

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

Fiscal Year: 2011-2012

Quarter: 4

PSA: 1

Provider: Legal Services of Northern CA

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, Lassen, Modoc, Siskiyou, Trinity

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)
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Fiscal Year: 2011-2012

Quarter: 4

Provider: Legal Services of Northern California

Counties: Placer, Nevada, Sierra

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

June 2012
 LSNC assisted an elderly SSDI recipient with a 10% reduction in her SSDI benefits due to an overpayment of which she was unaware. In the course of the investigation of the client's situation, LSNC discovered that a former spouse may have kept funds that were improperly deposited into an account our client no longer controlled. The overpayment was waived in full as our client was not at fault in causing the overpayment and as it would a hardship for her to repay the outstanding funds.

Optional Information on
 Collaboration with Other
 Advocacy Groups

April 2012
 LSNC assisted a widowed senior diagnosed with a cognitive disability but who still maintained the capacity to understand and articulate her wishes with regard to her housing, health care and the disposition of her home and personal property. Unfortunately this senior was estranged from her only child due to the adult child's mental health issues. LSNC worked with a charitable organization to facilitate communication between the client and her daughter. LSNC worked with a housing placement professional who provided assistance searching for affordable and appropriate assisted housing and an application for Veterans' benefits.

May 2012
 LSNC provided assistance with revoking a durable power of attorney for asset management. The client discovered that her agent had committed multiple unauthorized uses of her credit. The unauthorized use of the senior's credit led to a lien on the senior's home. LSNC recommended that the senior obtain a private attorney to review and amend her remaining estate planning documents to remove the agent's authority under her Trust and Will. A criminal investigation continues with local law enforcement.

Monthly Service Units Report

Month:

Title of Service Unit Unit Number of Units
 a. Legal Assistance 1 hour 759
 b. Legal Representation 1 hour 129
 c. Legal Education & Advocacy 1 hour 38
 d. Total Legal Services (a+b+c) 1 hour 926

Legal Services by County

Placer Nevada Sierra Total

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Assistance	52720824759
Representation	118110129
Community Education/Advocacy	334138
Totals	67822325926

Provider: Yuba Sutter Legal Center

Counties: Sutter and Yuba

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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Provider: Sacramento Senior Legal Services

Counties: Sacramento

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

(1) A low income, 87 year old senior contacted SLH for legal advice pertaining to how to cancel an expensive home repair agreement. After the senior had allowed a salesperson into her home, the salesperson pushed the senior into signing a contract to repair the senior's personal item. The senior could not afford the price but the salesperson pressured the senior to sign the contract. After the salesperson left the senior's home, the senior cancelled the contract, both verbally and in writing. The salesperson refused to honor the senior's cancellation and held onto the senior's personal item. SLH represented the client before the salesperson, advocated for the client's rights and obtained a successful outcome which included the return of the personal item.

(2) A disabled, low income 73 year old contacted SLH for legal advice pertaining to a potential eviction. The senior was unable to afford the rent because her low income housing subsidy had been terminated. The termination was caused by a combination of the senior's disability and the landlord's refusal to make a repair to the unit (a repair that the landlord was legally required to make). SLH represented the senior before both the landlord and the housing authority. SLH worked with the senior's landlord, doctors and the housing authority to successfully avoid an eviction and obtain a reinstatement of the senior's low income subsidy allowing the senior to be able to maintain her housing and avoid homelessness.

Optional Information on
Collaboration with Other
Advocacy Groups

SLH worked as a partner with the California Department of Aging and the Legal Aid Association of California on a federal Model Approaches grant with the goal of meeting the legal needs of more seniors in Californians, targeting the most needy among the state's huge diverse population and reducing the serious disparities in the existing availability of legal help. As a leader to other California senior legal service providers, SLH shared with its partners and other California senior legal aid providers SLH's work in serving the most vulnerable older clients in our legal practice areas. SLH played a key role in organizing a statewide June 6 conference to convene senior legal service providers, California Department of Aging, and Area Agencies on Aging to discuss legal issues facing our senior population, share resources and discuss how to help more seniors throughout California. SLH is in charge of organizing a resource sharing mechanism so that senior legal advocates can share resources allowing more time to be devoted to direct client services and representation.

On June 28, SLH presented a national webinar for senior legal services advocates and National Adult Protective Services Association members, which includes APS, law enforcement, legal advocates and social workers, in several areas of law including powers of attorneys, advanced health care directives, conservatorships (often called guardianships outside of California), alternatives to conservatorships, and capacity issues. During the webinar, which was facilitated by the National Adult Protective Services Association, SLH advocates explained to the national audience the limits of the Legal Services and APS relationship, where the missions converge and where they part.

SLH continues to hold office hours at two senior centers each month (Rancho Cordova Senior Center and the Hart Center) to allow seniors to meet with SLH advocates in person.

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Legal services hours: 1031.7; of this, 152.6 representation, 806.1 assistance

Provider: Legal Services of Northern California

Counties: Yolo

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC staff held office hours at the following locations: Rural Innovations in Social Economics (RISE), a nonprofit agency serving low income persons in Esparto, on the 1st Thursday of the month; the West Sacramento Senior Center on the 2nd Thursday of the month and the former West Sacramento Senior Center on the 4th Thursday of the month; and the Yolo Family Resource Center in Knights Landing on the 3rd Thursday of the month. In addition, LSNC participates in monthly meetings of the Yolo County Health Aging Collaboration with other Yolo County senior providers, including the Food Bank, Adult Day Health Center, Supervisor Provenza's staff, Yolo Hospice, Department of Employment and Social Services, Veteran's Services, and representatives from the three Senior Centers. Legal Representation: 15.9 Legal Advice/Assistance: 94.2 Community Education: 11.3 Special Outreach: 5.0 Total Hours: 126.40

PSA: 5

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Provider: Legal Aid of the North Bay

Counties: Marin

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

1. Our client, grandmother was legal guardian for her grandson who has several mental disabilities. Both his parents were out of state and not able to care for their son who was turning 18. Pro Bono attorney, Faye Taylor, filed petition for the client and partner and obtained order appointing them as Conservators of the Person of grandson.

2. 79-year old client on a fixed income came to Legal Aid seeking a conservatorship over his 43-year-old daughter, who was unable to move or speak following a massive stroke. Client wanted to be able to assist his daughter with issues such as health insurance and child custody, and was unable to do so in the absence of a conservatorship. Staff Attorneys from Legal Aid consulted with the daughter's health care providers, with the client's family, and with the probate court. We then prepared the necessary court filings, and successfully convinced the court to allow our client and his sons to serve as co-conservators. Moreover, due to client's low income, Legal Aid requested and received a waiver of all fees, bonds, and accountings.

3. A 66-year-old veteran with a mental health diagnosis came to LAM requesting assistance with his Section 8 voucher. Client had gone through an eviction the previous year and had not sought legal advice at the time. Due to issues stemming from the eviction, MHA threatened to terminate client's section 8 voucher based on allegations of nonpayment and alleged behavioral issues. LAM represented client at the administrative hearing and prevailed. The client, who has been homeless and living outdoors for several months, was permitted to keep his voucher. He is now working with a case manager at Ritter Center to find a new apartment.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 6

California Legal Services (Title III B)
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Fiscal Year: 2011-2012

Quarter: 4

Provider: Legal Assistance to the Elderly

Counties: San Francisco

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

Client is a 65 year old man living on a small VA pension in a single room occupancy hotel in the Tenderloin. Management sought to evict him alleging that he failed to maintain his room in a clean and sanitary manner and that his behavior disturbed neighbors and interfered with building staff. His room was cleaned up with the assistance of his case manager and IHSS worker and our Staff Attorney was able to negotiate a settlement agreement with his landlord. The settlement permitted him to stay provided that his unit remained clean and his disruptive behavior did not recur.

Optional Information on
Collaboration with Other
Advocacy Groups

We continue to work with Asian Law Caucus, La Raza Centro Legal and Asian Pacific Islander Legal Outreach to produce a publication called the "Senior Rights Bulletin". The Bulletin is published twice a year and 10,000 copies of each edition are circulated to individuals and service providers. Articles are translated into Spanish, Chinese and Vietnamese. The most recent edition, Spring 2012, includes an article regarding debt collectors, an article regarding estate planning and an article regarding a scam which uses victim's credit to purchase cell phones which are then exported.

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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

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

April Client: A Spanish speaking disabled senior is currently receiving benefits for \$694 a month from the Social Security Disability Income (SSDI) program. He was also receiving \$506 per month of Workers' Compensation for Disability, but the benefits ended because his full compensation amount had been completely paid to him. However, the client did not understand why his workers' compensation benefits had ended, and he was concerned because he cannot afford to support his household and pay for his rent and food with just the SSDI benefits. We filled and submitted an SSI application on his behalf. Finally, the application was approved for the SSA and will soon start receiving SSI benefits in addition to his SSDI benefits. He will be now able to provide for his expenses without fearing of being evicted.

May Client: A senior resident was the victim of identity theft more than 10 years ago by a woman who presently lives in Nevada. Although the client thought she had dealt with all the legal and financial issues caused by the identity theft, on June 17, 2012, she received a complaint filed by HSBC Bank of Nevada for the amount of \$3,079.61 plus interests on that sum at the rate of 10% per annum from February 28, 2009. We assisted the client by filing and serving an answer explaining the case in addition to a request for a Jury Trial of the case.

June Client: A Spanish speaking senior resident lent her life savings of \$25,000 to the man who was at that time her son-in-law, receiving in exchange a signed promissory note that he would repay the loan plus \$5,000 in interest. However, the borrower fell victim of the financial crisis, and after divorcing the daughter of the client, moved out of San Francisco refusing to repay the loan. Afterwards, on 7/2/12, the client received a notice of Chapter 7 Bankruptcy Case, Ref: Meeting of Creditors and Deadlines explain that the debt will be discharged in favor of the borrower who filed for bankruptcy. We accompanied the client to the Bankruptcy Clerk's Office in San Francisco to serve as her translator as she inquired about the required documents needed for her to file a Complaint and Motion to Object to Debtor's Discharge of Certain Debts under the §523(a)(2) and (6). With our help the client filled out the forms from the Bankruptcy Clerk's Office and was referred to the VLSP, San Francisco Bar Association for further assistance.

Optional Information on
Collaboration with Other
Advocacy Groups

This quarter was very dynamic in terms of the variety of cases presented to include cases on bankruptcy and consumer issues.

We participated at the Latino Partnership's monthly meetings at the 30th Street Senior Center where we share point of views and talk about common issues. Likewise, we continue to collaborate with the Senior Rights Bulletin by providing pertinent articles for seniors and providing proofreading and editing for the Spanish version of it.

Finally, we still collaborate actively with the Legal Aid Association of California, Senior Law Chapter in both the Steering Committee and the Languages Access Committee. We participated in the Annual Conference held in San Francisco on June 6, 2012.

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Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

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

Leonor is a 63-year old woman from Mexico who was trafficked by her younger sister Alicia in San Mateo and Alameda County. She currently resides in San Francisco County. Leonor felt obligated to come to the U.S. because she owed Alicia more than \$5,000 for money that Alicia had sent Leonor for medical bills and other expenses. Alicia hired a smuggler to bring Leonor to the United States. During the first six years that Leonor spent in the U.S. working for Alicia, she was not paid a single time. In the fourteen years that Leonor worked for Alicia, she was given small "gifts" of cash only a handful of times. By denying Leonor payment, Alicia was able to coerce her into staying in deplorable working conditions by cultivating a very real fear that if Leonor were to leave her situation, she would have no place to go and would starve on the streets. Leonor was forced to work through several painful work-related injuries, such as fracturing her fingers on at least two occasions. Alicia ultimately forced Leonor to be homeless, and Leonor contacted the Mexican consulate, who in turn contacted SAGE, who then in turn referred the case to us. Leonor received continued presence from Homeland Security Investigations from the Dept. of Homeland Security, but no criminal case has been initiated.

API Legal Outreach worked with Asian Women's Shelter. The client's T-visa was approved, and received the approval notice on 4/23/12. We will be assisting her with her adjustment under the OOA grant.

Optional Information on
Collaboration with Other
Advocacy Groups

With the recession, many organizations have learned to come together even more to help each other struggle through the hardship. Non-profits including API Legal Outreach has been the master of collaboration and it not only require us to learn to trust each other, but to continually work in the interest of our clients.

This year, we have worked with another community agency to build capacity in representing clients in housing eviction cases and to help many of those with limited language ability navigate through the housing application for affordable housing. Many of them are seniors, poor and disabled. We hope to continue to build on this relationship.

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Provider: Asian Law Caucus

Counties: San Francisco

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

A Chinese woman on SSI was faced with having to move out of a Fillmore senior housing complex she's been living in since 2010. Property management attempted to mediate a dispute between her and a neighbor, who complained of excessive noise. Our client has stage 2 breast cancer and diabetes. Symptoms from the treatment include insomnia, diarrhea, fatigue, pain. The neighbor's 14-page complaint – which cited late night noise and excessive use of the toilet – read more like a diatribe. Property management concluded that a lottery would be taken to determine who is to be relocated to a comparable unit on site. The lottery resulted in our client being required to transfer. Ultimately, she was also given a deadline to move to a recently-vacated unit or pay market rate for her current home. The market rate was substantially higher than the SSI she receives. Moreover, the unit offered to her was different in that it did not include a balcony. She felt that the ease of egress, better ventilation, and sunlight was important to help her deal with the pain.

We represented her only in dealing with property management to steer it on a more equitable course of action. Federal law allows the landlord to do what it was doing, but we pointed to fair housing issues and submitted a reasonable accommodation request to ensure she would only move to a unit that also had a balcony. We were able to have her physician draft a letter supporting her request. Property management accepted her request, and she is no longer under threat of a rent increase beyond her ability to pay.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 7

Provider: Contra Costa Senior Legal Services

Counties: Contra Costa

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 8

California Legal Services (Title III B)
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Quarter: 4

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

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

Mrs. L, a 76 year-old widow, had allowed her son John to move in about a year ago after he was put out of a shelter. Unfortunately, John abused alcohol and used cocaine regularly. Mrs. L had tolerated his verbal abuse for years, but she became frightened for her safety when he started having violent outbursts and throwing things in his room. There was broken glass all over his room. Her daughter called the police in May during the most recent rampage. The police took him away and found knives, hacksaws, and other weapons in his room, including a bag that the police described as a "body bag." We represented Mrs. L to obtain a restraining order preventing John from returning to her home. The judge granted a three year restraining order.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 9

California Legal Services (Title III B)
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Provider: Legal Assistance for Seniors

Counties: Alameda

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

Legal Assistance for Seniors represented Mr. Smith in obtaining an Elder Abuse Kick-Out Order against his son. Son was going through a divorce so Mr. Smith allowed his son to temporarily move in with him. Quickly after moving in, son became verbally abusive and began threatening Mr. Smith. The verbal assaults became daily so Mr. Smith would purposely leave his apartment during the day. He would only come home late at night to sleep (sometimes even sleeping in a motel room to avoid a confrontation). Son would not allow him into the kitchen or living area before 10:00am every morning. If Mr. Smith entered the kitchen or living area, the verbal assaults would begin.

LAS obtained the temporary restraining order and the Alameda County Sheriff's Office kicked Son out of the home. Before the hearing date son filed an ex-parte application to reverse the kick-out order, which was denied. Son appeared in court on the hearing date and contested our request. During the hearing, son attacked Mr. Smith's mental capacity. With LAS's representation at the hearing, this tactic was not successful. LAS called Mr. Smith's Alameda County Adult Protective Service social worker to the stand to show that Mr. Smith had been consistent with his story and that there were no issues of self-neglect. Our permanent restraining order was granted for 3 years.

This situation was very stressful for Mr. Smith and caused him nights of sleeplessness. After the hearing, Mr. Smith was extremely relieved. He was very thankful for the assistance he received from LAS.

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, 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

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration With Senior Centers and Other Sites to Deliver Services
For the 4th Quarter of 2011-12, 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), Seven Trees (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.

Participation in Collaborative Activities with Other Attorneys
SALA attorneys participated in meetings of the Fair Housing Consortium in May and June 2012 and the Elder Abuse Task Force in May 2012. SALA's Supervising Attorney also attended a meeting of Statewide Legal Services Providers for Seniors in San Francisco in June 2012.

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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Provider: Catholic Charities

Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu

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

None

Optional Information on
 Collaboration with Other
 Advocacy Groups

None

PSA: 13

Provider: Senior Citizens Legal Services

Counties: Santa Cruz & San Benito

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

A couple of highlights from this past fiscal year include:
 SCLS continues to take a pro-active approach to prevent elder abuse through its innovative Fiduciary Services program. SCLS assists seniors in avoiding financial abuse before it happens by providing professional fiduciary protection to vulnerable clients.
 SCLS also continued its ongoing representation of the residents of Alimur Mobile home Park. These residents are threatened with the involuntary conversion of their park into a condominium form of ownership. Although that may sound benign, the sole purpose of an involuntary conversion is to effect a dramatic transfer of the residents' equity in their homes to the park owner. SCLS was been successful at the administrative and local superior court levels. Recently, the Sixth District Court of Appeal ruled in our favor in a case of first impression on the legality of this procedure. This decision, unless overturned by the California Supreme Court, will provide protection for thousands of seniors living in mobile home parks all over the state as they try to protect their most significant asset, their homes. It will preserve several million dollars worth of equity in the mobile homes owned by fixed income seniors. It is uncertain at this time whether the Supreme Court will agree to hear this case.

Optional Information on
 Collaboration with Other
 Advocacy Groups

SCLS continues to cooperate with California Rural Legal Assistance attorneys in landlord/tenant cases where there are eligible clients for both programs.
 The SCLS Directing Attorney works closely with the AAA to ensure the continued provision of senior services in Santa Cruz and San Benito Counties.
 Finally, the SCLS Directing Attorney continues to serve on the Executive Board of the Human Care Alliance (HCA) as the vice-president. HCA is a consortium of social service agencies that unite to advocate with one voice on a variety of issues before local government entities. During this past year, HCA made a concerted effort to persuade local governments to continue funding nonprofits that assist seniors such as nutrition programs, ombudsman assistance, legal assistance, etc.

PSA: 14

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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

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

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

None this quarter.

Optional Information on
Collaboration with Other
Advocacy Groups

Building on the collaboration begun last quarter with local nonprofit, CSET, and with the network of rural-based and school-connected Family Resource Centers, we distributed our new flier in Spanish and English to be redistributed to several rural locations. In addition, our advocate was able to use space at (and staff for interpreting from) one of the Family Resource Centers (in Earlimart).

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

Provider: Central California Legal Services, Inc.

Counties: Kings

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 16

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Provider: California Indian Legal Services

Counties: Inyo & Mono

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

4th Quarter Case Summaries:

Case #1: We assisted a tribal elder who had become a victim of "debt solution" scam by advocating to the private company and her credit card provider. We also contacted and complained to the Federal Trade Commission and the California Attorney General's office. Advocates reviewed the consumer materials and determined that the client had been wrongly charged an advance fee of \$895 before any services had been rendered which violates the federal Telemarketer's Rule. Upon sending a demand letter to the company and after 5 months the advocacy efforts resulted in the client receiving a full refund of the advance fee.

Case #2: An 82 year old client living in a remote mobile home park in Tecopa, CA contacted us regarding a letter from the manager of this mobile home park demanding that the client pay an increased space rental amount retroactively to 2 months prior to the notification and instructed the client to stop driving certain vehicles in the mobile park. The client has been a resident of this mobile home park for 22 years and for most of those years had served as the maintenance man for the mobile park where he used a golf cart to travel in the mobile park. Advocates reviewed the notice and instructed the client that under the Mobile Home Residency Law Act that the landlord must provide a 90-day advance written notice of a rental increase and it cannot be retroactive; also the landlord must provide a 6 month advance notice to any changes to the mobile Park rules including a rule requiring certain vehicles are no longer allowed in the mobile park.

Case #3: We provided assistance to tribal elder who had received a court judgment regarding a past due credit card with a balance of \$6,000. Advocates provided counsel and advice to the client explaining that the client is exempt from judgment status. The client's only income is through Social Security and the client was fearful that she was going to lose this income because she does not have any assets. We also provided a letter for the client to send to the Creditor to remind them of her current financial situation.

Case #4: A tribal elder requested assistance regarding potential loss of Medi-Cal and SSI benefits as a result of income received from the client's tribe. An appeal and waiver was filed in the SSI matter and a favorable decision was made based primarily on the fact that the elder had reported all information as required. With the SSI benefits protected, the advocates explained to the client that the Medi-Cal benefits would remain intact.

Optional Information on
Collaboration with Other
Advocacy Groups

The Inyo Mono Senior Legal Program coordinates services with the Inyo and Mono Department of Health Care Services, Inyo Mono Area Agency Advisory Council membership, Inyo and Mono Senior Service Centers, California Advocates for Nursing Home Reform, National Senior Citizens law Center, Western Center on Law and Poverty, Ombudsman Program for Inyo and Mono counties, and HICAP.

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PSA: 17

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, Inc. **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**

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)

Senior needed to evict her freeloader friend. He had been living with her since August 2011. Advocate advised client that a simple 30-day notice to quit that needs to be served on tenant. Client did establish landlord/tenant relationship with him by verbally agreeing to allow him to stay for \$400 per month. Tenant stopped paying. Client will immediately serve tenant with a 30-day notice to quit and eviction will come later. There are really no defenses to a 30-day notice to quit. The notice may move tenant out of the house before eviction.

A 70-year old senior requested legal assistance to have her Will prepared. The client had recently become aware that her spouse of over 30 years had been having an affair for over 15 years and had fathered a child. The client was devastated and felt betrayed by her spouse. The client did not want the other woman moving into the home if she predeceased her spouse. The client never had any children and knew that her interest in the home would transfer to her spouse upon her death. Because the client had always contributed much more to the household than her spouse, she did not want them to profit from her hard work. Due to his infidelity, the spouse transferred his interest in the home to the client via a notarized Grant Deed and now the client wants to will the home to her sister. Advocate advised the client that a Grant Deed would not terminate her spouse's right to interest in the home and that upon her death he would be able to contest her Will. Advocate advised client that she should have spouse sign an Interspousal Grant Deed, which is a Grant Deed specifically for this type of transaction and advocate agreed to prepare the Interspousal Grant Deed as well as her Will. The client was very grateful for the advice and assistance ICLS provided her with and has already recorded the Interspousal Grant Deed with the Recorder's Office and will be executing her Will next month. (12E-7003459 & 12E-7004107)

In May an 88-year old Hispanic widow requested the assistance of ICLS regarding a bill for \$378 she had received from the apartment complex management where she had previously lived. The client is severely disabled and her only source of income is her deceased spouse's Social Security and SSI. She speaks only Spanish and is not able to read or write. Client was hoping to receive her deposit back of \$300 to pay the extra 16 days she needed to stay, but instead they kept her deposit and sent her a bill for a prorated amount on the carpet and vinyl, the cleaning of the apartment and the additional rent. The client is very stressed out and upset. She has been receiving collection calls and feels it is so unfair. Her total monthly income is \$854 and there is no way that she can afford to pay this bill. Advocate advised the client not to worry about this anymore because her income was protected and that she would send a letter on the client's behalf requesting that they cease and desist any further communications about this bill with her. Advocate further advised the client to screen her calls and to try not to talk to them because it would only upset her. Advocate also advised client that if she happened to get served with a lawsuit that she should immediately call for further assistance. The client was so grateful for ICLS that she gave the advocate a big hug. (12E-7003417)

A 76-year old client who has been separated from her husband since 2010 wanted information on her options to protect her property from a 50 year verbally abusive marriage. The advocate advised the client on the difference between a legal separation and dissolution. The client was advised that she could

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dispose of her community interests through a Will which she should have reviewed and updated. The client was also advised to check with Social Security to ensure that she was receiving the correct amount of Social Security based on the fact that they are now separated. The advocate also provided alternatives to avoid probate by listing client's heirs as beneficiaries. (12E-7003900)

Client is 62-year old senior living in a mobile home with extended family – both grandchildren and children. The mobile home park is trying to evict the family for actions of a minor grandson. The advocate represented the client in the eviction action and prevented the loss of her mobile home by negotiating a settlement agreement. The client and her family could stay in their home. (12E-7000225)

Assisted client with establishing the fact of her marriage so as to obtain benefits based on her spouses higher social security earnings. (12E-7003250)

A 61-year old senior with multiple sclerosis needed assistance with enforcement of a spousal support order. The client is unable to proceed without ICLS assistance but first her former attorney had to be tracked down and asked to withdraw from the case. Once the advocate could provide assistance a wage assignment that can be served on the opposing party's Social Security was prepared to get the client some spousal support coming in. The advocate can assist in establishing spousal support arrears once we have her sufficient income to allow her to pay her bills. The client was very happy with our help.

Client came to ICLS because he was being sued in Small Claims Court for approximately \$4,500. He didn't understand what was happening. He stated all he knew was that in December 2011 he had an automobile accident while visiting in Nevada. He could vaguely remember the accident. He did bring a letter from the opposing party stating that he needed to appear in Barstow Superior Court on June 26 at 1:30 pm. He just didn't know what to do. The letter did state that at the June 5 hearing the Judge believed the client appeared bewildered. I asked the client if he had automobile insurance; he stated yes, then, but not now. I asked client if he reported the accident; he wasn't sure. I instructed client to go to the people who he had obtained the car insurance from and make a report. He did that, but he wasn't able to explain to his agent what he wanted. He gave me permission to speak with her. She explained that he did have insurance and that there would be someone from the Insurance company to assist him. Client needed reassurance of what was happening and that someone would help him. I was able to explain this to him. On the day of the court appearance, I called him to make sure he was going to Court. I reminded him that a representative from the insurance company would be there. The insurance agent called the next day stating that through mediation, the original \$4,500 amount was dropped; the insurance company would pay \$1,500 to settle the Small Claim. Our client would not have a judgment against him.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

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

Client age 65 had IHSS hours terminated because doctor had either misunderstood question on DPSS form or was unwilling to comment on residual capacity of client. After requesting hearing, reviewing case file and speaking with appeals specialist and social worker a conditional withdrawal to reinstate full IHSS hours (130.3) was entered into. Client's specialist successfully gave DPSS the verification of limitations that was needed to proceed through eligibility process. Client has maintained aid paid pending through this process.

Client wanted to have a will prepared. After review of assets, it was not necessary to prepare a will as all of clients assets will pass through provisions for beneficiary. It was xxxxCLS also found out that client does not own oil wells or have any interest in Ridgewood Energy. After cooperation from Ridgewood Energy and Sterling Trust client now knows that he has an IRA account (\$49,571.94) with Sterling Trust and nothing with Ridgeway Energy. Client has some learning and comprehension problems and was unable to keep track of his money. He had moved several times and had not received correspondence. Sterling Trust now has current address and client will get quarterly statements. Client has changes beneficiary listed on account and changed his representative (he no longer wants a representative) and provided information to Sterling Trust. Client is age 70.

Counseled and advised a senior who had contract issues with her car company. Client acknowledges that she returned the car after she could no longer afford to pay for the car. The car company sued the client. Client acknowledged that she was served with the lawsuit and judgment was entered. The car company filed for a Default. Default and money judgment against the client was entered. Client is on disability and received a letter advising her of wage garnishment. Client intends on applying for SSDI. Advocate reviewed applicable law as to income exempt from collection and advised client that based on her current SS payments and that she receives disability she is exempt from collection, meaning that those sources of income cannot be taken to satisfy a judgment. Nonetheless, client was advised that she may seek to file a claim of exemption form and attach statement that informs opposing party that only sources of income are SS and Disability which are exempt from collection under state law. Client was also advised to timely inform ER so check is not erroneously garnished. Client thanked advocate for time and stated that all her questions were answered.

Client's mother prepared and executed a Holographic Will in January 2007 and recently died. Client is executrix of her mother's estate and she has distributed most of the gifts left by her mother, save for her daughter's gift (a bank CD) and bank account. Client wants to know what to do after receiving a letter from the bank following her mother's death that advised client that before it will issue proceeds from bank account they need testamentary letters. The client, a senior, did not understand what this means and was seeking an explanation. Advocate advised client that in California estates to through a probate process and advised the client that she will need to file probate action to obtain letters of administration (a.k.a. letters of testament), which will allow her to give documentation to the bank that the client has authority to act on her mother's behalf in distributing the assets according to the decedent's wishes, which would include the bank giving the proceeds of the bank account to the client. Advocate advised

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the client that without the letters the bank will not release the money as they do not want to get sued. Client thanked me for my time and was very happy with the advice given.

Advocate represented a 75-year-old client with her Unemployment Insurance Benefits appeal. The client was originally found eligible for benefits by the EDD but her employer appealed the EDD determination. Client is a monolingual Japanese speaker who did not understand why her employer challenged benefits. ICLS accepted the case to represent the client in the UIB hearing and the advocate requested EDD to provide the client with a Japanese interpreter. The Administrative Law Judge found on one hand that the employer testimony was unreliable since it was based on hearsay. On the other hand, the client was discharged for reasons other than misconduct. Consequently, the client was eligible to continue receiving her UIB benefits.

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 have had several cases recently involving clients who do not speak English. One of these cases involved a limited conservatorship. The parents sought a limited conservatorship over their adult son, who had suffered brain damage after contracting meningitis as a child. The clients, who spoke only Spanish, attended our clinic for help with completing the required pleadings. We were able to obtain a pro bono attorney from the Elder Law Clinic at Chapman Law School to represent the parents in the court proceeding. The court recently approved the limited conservatorship.

In an SSI overpayment case, the client attended our SSI Clinic. She had attended an ALJ hearing, which was continued with a recommendation by the Judge that she obtain representation. She did not speak English and her native language was a dialect of a middle-eastern language. Through the Clinic we were able to obtain a pro bono attorney from O'Melveny and Meyers to represent the client. We are awaiting the decision.

Optional Information on Collaboration with Other Advocacy Groups

We are involved in several collaborations involving elder abuse and its prevention. We have been a member of our local Financial Abuse Specialist team (F.A.S.T.) for many years. Last year we also joined the Orange County Elder Abuse Forensics Center Team. In May, we participated in joint Four-Site Elder Abuse Forensics Center Convening held in Los Angeles. The Convening included members from Orange County and the other 3 California Forensics Centers, including San Francisco, Los Angeles and San Diego.

PSA: 23

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Provider: Elder Law & Advocacy

Counties: San Diego

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

The senior was in need of replacement dentures and went to a dentist to have new dentures made. During the senior's first appointment where they took an impression for her denture replacement, she was informed that the services that the dentist had just rendered were going to total over \$1,700. Shortly after the dental appointment within the same week, she discovered that she had terminal Cancer. The senior called the dentist and asked to immediately cancel the denture replacement order. Unfortunately, The dentist refused to cancel the order and did not refund any money to the senior. Fortunately, she inquired Elder Law & Advocacy and asked for help. The attorney was able to send a letter to the dentist regarding the senior's refund and within 2 weeks, they were able to refund the senior's money.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 24

Provider: Elder Law & Advocacy

Counties: Imperial

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

The senior met with Elder Law & Advocacy's attorney regarding a landlord issue. The senior's air conditioning unit was not functioning properly. In Imperial County, this is a major concern for anyone especially for a senior citizen that had recently been hospitalized for dehydration and heat stroke. The senior informed the attorney that the landlord had been trying to get the air conditioning fixed by sending the apartment complex's handyman to take a look at the unit every time the senior complained about the air conditioning unit, rather than an air conditioning specialist. After the attorney discussed the issue at length with client, the attorney mailed a demand letter to the landlord and sent a copy to the main office of the LLC which owns the apartment complex. Shortly thereafter, the senior called back to let the attorney know that the landlord had brought in an outside professional air conditioning repair service and that her air conditioning unit had been fixed.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 25

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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

Provider: Senior Law Project, Inc.

Counties: Lake and Mendocino

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

The Senior Law Project attorney successfully challenged an alleged \$21,909 overpayment on behalf of an SSI recipient. The case involved the claim that bank accounts in the name of client and her 92 year old father were excess resources of the client. The Senior Law Project attorney successfully argued that client's father had equitable ownership of the funds and client had only legal title for convenience. The entire alleged overpayment was cancelled.

Optional Information on
Collaboration with Other
Advocacy Groups

The Senior Law Project attorney drafted an annual report to Mendocino Board of Supervisors regarding the state of the local IHSS program as well as the state budget issues affecting IHSS. The report was approved by the IHSS Advisory Committee on June 6, 2012 and will be presented to the Board of Supervisors in July.

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

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

Provider: Legal Aid of Napa Valley

Counties: Napa

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

In the past several months, Legal Aid was able to obtain pro bono counsel for several clients with a positive and powerful impact. In one case, a mobile home park owner was trying to raise space rents by \$100/month for seniors on fixed incomes, in violation of a city ordinance. A law firm from San Francisco spent more than 500 hours preparing and then advocating on behalf of the residents and the judge ruled in favor of the residents.
This not only impacts those residents at this mobile home park but may also have a positive impact for the residents at two other parks in the city.
In another case, several pro bono attorneys worked with a resident from the Veterans Home in the Napa Valley who had been sued by the State of California for reimbursement of unreimbursed costs the State alleged the widow owed. Through advocacy, the case against her was dismissed.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 29

Provider: Senior Legal Services

Counties: El Dorado

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 30

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Provider: Dor v' Dor Senior Advocacy Network

Counties: Stanislaus

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

- We won a case regarding unemployment / disability in an appeal before EDD.
- We obtained 20 Restraining Orders, including some move out orders on behalf of clients
- We have been successful in negotiating bill disputes and stopping creditor harassment.

Optional Information on
Collaboration with Other
Advocacy Groups

We refer many clients to other agencies, such as HICAP or the Ombudsman when it is really their services the client needs, and not ours. We have prepared Restraining Orders for clients who are under 60, but are disabled and therefore referred to us by APS. We also refer suspected cases of Elder Abuse to APS and coordinate with Victim's Services to get benefits for victims of crime.

PSA: 31

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Provider: Central California Legal Services

Counties: Merced

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

APRIL 2012

Case No. 12E-3001110, 66 year old, low income, rural and minority female who lives alone sought attorney's assistance with removing her deceased husband's name off of the title of her home. Attorney advised client on the status and disposition of the home. Attorney drafted Affidavit of Death of Joint Tenant and notarized it for client. Attorney also completed additional paperwork as required by the Recorder's Office.

Case No. 12E-3001594, 61 year old male client who lives alone was contacted numerous times by deceased sister's former nursing home for payment of deceased sister's outstanding bills. Attorney advised client on his potential liability for bills depending on whether or not he was a party to the facility's admission contract and assisted client with sending a dispute letter to the nursing home.

Case No. 12E-3002177, 72 year old, extremely low income, minority male who lives alone sought attorney's assistance with completing transfer of home he received as a gift in his mother's will, wherein he was also appointed as Executor of her estate. Attorney advised client on his duties as Executor and on his rights and obligations as a future homeowner. Attorney drafted necessary paperwork for Tax Assessor and Recorder's Office to complete the home transfer and avoid a transfer tax.

MAY 2012

Case No. 12E-3002303, 84 year old, extremely low income client met with attorney to learn about her housing rights. Unfortunately for client, she deeded her home away a few years ago to one of her children, who later sold it. Client had hoped her child would share the home with client's other six children. Advised client that she had no longer had any rights to the home since she no longer owned it and of the proper ways she could have transferred the home to all seven of her children. Also advised client of her current rights as a renter with an emphasis on the special issues that senior tenants may face.

Case No. 12E-3001866, 77 year old, low income, rural and Spanish speaking only client sought attorney's assistance with removing his deceased wife's name off of the title of his home. Attorney advised client on the status and disposition of the home. Attorney drafted Affidavit of Death of Joint Tenant and notarized it for client. Attorney also completed additional paperwork as required by the Recorder's Office.

Case No. 12E-3002387, 63 year old, low income, rural client whose home was recently foreclosed upon was served with an unlawful detainer based on a three day notice to quit. Attorney assisted client with preparing and filing her Answer, Application for Waiver of Court Fees and Costs and the Order on Court Fee Waiver. Attorney also assisted client with completing her Proof of Service and advised her on her rights during and the timeline of the unlawful detainer process.

JUNE 2012

Case No. 12E-3003226, 68 year old, low income, rural and Spanish speaking only client sought attorney's assistance with completing a power of attorney. Attorney prepared and notarized Power of Attorney for client during appointment.

Case No. 12E-3002733, 65 year old, rural client sought attorney's assistance after domestic violence arose in her marriage. Client became a victim of domestic violence starting in September 2011, after 44

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years of marriage. Attorney advised client on her rights and how to report domestic violence and gave client referral to Valley Crisis Center. Attorney also advised client on her questions regarding possibly divorcing or legally separating from her husband.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 32

Provider: Legal Services for Seniors

Counties: Monterey

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

A client was knocked down by a (nice, friendly but really big) golden retriever, suffering a broken leg. Since most of our client's medical costs were covered by Medicare she did not request recovery of anything except her in-home nursing costs but after requesting reimbursement of those charges from the dog's owner, he refused so she sued the owner in Small Claims court. After winning her small claims suit for \$6,000.00, the losing defendant had the right to appeal the Small Claims decision in Superior Court as a "trial de novo" or brand new trial. The defendant (a disbarred attorney from Florida) did appeal. When our client received her summons for the trial de novo, we took on representation for a superior court trial and our then part time attorney Diana Leon represented our client at trial. LSS found out that even with a trial de novo in Superior Court, the informal, relaxed evidence rules of Small Claims court still apply as well as many other small claims rules. The Court was not aware of these "relaxed" rules and if LSS had not represented our client in court, the Court would have required formal evidence rules, formal witness and subpoena requirements, etc.... All these issues and procedures would have been out of the scope of abilities of our 72-year-old client. During the eight hour trial in Superior Court, the defendant was continually and repeatedly rude to the client, our attorney and the Court. The judge ruled in our clients' favor and the defendant still owes her \$6,000.00. If LSS had not stepped in to represent this client in Superior Court, her \$6,000 judgment would likely have been lost. Since LSS has not assisted in a small claims appeal in the past, we viewed representation of this client as an "impact case" and invaluable to understand the process for future clients. Even if we do not assist clients in an official capacity in any future small claims appeal, we now know the process works and will be able to help our clients through it.

Optional Information on
Collaboration with Other
Advocacy Groups

We collaborate with other non-profit organizations to present information on LSS and its services. We collaborated closely with the Homeless Coalition, the Veterans Transition Center, Monterey College of Law and the Caregiver's University group for targeted presentations to seniors and their families. We continue to meet with representatives, drivers, counselors, etc. from Meals-on-Wheels, HICAP, Alliance on Aging, Food Bank, Salvation Army, Kinship/Family Resource Center, local community groups and others with community education and outreach services with the intent to educate these other local non-profit groups about our available legal services so that when they come into contact with seniors who have legal problems, LSS is a resource to which these seniors can be referred.

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PSA: 33

Provider: Greater Bakersfield Legal Assistance, Inc. Counties: Kern

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

Optional Information on Collaboration with Other Advocacy Groups