainstream. Client's neighbors either misunderstood our client's situation or otherwise did not approve of her visitors and so complained to the landlord, stating our client had family members living in her unit in violation of her §8 subsidy. Client received a letter of reprimand and hearing from the Housing Authority of Monterey County (HA) stating she was in violation of her lease and would have to appear at a HA hearing to defend herself (against the unwarranted and untrue claims). An LSS advocate reviewed the HA's case file and accompanied our client to the informal HA hearing. Because our advocate was able to point out the untruth of the neighbors' claims regarding family members living with our client, the complaint was dropped and our client was able to remain in her home with no violation on her record. Our client would not have been able to maneuver through the HA regulations on her own, and without LSS intervention, likely would have lost her HA hearing and been evicted from her home.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Services for Seniors serves as the legal assistance arm for the Area Agency on Aging's HICAP program. Given that Legal Services for Seniors is a law firm and so is bound by the regulations of client confidentiality, LSS is still able to communicate with and assist other non-profits organizations (such as the Ombudsman, Family Ties and others) on law that pertains to and affects those agencies' senior clients.

PSA: 33

Provider: Greater Bakersfield Legal Assistance, Inc.

Counties: Kern

Optional Success
Story(ies)/Case Summary(ies)

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated