

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

Fiscal Year: 2010-2011

Quarter: 3

PSA: 1

Provider: Legal Services of Northern California

Counties: Humboldt and Del Norte

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

None Provided

Optional Information on
Collaboration with Other
Advocacy Groups

None Provided

PSA: 2

Provider: Legal Services of Northern California

Counties: Shasta, Siskiyou, Modoc, Trinity and Lassen

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

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Fiscal Year: 2010-2011

Quarter: 3

Provider: Legal Services of Northern California

Counties: Yolo

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

The client, an 83 year old limited English proficient woman, was involved in a major automobile accident with her daughter. Her daughter was seriously injured and has been unable to work as a result of the injuries she sustained in the accident. Client had co-signed on her daughter's credit card account and her daughter stopped paying after the accident because she could not afford to make payments and pay for necessary expenses. The bank began placing collection calls daily seeking to force client to pay on her limited, fixed income. The calls became increasingly more hostile and harassing, causing the client great distress. Client sought assistance from LSNC. LSNC attorneys tried to work out a settlement with the credit card company but they demanded a monthly payment that was ¼ of the client's monthly income. LSNC attorneys stopped the harassing phone calls after writing several letters advising the company that continued harassment would result in a lawsuit for violations of the Fair Debt Collection Practices Act. Client has not received any phone calls from the creditor for the past month.

Client, a disabled low income senior who resides in a Mobile Home Park, was served with an eviction lawsuit for failing to maintain the outside of his premises in good condition. He contacted LSNC for assistance when he was unable to answer the lawsuit or make the necessary repairs. LSNC's Senior Link program connected him with a local group who handle small repairs and yard clean up jobs for disabled seniors. LSNC's attorneys represented the client in his unlawful detainer lawsuit and settled the lawsuit before trial. The client was able to remain housed in his Mobile Home and will have yearly assistance with yard maintenance to avoid future lawsuits.

The client, a 66 year old limited-English proficient client, was threatened with eviction after her apartment complex was purchased through a bankruptcy proceeding and the new management company raised rent by 800%. On her fixed income, she was unable to afford the rent. She contacted LSNC after receiving an eviction lawsuit. LSNC staff intervened and secured a settlement agreement enabling the client to remain housed in the unit with reduced rent.

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC staff held office hours at the following locations: Rural Innovations in Social Economics (RISE), a non profit agency serving low income persons in Esparto, on the 1st Thursday of the month; the West Sacramento Senior Center on the 2nd Monday of the month; and the Yolo Family Resource Center in Knights Landing on the 3rd Thursday of the month.
Legal Representation: 53.10
Legal Advice/Assistance: 193.45
Community Education: 6.50
Special Outreach: 0
Total Hours: 253.05

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Provider: Sacramento Senior Legal Services

Counties: Sacramento

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

A firm letter and follow-up communications from volunteer attorney Duane Phillips convinced the owners of a Sacramento mobile home park to make and pay for repairs to a 68-year-old resident's badly clogged sewerage lines and for damages caused to her unit from sewage backups.

Optional Information on
Collaboration with Other
Advocacy Groups

Staff and VISTA members worked with the California Department of Public Health to field test outreach materials aimed at seniors about CalFresh.

Foreclosure experts on staff worked with counselors from numerous other agencies, in and out of Sacramento, who referred clients to SLH/SSLS for legal assistance under auspices of the National Foreclosure Mitigation Counseling program.

Manager David Mandel communicated frequently with senior legal advocates from around the country regarding reauthorization of the Older Americans Act.

Various staff and VISTAs helped out at LSNC's annual Valentine's Day fund-raising run.

Staff developed contacts with people in the domestic violence victim assistance world for training our staff and collaborating on outreach to older victims.

David met with other advocates at the California Wellness Foundation's Healthy Aging conference March 28-29 and at the Elder Financial Protection Network's Call to Action event March 31. Both were in San Francisco.

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Provider: Legal Services of Northern California

Counties: Placer, Nevada, Sierra

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

January 2011
Staff prevented loss of low-income subsidized housing for a frail senior. This Placer senior was being terminated from her home because she could not resist "allowing" her violent and abusive son to enter the common areas of her apartment complex.

Optional Information on
Collaboration with Other
Advocacy Groups

January 2011
Advocates continue working with our partners in the Homeless Prevention and Rapid Rehousing program to assist seniors facing loss of housing. Partners in Placer County include the Salvation Army, KidsFirst and the Sierra Aids Foundation.

February 2011
Mother Lode Regional Office continues to participate in the Multidisciplinary Elder Team which reviews elder abuse cases in Placer County.
Advocates continue working with our partners in the Homeless Prevention and Rapid Rehousing program to assist seniors facing loss of housing. Partners in Placer County include the Salvation Army, KidsFirst and the Sierra Aids Foundation.

March 2011
Advocates continue working with our partners in the Homeless Prevention and Rapid Rehousing program to assist seniors facing loss of housing. Partners in Placer County include the Salvation Army, KidsFirst and the Sierra Aids Foundation.

Provider: Yuba Sutter Legal Center

Counties: Sutter and Yuba Counties

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 5

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Quarter: 3

Provider: Legal Aid of the North Bay

Counties: Marin

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

V

PSA: 6

Provider: Asian Law Caucus

Counties: San Francisco

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

We have two case highlights to share this month related to San Francisco Housing Authority. The first involves a monolingual elderly woman living with a disability (cancer). She was living in public housing with her husband, but when she divorced, she lost her housing (while the ex-husband was allowed a housing unit). After a year of back and forth with SFHA, ALC was able to force the agency to place her on a waiting list for permanent housing.

In a second case, a monolingual Cantonese speaking woman was taken off the SFHA waiting list due to what was characterized by the agency as a failure to receive responses to requests for information. ALC was able to get her back on the waiting list in her original place because we proved that they were sending the requests for information to the wrong address.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

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

January Client: Spanish-speaking senior resident attended La Raza Senior Law Clinic requesting assistance in regards to a savings account held in El Salvador. The bank sent him a notice stating that the account was declared inactive and the funds frozen. Information regarding the owner of the funds, source of the money and dates of the deposits was required in order to free the funds. After a long exchange of information with the bank, our client was finally able to have access to his savings, the product of his lifetime effort.

February Client: A Spanish-speaking only senior resident came to our La Raza Senior Law Clinic seeking help with a SSDI application. We learned that his application was denied several times before so we helped him to gather and organize the needed documentation in order to complete his application. After several meetings we were able to send to the Social Security Administration all the required information. After several weeks he finally received his first paycheck from SSDI.

March: A disabled client came to La Raza Senior Law Unit needing housing assistance in order to negotiate a relocation agreement after the home he was renting out was foreclosed by a bank. He has been a tenant for 7 years and needed money to find a suitable place. With the help LRCL Senior Unit he as able to assert his rights as a protected tenant under PTFA. He was awarded \$5,000 for relocation expenses. However, a couple of days later he received a notice of filing an unlawful detainer complaint by the bank that included his name on it. LRCL helped him to prepare an answer to the legal action and the respective fee waiver forms. We also contacted the attorneys for the bank to inform them that our client vacated the unit. Afterwards, they filed a request for dismissal for the entire action, so the name of the client would not found in this unlawful detainer case.

Optional Information on
Collaboration with Other
Advocacy Groups

This past quarter was quite intense. We are moving forward to our goal to do more presentations for seniors around the City. Following this path, we did our first presentation at the Bernal Heights Senior Center on estate planning and medical directives issues with great attendance. We plan to hold several other presentations in different senior centers over the next months.

This year our program will have a law student for the summer, reestablishing an initiative that was halted during the past two years. Our summer intern will help us, among other duties, to do more outreach for our program and help more seniors of San Francisco.

We are also excited as we received OTO funding from the State via DAAS for supplies and training. With this extra funding we plan to acquire a complete set for simultaneous interpretation including wireless headphones and IT hardware to go around doing our presentations such as a portable screen, laptop and projector.

This past quarter we continued providing services to our clients at the same or better capacity. We are very active in our collaboration with other legal organizations to have the Seniors Rights Bulletin

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published quarterly. We helped authoring some articles and edited the Spanish translation of the different articles published. We continue to grateful that we are able to assist these elders in legal matters.

Provider: Legal Assistance to the Elderly

Counties: San Francisco

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

Client is a 66 year old white male SSI recipient, who resides in section 8 housing in the Tenderloin. He received a letter from the San Francisco Housing Authority indicating that his subsidy had been terminated for failure to submit his annual income certification form. Client indicates that he never received the forms. We assisted him in requesting an informal hearing in the matter and his subsidy was reinstated.

Optional Information on
Collaboration with Other
Advocacy Groups

Our Executive Director, Howard Levy, is participating in a statewide group of senior legal service providers, who meet via telephone on a regular basis, to discuss statewide issues of concern including funding, training and capacity issues. This group is facilitated by staff from the Legal Aid Association of California.

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Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

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

Some of the immigrants we work with come from countries that criminalize unpaid debts. Where an individual can be imprisoned if they refuse or are unable to pay off a debt. Couple that with unethical collection agencies that may not follow the laws and make illegal contacts or make untrue statements to a debtor, including threats of deportation or jail, we then have a population living in fear and stress.

There are a variety of laws that provide protection to consumers and parameters to collection agencies in such situations. But due to cultural beliefs, mores and lack of information or misinformation, many of our seniors are not aware that there may be options available to address their debt problems.

Many seniors who have sought our help have tried unsuccessfully to pay off their debt, but the fees and costs associated with a low income cardholder are usually so high the senior is never able to catch up. On review a few of our cases have involved credit card debt where the fees and costs was the major portion of the debt, not the purchases made by the senior.

An example:

Card issues to a low income, low resource senior with a credit limit of \$300

Interest is 20%+

Over credit limit fee \$39

Late fee \$39

Non use fee \$39, (if card "inactive for a certain period of time)

The contract outlines these fees and the issuing of the card may not rise to the level of abuse, but it can cause problems and abusive problems for seniors when they incur a debt they can not handle. In these cases, we are able to educate the seniors and/or represent them in these matters.

Optional Information on
Collaboration with Other
Advocacy Groups

As mentioned in the previous report, API Legal Outreach has expanded limited housing legal service primarily in South of Market (SOMA) area based on community request.

For this reporting period, in addition to referrals from Bishop Housing and Eviction Defense Collaborative, we continue to conduct housing related presentations and outreach to Canon Kip and West Bay Filipino Center throughout South of Market. We are receiving referrals and we are representing seniors in eviction cases. Many of their situations are difficult since it involves property sales. We are fighting for them to stay, and even if their situation is such that they cannot stay in SOMA, then we are working to protect their record and ability to obtain rental housing in the future.

In the SOMA area one repercussion of the entire mortgage crisis is that an onslaught of individuals who lost their homes due to foreclosure or short sales are now in the rental markets themselves, exacerbating an already over-saturated rental market in San Francisco. Ninety percent of SOMA residents are renters. So this particular area of the City and County is particularly vulnerable to this

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rippling effect. Moreover, the budget cuts at all levels of government adversely impacts the abilities of low wage workers and other economically marginalized segments of the SOMA community. The cut to funding for housing-related services and support comes at a time when these services are needed the most.

Through the SF SOMA community stabilization fund, there are some advocacy efforts to increase affordable housing stocks in this area for families and seniors.

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

PSA: 8

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Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

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

Ms. E, a 61 year old, County resident, had exhausted her life savings. Although she owned her condominium free and clear, she had no income to pay her \$400/monthly Home Owner Association fees and was in danger of losing her home if the HOA followed through on their threat to enforce a lien to collect the several month of fees owed. She was too young to collect SSI and had no current skills with which she could obtain a job. In a few months, she will be old enough to qualify for a reverse mortgage that will give her income to pay her HOA fees. But the HOA would not extend her any more time. Her only hope was to obtain General Assistance through the County, but there is a \$1,000 real property limit to qualify so she was initially denied. Our Senior Advocates Directing Attorney knew that the County Self Sufficiency Director has discretion to grant exceptions where the cost of maintaining the home was no more than the GA grant. Although the \$400 HOA fee was more than the GA grant, Legal Aid was able to negotiate with the HOA to accept the GA grant amount until Ms. E could obtain the reverse mortgage. With that agreement, Legal Aid was able to advocate for an exception to the GA property limit, which the director granted. Several weeks of negotiating and advocating has enabled this senior to keep her housing and avoid having to go into the emergency shelter system.

Optional Information on
Collaboration with Other
Advocacy Groups

We have been working with HERA (Housing and Economic Rights Advocates) on a case of predatory lending and elder financial abuse. We are also in the process of working out a project with PCRC (Peninsula Conflict Resolution Center) for a direct referral system for seniors who need mediation services.

We also currently collaborate with/attend meetings for:

- Aging and Adult Services –
 - oCommission on Aging
 - oAdult Prevention Collaborative
 - oLegislative and Advocacy Committee
- CANHR's Lawyer Referral Panel Committee
- LAAC
 - oSenior Legal Service Providers Steering Committee
 - oModel Approaches Grant Advisory Committee

PSA: 9

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Provider: Legal Assistance for Seniors

Counties: Alameda

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

Our client came to LAS seeking help in obtaining guardianship of his two grandchildren, a boy (age 6) and a girl (age 8). The children's parents were unable to care for them because of substance abuse problems and the mother has a history of incarceration. The children had lived out-of-state for several years with an aunt and uncle who had been appointed as their legal guardians. When our client called our office, he had just learned that the children's safety was in jeopardy – the uncle had recently been arrested, convicted and incarcerated for molesting the young girl. The children had just traveled to California to visit their grandparents and when the grandparents heard about the events that had transpired, they decided that the children should stay in California and not return to live with their aunt.

Legal Assistance for Seniors filed the initial petition for guardianship and assisted with every step of the case, including locating both parents and both of the former guardians and having them personally served with the required documents. Due to the complicated nature of the case, staff spent over 70 hours on this case. The court granted our client's petition for permanent guardianship, and the children are now safe in their grandparents' care.

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. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. 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 is a participating agency in the Northern Alameda County Kinship Collaboration and provides legal services to relative caregivers of minors. LAS has also been awarded contracts by the State Bar of California and the cities of Fremont, Hayward, Oakland, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

PSA: 10

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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 Third 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, Barbara Lee (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), Seven Trees Community Center (San Jose), Eastside Senior Center (San Jose), Mayfair Community Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community 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 Third Quarter of 2010-11, SALA attorneys also participated in the January, February, and March meetings and/or activities of the Elder Abuse Task Force of Santa Clara County and the February meeting of the Public Benefits Task Force. During the Quarter the SALA Directing Attorney and the SALA Supervising Attorney also met with the judges and staff of the Probate Court, the Family Court, and the court that handles Unlawful Detainer (eviction) actions; attorneys from Bay Area Legal Aid, Pro Bono Project, Asian Law Alliance, and the Law Foundation also participated in those meetings.

PSA: 11

Provider: Council for the Spanish Speaking

Counties: San Joaquin

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 12

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Quarter: 3

Provider: Catholic Charities

**Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu
mes**

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: San Cruz and San Benito

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

Provider: Central California Legal Services

Counties: Fresno-Madera

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 15

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Quarter: 3

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

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

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

1. We held our second annual volunteer attorney meeting which generated excitement and good ideas for making the volunteers' jobs easier.
2. After our advocate learned there were funds available for elder abuse prevention, we began planning a community-wide conference with a focus on cultural diversity and appreciation of elders and wisdom.
3. Though we have fewer training opportunities in this rural area (and in these budget times), our advocate and staff member were able to attend an all-day training in nearby Fresno on Capacity issues.

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration with United Way of Tulare County, HICAP, Sequoia Community Mediation Center, Self-Help Resource Center, Information & Assistance staff and others continues as previously reported..

PSA: 16

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Fiscal Year: 2010-2011

Quarter: 3

Provider: California Indian Legal Services

Counties: Inyo and Mono

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

As directed by the local Inyo Mono Area Agency on Aging our senior legal services places a priority on providing Durable Power of Attorney forms, both/either financial and health care versions. Every month we are providing helpful self education materials and samples of these important documents to our senior clients, here are a few examples of meeting this need:

Case #1: A 70 year old client came into our office with her two daughters stating she was informed that she needs a conservatorship by a social service agency. After very brief introductions the daughters were asked to step outside the office while the client was interviewed. It was determined that the client was alert and competent. We discussed many related topics but focused on powers of attorney forms for both financial and health care, which may avoid the need for a future court conservatorship. Documents were drafted, reviewed, executed and notarized.

Case #2: A 78 year old widowed client with early stages of dementia indicated that he wanted to get all his affairs in order, including power of attorney forms. Due to the client's deteriorating capacity and to lessen any degree of confusion, we made a home visit to meet with the client and his family to discuss the client's legal needs. His daughter was present and explained that she had been wanting to help her father find out about his insurance coverage for nursing home care in the future, and was informed that she couldn't request such information without a power of attorney for her father. The client also indicated a desire for his family to be able to do anything needed, both financially and medically and wanted to ensure that his family would have this access. We met with the client individually and had a private discussion to confirm his competency to sign powers of attorney. The client demonstrated that he is very competent at this time. A second home visit was made to the client where the documents were executed and notarized.

Case #3: An elderly couple, both in their 70's, contacted us for assistance. They previously had individual powers of attorney's forms drafted and executed by our program five years ago. The couple has since legally married. We revised both the financial and health care documents for both of them including a name change and updated address information, executed and notarized all documents.

Optional Information on
Collaboration with Other
Advocacy Groups

IMSLP retains an active role on the local area agency on aging Advisory Council to continue to advocate for continued services in the local senior community and county services by attending bi-monthly meetings or as needed to continue the support of these vital senior services. During this quarter, IMSLP participated in the ongoing goals and plans for the Inyo and Mono county senior services as a supportive service provider that provides up-to-date information on what is currently happening in the senior community from a legal services perspective. We continue to offer support and assistance to the Area Agency on Aging through this very important council membership.

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Provider: Central Coast Commission For Senior Citizens **Counties: Santa Barbara and San Luis Obispo**

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

Optional Information on Collaboration with Other Advocacy Groups

PSA: 18

Provider: Grey Law of Ventura County **Counties: Ventura**

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

Optional Information on Collaboration with Other Advocacy Groups

PSA: 19

Provider: Bet Tzedek Legal Services **Counties: Los Angeles County**

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

Optional Information on Collaboration with Other Advocacy Groups

PSA: 20

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Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

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

Client is a 69 year old with Parkinson's. He was about to undergo surgery that he needed to aid the trembling in his hands and jaw. Client is illiterate and was told by his previous caretaker, who was also his daughter, to sign certain documents. Client did not realize that he had executed an Advanced Health Care Directive and Power of Attorney and now wanted to revoke these documents and execute new ones to ensure that his old caretaker/daughter would not be able to interfere with his wishes. ICLS was able to draft the documents for the client and had them executed in a few days, just before his surgery was to occur. ICLS was able to provide the Client with peace of mind and calm his nerves before his surgery occurred.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 21

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

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

Represented Client in a Breach of Contract matter in which the client paid the defendant money to fix the client's backyard. One defendant failed to perform the work he was paid to do and the other defendant did the work but the work done was not in satisfactory condition. ICLS obtained a settlement for the client of \$5,000 against one defendant and a judgment of \$70,000 against the other defendant.

Represented a Client in a habitability/breach of contract matter. The landlord began repairs over client's unit which caused the client's home to be uninhabitable at time. The landlord refused to cover relocation costs for the client. The landlord finally made a settlement offer and the client received \$7,500 for the client's claims.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 22

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Provider: Legal Aid Society of Orange County

Counties: Orange County

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

We represented a client at a Social Security hearing before an Administrative Law Judge.

The client had received a notice that she had been overpaid over \$84K. She had filed a Waiver Request that had been denied. Client then requested a hearing and contacted our office. In her decision, the ALJ found that recovery of the overpayment would be against equity and good conscience, and waived repayment of the overpayment.

Optional Information on
Collaboration with Other
Advocacy Groups

We have continued to expand our work with other organizations in an effort to better utilize and expand the reach of our services to survivors of elder abuse. Building on our years of involvement with the Financial Abuse Specialist Team (F.A.S.T.), we have recently started participating in the Elder Abuse Forensic Center meetings.

We continue our participation as a member of the Model Approaches Advisory Committee. Model Approaches is a federal grant made to the California Department of Aging, Senior Legal Hotline and Legal Assistance Association of California. The grant is a 3 year grant intended to study and increase the effectiveness of the delivery of legal services to seniors in California.

PSA: 23

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Provider: Elder Law & Advocacy

Counties: San Diego

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

An 85 year old senior had financial problems as a result of medical expenses stemming from her husband's serious health problems. Prior to husband's passing away, client refinanced her vehicle with a hard money lender.

The senior received a three-year loan of equal payments principal and interest. During this three-year period, it was not uncommon for the senior to be late on payments and/or submit NSF checks. As a result of her somewhat unreliable payment history on this loan, late fees and additional interest accrued. This spotty payment history ultimately created animosity between the lender and the senior. Our attorney met with the senior when she believed she had finally made all 36 payments. Despite this belief, she told our attorney that the lender advised her that she had only sent in 33 "good" payments. She vehemently disagreed with the lender. She could not discuss this with the lender, amicably, and work out a settlement because of her payment history. Our attorney contacted the lender and received the senior's payment history.

Our attorney examined these documents and determined that the lender was correct and that the senior was short three payments. After careful explanation, our attorney informed the senior that she was, in fact, short three payments. Our attorney contacted the lender once again and discussed this amount owing - principal, interest and late fees - and how it could be resolved. Our attorney informed the lender that the senior has limited income consisting of Social Security, only.

After the attorney had a discussion with the lender, they offered to accept a lump-sum of three payments of principal and interest. The lender was able to waive all late fees and other accrued interest. Our attorney countered with the fact that client cannot afford to make the full three month lump-sum payment. The attorney asked if the lender would accept an initial two-month payment followed by the balance in one month.

The lender agreed to the attorney's counter-offer and the senior was able to make the final payments under that plan. The lender promptly furnished the senior with clear title to her vehicle. The senior was very pleased.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 24

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

Fiscal Year: 2010-2011

Quarter: 3

Provider: Elder Law & Advocacy

Counties: Imperial County

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

A 70 year senior loaned a person that served as an unofficial handyman in her apartment complex the amount of \$300.00, to be repaid over the next 30 days in two installments of \$150.00 each. The loan details were transcribed on a handwritten note (written in Spanish), and the note was signed and dated by both the senior and the unofficial handyman. On each of the due dates for the \$150.00 payments, the unofficial handyman informed client that he fully intended to repay her but was unable to do so at the time. The senior generously allowed him more time to repay her. The senior kept excellent written records of her phone and in-person contacts with this person, documenting the person's shift from intending to pay the senior back when financially possible to attempting to avoid the senior to bluntly stating that he would not be repaying the loan.

Our attorney met the senior who is living on a small fixed income. The senior lives in a rural area and speaks very little English and our program assistant was able to translate for the senior. Our attorney informed the senior of her options, including the option of filing a law suit in small claims court. The senior reluctantly chose to file a small claims action against the unofficial handyman. The senior now holds a default judgment for \$300 plus interest, which continues to accrue, as the unofficial handyman never responded nor showed up for his hearing. The senior was very appreciative of the legal advice and information that our attorney was able to provide.

Optional Information on
Collaboration with Other
Advocacy Groups

Elder Law & Advocacy participated in a senior event on 1/12/2011 which took place at the National Guard Armory in El Centro. Brochures were available to attendees to this event that provided them with information regarding Elder Law & Advocacy's senior legal services.

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: 3

Provider: Senior Law Project, Inc.

Counties: Lake and Mendocino Counties

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

Senior Law Project successfully challenged an SSI overpayment charged to an elderly and disabled couple. The overpayment was caused by the Social Security Administration's error in counting IHSS provider wages.

Optional Information on
Collaboration with Other
Advocacy Groups

Senior Law Project continues to collaborate with IHSS Advisory Committees in both Lake and Mendocino Counties. The Senior Law Project Attorney drafted an open letter to the Lake & Mendocino County Boards of Supervisors regarding the Governor's IHSS Budget Proposal. That letter was sent by the IHSS Advisory Committees in both 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.
Senior Law Project is collaborating with Legal Services of Northern California regarding implementation of Ukiah's new Mobilehome Rent Stabilization Ordinance.

PSA: 27

Provider: COUNCIL ON AGING

Counties: Sonoma

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 28

Provider: Legal Services of Northern California

Counties: Solano County

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 with community groups including : FAST, Solano Senior Coalition, and Vallejo Senior Roundtable.

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

Fiscal Year: 2010-2011

Quarter: 3

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

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: 3

Provider: California Rural Legal Assistance, Inc.

Counties: Stanislaus

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

1/27/2011 SEAPA Core
CRLA's Rick Cardozo attended this meeting. The Stanislaus Elder Abuse Prevention Alliance is comprised of staff and representatives from the Long Term Care Ombudsman Program, the AAA, law enforcement, the county prosecutor's office, and local clergy members. The Senior Law Project staff attorney attends these meetings to maintain his contacts with these various organizations, thereby supporting the effort to prevent elder abuse in Stanislaus County. The Core meetings involve community members on the broad county level. Each month the SEAPA staff conducts elder abuse prevention forum meetings in the various towns throughout the county. Each community sponsors an annual fair for their particular area to convey information about resources to assist seniors and caregivers about the reality of elder abuse and how to prevent it.

2/2/2011 STOAAC approx 30 attendees Modesto
Rick Cardozo of CRLA attended this meeting. The Services to Older Adults Advisory Commission is a networking meeting that involves staff from the AAA and the programs associated with the AAA. Also in attendance are staff members from assisted living and skilled nursing facilities, representatives from the local hospice organizations, and staff members from organizations that market to and serve senior citizens and their caregivers. Each organization is given the opportunity to state their purpose and current status, offering the various attendees information that will aid them in their particular mission.

2/24/2011 SEAPA Core approx 20 attendees Modesto
Rick Cardozo from CRLA attended this meeting. Also, see above description.

3/2/2011 STOAAC approx 40 attendees
Rick Cardozo, CRLA representative, attended this meeting. Also, see above description.

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

Fiscal Year: 2010-2011

Quarter: 3

Provider: Central California Legal Services

Counties: Merced

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

1. A Spanish speaking only client who disputes the balance on his dental account was charged interest, late fees and penalties in the process of trying to dispute the balance. Client believes the balance is too high for the dental services he actually received, which was less than the estimated services to be performed. Attorney spoke with attorney for dental office and was able to negotiate the elimination of interest, late fees and penalties. Attorneys are still working together to determine outstanding balance and a new monthly payment plan that client can actually afford.

2. Defendant client was sued by a debt collector in Stockton (San Joaquin County), which was improper since the client resides in Merced County. Client has not resided in San Joaquin County since the summer of 2010. Client is also disabled, greatest economic need and the full time caregiver of her adult son who has developmental disabilities. If the case remained in the wrong county, client would have no opportunity to dispute the case.

Attorney filed a Motion to Change Venue, Declaration in Support of Motion, and Memorandum of Points and Authorities, on behalf of the client who is in pro per. Opposing counsel for the debt collection agency did not file any responsive papers. A tentative ruling was issued one day prior to the hearing that preliminarily granted the motion. The matter was heard on March 3, 2011, with plaintiff appearing by telephone. The judge granted the motion to transfer venue to Merced County. Attorney drafted and filed a Findings and Order After Hearing to memorialize the judge's ruling, which was filed on March 21, 2011. Case was successfully transferred on April 5, 2011.

Optional Information on
Collaboration with Other
Advocacy Groups

1. In February 2011, Attorney spent approximately 0.9 hours working with other AAA advocacy groups to serve clients who needed various services.

2. Attorney drafted email to Connie Hodges at Merced Sun Star to publish an updated notice for senior legal services. The notice reads as follows:

Free Legal Services for Seniors

Central California Legal Services, Inc. (CCLS) in partnership with the County of Merced provides free legal services to seniors. To receive these services, client must reside in Merced County, be 60+ years old and be a U.S. Citizen or lawful permanent resident. Areas of assistance include: wills, powers of attorney, health care directives, housing matters, consumer and debt collection matters, notary services and elder abuse. Call the Merced County Area Agency on Aging at (209) 385-7550 for more information, or to make an appointment.

PSA: 32

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

Fiscal Year: 2010-2011

Quarter: 3

Provider: Legal Services for Seniors

Counties: Monterey

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

On three separate occasions & with three separate clients, Legal Services for Seniors represented clients at administrative law judge hearings and was successful in either obtaining new benefits or restoring benefits which had been improperly withheld. In one instance, a client had attempted to qualify for SSDI benefits for the past three years and had been rejected twice in the past. Our client, who lived in an extremely remote area of the county, was not yet 62 years old and was living on nothing but the wages she earned house sitting. Even the legal advocate assigned to her case held little hope for success. However, with our research and our advocate's representation at the administrative law hearing, our client received a favorable decision and she was able to receive assistance and, subsequently, long-delayed medical treatment.

Optional Information on
Collaboration with Other
Advocacy Groups

OPTIONAL INFORMATION ON COLLABORATION WITH OTHER ADVOCACY GROUPS
1. In February I met with the Senior Legal Hotline representative, David Mandel, regarding ways our two programs may be able to compliment each other.
2. Each month, representatives from Legal Services for Seniors, Area Agency on Aging, HICAP, Alzheimer's Association, Salinas Valley Meals on Wheels and the Monterey Peninsula Meals on Wheels meet to coordinate our programs and assist each of the agencies in community outreach opportunities, advertising to the public and strategy. We have asked, at various times, for representatives from the AAA and other agencies to attend these sessions to inform us on ways we may better serve the senior community.

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