

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

Fiscal Year: 2013-2014

Quarter: 1

PSA: 1

Provider: Legal Services of Northern California

Counties: Humboldt and Del Norte

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 2

Provider: Legal Services of Northern California

Counties: Shasta, Siskiyou, Lassen, Modoc and 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

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Quarter: 1

Provider: Yuba Sutter Legal Center

Counties: Sutter and Yuba

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

Legal assistance hours for the quarter include 261.75 for Sutter County and 273.50 for Yuba County (535.25 total). Legal representation hours include 72.50 for Sutter County and 56.25 for Yuba County (128.75 total). Grand Total of service units for the 1st quarter of FY 13/14 total 664.00 hours.

The community education activity was 2.50 hours for Sutter County and 4.00 hours for Yuba County.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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Provider: Legal Services of Northern California

Counties: Yolo

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

The client lost her home in foreclosure. After the home was sold, the client was the victim of a scam by a company that falsely promised to keep her in her home for 6 more months if she paid \$1,000. The client paid the \$1,000 but was subsequently served with an eviction lawsuit. She contacted LSNC for assistance. LSNC wrote a demand letter and the company returned the client's money. LSNC also negotiated a settlement with the foreclosing bank.

The 84-year-old client responded to an ad for hearing aids at a substantially reduced priced. There were assessed by the company and informed they did not qualify for the reduced price hearing aids after a video ear inspection revealed significant hearing loss. They provided their insurance cards and were told that almost the entire price would be paid by their insurance plan. The representative then took the client to a back room to sign the contract. He was pressured into signing an agreement for the hearing aids even though he expressed reservations. They called their insurance company after the visit and were informed that the company was not a contracted supplier so they would not cover the adds. The clients faxed a cancellation notice to the company but they refused to honor it. They were provided with the hearing aids but they did not function properly. The clients later learned the hearing aids were refurbished. They returned the hearing aids but were not provided with a refund of their \$1,000 deposit. They contacted LSNC and we wrote a demand letter outlining the company's violations of the law. The hearing aid dispenser promptly issued a refund of the deposit.

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;
 West Sacrament Senior Center on the 2nd Thursday of the month and the former West Sacramento Senior Center on the 4th Thursday of the month;
 Yolo Family Resource Center in Knights Landing on the 3rd Thursday of the month;
 Broderick Christian Center in West Sacramento on the 1st and 3rd Thursdays of the month, targeting the Russian community, homeless individuals and older adults at risk of homelessness;
 RISE in Winters on the 3rd Wednesday of the month.

In addition, LSNC attends monthly meeting of the Multi-Disciplinary team with APS, DESS, and other advocates for older adults. LSNC also participates in regular meetings of the Yolo County Health Aging Alliance (YHAA) and the YHAA Collaboration Subcommittee with other Yolo County senior providers, including the Food Bank, Elderly Nutrition Program, Adult Day Health Center, Supervisor Provenza's staff, Yolo Hospice, Department of Employment and Social Services, Veteran's Service, and representatives from the Senior Centers

Legal Representation: 31.50
 Legal Advice/Assistance: 230.55

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Community Education	13.40
Special Outreach:	2.0
Total Hours:	277.45

Provider: Sacramento Senior Legal Services

Counties: Sacramento

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

A very low income senior subsiding on SSI called Senior Legal Hotline to find out more about debtors' jail. The senior thought that she would be arrested if she failed to make monthly payments towards various debts, some of which she owed and some of which she didn't owe. Senior Legal Hotline advised the client, ensured the client understood her rights against illegal collection tactics, and walked the client through steps she could take to protect herself from financial exploitation. Thanks to Senior Legal Hotline's advice, the senior was empowered to take steps to protect herself from financial hardship and exploitation.

A low income senior with disabilities contacted Senior Legal Hotline after her landlord had threatened to evict her because she had a service dog. The low income senior had secured safe housing after enduring uncertainty for a period of time. The senior was faced with homelessness, as her service dog was necessary for tasks associated with daily living. Senior Legal Hotline advised the senior of her rights and successfully defended the senior's rights against the landlord's baseless and unlawful threats. As a result, this low income senior maintained her safe housing unit and felt empowered to continue to exercise state and federal rights protecting persons with disabilities.

A low income senior contacted Senior Legal Hotline after he received an eviction notice from the new owner of the housing unit he had rented for more than a decade. The senior, a person with disabilities, was being forced to move with less than one month's notice. He had already started to pack up his belongings, discriminating between what was essential and what he could not fit into his vehicle. Senior Legal Hotline advised the senior of his right to more time and assisted the senior in obtaining the full time period he was entitled to under the law, allowing him sufficient time to secure safe housing. Without Senior Legal Hotline's timely advice, the low income senior would have lost his essential and been forced to live in his car.

Optional Information on
 Collaboration with Other
 Advocacy Groups

None Stated Legal services hours: 1239.1; of this, 278.0 representation, 901.8 assistance Community education and advocacy; 59.3

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Provider: Legal Services of Northern California

Counties: Nevada, Placer, and Sierra

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

July 2013

Advocates successfully assisted three seniors facing evictions. Each of the three seniors will remain in their homes without facing an unlawful detainer trail and with a plan to use available resources to remain as independent as possible.

August 2013

LSNC successfully negotiated the rescission of a Three Day Perform or Quit Notice for a senior who had not paid his accumulated utility bills. The elderly gentleman desperately wanted to continue picking up his grandchildren from school while his daughter worked and decided to have his automobile fixed when it broke down instead of paying his utility bills. He thought he had made an agreement with 'his landlord to make payments but got the 3DPPQ instead. LSNC stepped in and called the resident manager who refused to speak about the matter. LSNC was able to contact a supervisor and the landlord's attorney to have the 3DDPQ rescinded and the previously negotiated agreement honored. LSNC also recognized that the elderly gentleman's budget was stressed because he was repaying a student loan for which he co-signed. LSNC provided information about waivers and discharge of student loans. The gentleman has been granted a one year waiver which will give him time to repay some of his other debts and stabilize his living situation.

September 2013

Mother Lode Regional received a call from a 61 year old Placer widow anxious because her home was scheduled for auction in 10 days. When husband died she simply could not manage her affairs on her own and she done the best she could to work with her lender. MLRO staff opened the case, gave Mrs. L some immediate steps to take, and told her we would contact her the same day for more information and assistance which 'stopped the auction. Mrs. L. was also given information about her choices going forward and offered "one-on-one" assistance by a foreclosure prevention attorney. Mrs. L. successfully obtained a new mortgage which will allow her to remain in her home.

MLRO assisted an elderly couple when a real estate agent came to their home with 'two unknown persons to measure the rooms of the elderly couple's rental home. The real estate agent told them the home had been sold. The elderly couple called their landlord to learn that the home had not been sold but it was for sale. He told them they had to out in two weeks. They had never failed to pay the rent in five years and were devastated to leave their home on short notice. A MLRO advocated assisted the couple with writing letters to the landlord and his real estate agent asserting the couple's rights to appropriate notices and time to vacate. The landlord acknowledged that he was obligated to communicated with his tenants and provide appropriate written notices. The real estate agent no longer came out unannounced. The couple eventually received appropriate written notice to vacate giving them much more time to find a new home.

Client contracted with a debt consolidator re c. \$30k debt per 5 credit cards. Consolidator settled with only one of the original creditors, but continued to assess service charges to cl... Nevada County office

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Optional Information on
Collaboration with Other
Advocacy Groups

vol. atty Bob Joehneck discovered that by the terms of the contract, cl.'s debts would never have been paid off by the consolidator. Mr. Joehneck reported the case to the Federal Trade Commission as a possible matter of financial elder abuse, and then he successfully negotiated a contract rescission and a refund of all monies owed to the cl.

August 2013

LSNC provided information and direction APS on a situation in which an elderly senior's agent/daughter was not paying the senior's bills from her memory care facility. The daughter was misdirecting her mother's social security and pension income to someone else. LSNC could not provide information to APS regarding how they might stop the daughter's access to her mother's income until a criminal complaint could be processed.

September 2013

Mother Lode Regional Office (MLRO) advocates and staff continue to reach out to organizations and individuals who work with or can assist older adults. Recent funding cuts have forced partner agencies to cut staff and hours including court hours and services, Victim Services, county elder abuse teams, IHSS, hospital discharge planners, hospital social workers, etc.

In the wake of these changes MLRO has:

1. Increased outreach to local county bar association to increase pro bono participation. We have added several new volunteer attorneys.
2. Formed a partnership with the Placer Superior court to provide assistance to indigent pro per civil litigants – including older adults – at the Placer County Law Library and at the Santucci Justice Center in Rocklin. Services at these two sites are restricted to assistance completing court forms and documents.
3. Formed a partnership with the Gathering Inn. A new volunteer attorney assists homeless persons – including older adults – with legal issues involving matters such as denial of earned benefits and housing.
4. Increased the types of services provided by volunteer attorneys at five clinics held each month exclusively for older adults.
5. Agreed to continue providing representation to Social Security Disability and SSO applicants who are appealing a denial of benefits and who receive Placer County indigent program services. This project is funded by Placer County. This program serves older adults as well.
6. Assisted the Placer Consortium on Homelessness to incorporate into a non-profit entity that would be eligible to apply for, receive and administer grants addressing homelessness in Placer and Nevada Counties.
7. Agreed to provide several internships for Placer Calworks participants. The participants must have the appropriate level of training for the position and work with MLRO staff person. These internships provide support to our Older Adult Program services.
8. Provided office space, support staff and advocacy staff assistance for an attorney with LSNC-Health program. This new program is open to all ages and is available to older persons without insurance and without MediCare coverage. The MLRO LSNC-Health attorney will focus on the needs of rural populations and minorities in our service area. HICAP still provides services for persons with MediCare coverage.

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Established a case handling protocol and procedures policy with the LSNC-Foreclosure Prevention and Advocacy Project. This is another new LSNC project which serves all ages. The MLRO cannot provide office space for these new attorneys, but MLRO advocates have almost immediate access to them via telephone, email and text. One of the first foreclosure cases accepted by this office in coordination with the new Foreclosure Project attorneys was successfully handled by email, text and telephone with the client. [See "Success Stories" above]

PSA: 5

Provider: Legal Aid of the North Bay

Counties: Marin

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

No narratives to include

Optional Information on
Collaboration with Other
Advocacy Groups

No narratives to include

PSA: 6

Provider: Legal Assistance to the Elderly

Counties: San Francisco

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

Client is a 65 year old white male, who lives in a South of Market single room occupancy hotel. He has a serious alcohol abuse problem and faced eviction based upon his behavior while intoxicated. Following the incident in question, client was admitted to an inpatient detoxification program. We negotiated a stipulation on his behalf which permits him to retain his tenancy provided the behavior does not recur.

Optional Information on
Collaboration with Other
Advocacy Groups

We continue to work closely with San Francisco's Adult Protective Services. While we are not a mandated reporter, when appropriate, we encourage clients to self-report, first discussing the pros and cons of reporting with them. We consult with individual APS workers on a variety of legal issues, most notably evictions and restraining orders. We represent APS' clients in both of these matters, often working with workers who ensure that clients show up for appointments and court dates, or receive services needed to successfully resolve their legal problem, such as financial management, case management and medical services.

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Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

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

Example 1

Tony wanted to apply for naturalization for a long time. He submitted the naturalization application about a decade ago, but his application was rejected because he submitted the wrong fee. He never got around to resubmitting it. Last year, he finally decided he will apply again.

His naturalization application was complicated by two factors: (1) he was involved with another woman (now his wife) and had children with her even while he was still married to someone else. This is a potential GMC issue. (2) He seemed to have inadvertently failed to list some of his children in his immigrant visa application. He does not have a copy of this visa application and has no clear recollection of whether he actually listed all children or not. While this error was inadvertent and immaterial to his eligibility to naturalize, it made the interviews complicated. The immigration officers probed closely at whether it was this was an intentional mistake, thereby becoming a GMC issue (specifically false testimony or misrepresentation). Fortunately for Tony, he was represented during the entire naturalization process and his attorneys were able to remind the officers about the legal standard for misrepresentation. He became a US Citizen earlier this year.

Lessons learned by way of analysis and reflection: Tony's case highlights the necessity of having attorney representation for complicated naturalization applications. Around the same time that Tony applied, another Bay Area resident's application was denied for exactly the same reason--the latter failed to include some of his children's names in his immigrant visa application. The bare facts and the applicable laws are the same in both situations, but they ended very differently. Tony passed and became a US citizen. The other applicant was denied, and now faces a more complicated naturalization application process in the future, simply because he didn't have the luxury of having an attorney with him for the entire process.

Example 2: Mr. and Mrs. Rose wanted to apply to be US citizens but couldn't afford the \$680 fee. With Kate Feng's help, the couple submitted a thorough and complete application, which documented their eligibility for the fee waiver. And, with Nikki and Stella's accompaniment, the couple passed their naturalization interviews. They became US citizens in August 2013.

Mr. and Mrs. Rose's Case lesson: Many eligible applicants choose not to apply because of the expensive naturalization application fees (\$680 per person). What they don't know is that they may be eligible for a fee waiver. Because Kate was able to help, our office was able to submit their application sooner than initially anticipated. Mr. and Mrs. Rose's US citizenship status has a very real impact on their daily lives--they may now be eligible to get public benefits such as Food Stamps (whereas they would have been precluded from obtaining them due largely to their immigration status).

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Optional Information on
Collaboration with Other
Advocacy Groups

Identifying the many barriers preventing seniors from obtaining assistance led API Legal Outreach to found the API Elder Abuse Task Force in 2000. The Task Force works with other community and city agencies such as Canon Kip, Self-Help for the Elderly, Kimochi, On Lok, Protection and Advocacy, Veterans Equity Center, Adult Protective Services, the District Attorney's Office, the Mayor's Long-Term Care Council and the API Partnership for community-Based Care and Support to strengthen services, provide technical assistance, and conduct community trainings about the prevalence of elder abuse and the availability of culturally and linguistically competent resources.

Provider: Asian Law Caucus

Counties: San Francisco

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

We assisted several SRO tenants who were temporarily evicted in order for the landlord to renovate the property. The project lasted for almost one year, and the landlord requested a further extension from the Rent Board. This was denied, and we coordinated with the landlord in having tenants return. Several decided that they would rather remain in their new units, and we were able to negotiate various settlements so that the tenants would receive compensation. One tenant, who is disabled, preferred to remain at a different residential hotel because it had an elevator. For that tenant, we were able to help him negotiate an innovative form of compensation in the form of a lifetime monthly payment from the landlord to cover the increased rent the tenant was paying. To do this, we established a trust, so that the tenant's SSI benefits would not be affected.

Optional Information on
Collaboration with Other
Advocacy Groups

N/A for this quarter.

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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

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

July Client: A Spanish speaking senior came to our clinic with an 120 days eviction notice based on Ellis Act (remove the unit from the rent market). The client was also disabled and there were minors living in the unit, all special cases that warrant a 1 year eviction notice not just 120 days. We our help the client was able to send a letter to the landlord and Rent Board explaining that he is older than 60 years of age, disabled and living with minors, and thus all belong to a protected class under the SF Rent Ordinance. We filed a complaint before the Rent Board for Wrongful Eviction and as soon as the landlord received notice of our filing he proceeded to dismiss the notice of eviction. Now our client has 12 months to find a more suitable place that fits his special needs without having to rush plus the due relocation benefits according to SF law.

August Client: A mono-lingual Spanish speaking senior resident came to our La Raza Senior Law Clinic to report that his SSI benefits were suspended due to an alleged overpayment resulting from his funeral arrangements connected to a life insurance. The insurance policy had a face cash value redemption feature that exceeded \$2,000 limitation under the SSA rules. With our assistance, the client transferred ownership of the policy to a family member and therefore was able to have the benefits reinstated and got a convenient settlement agreement regarding the overpaid amount for the past three years.

September Client: A low income husband and wife senior residents living only on social security payments came to our Clinic distressed by the monthly payments they needed to make to service their credit card debts. They expressed that the payments were completely unaffordable to the point that it adversely affect their health and living conditions if they continue servicing the debt. We contacted the creditors under the Fair Debt Collections Practices Act to request they cease and desist in their attempts to collect the cited debt as the debt is uncollectable due to the fact that the social security payments are exempted from liens and any other judgment enforcement. The creditors confirmed that they would not pursue further attempts to collect the debt.

Optional Information on
Collaboration with Other
Advocacy Groups

We had a very uneventful Summer 2013. We provided presentations and Q&A sessions on public benefits, housing, consumer fraud and estate planning for a diverse group of seniors including Hispanics and Afro-Americans.

We keep participating actively at the Latino Partnership with monthly meetings at the 30th Street Senior Center where we share point of views and talk about common issues. Likewise, we keep collaborating with the Senior Rights Bulletin by providing pertinent articles for seniors and providing proofreading and editing for the Spanish version of it. We just drafted an article on Funeral Arrangements and the need to be careful when signing insurance policies connected to 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.

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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: 1

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

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

Ms. L and her husband live on \$2,000/month in Social Security benefits, and do not have enough money after paying rent and normal living expenses to pay for food for the entire month. She applied for CalFresh benefits but was denied for having too much income. She turned to Legal Aid's Senior Advocates attorney who reviewed the denial and determined that the Human Services Agency had not given Ms. L a deduction for the many unreimbursed medical expenses that she and her husband incurred, which the CalFresh rules require for seniors. Legal Aid helped her request a hearing and negotiated with the County representative to settle the case. The County agreed that they should count her medical expenses and approved benefits retroactively back to her initial application date. As a result, Ms. L and her spouse get \$68 a month to help them buy groceries so that they don't go hungry at the end of the month.

Ms. C is a widow and suffers from depression. She came to Legal Aid because a billing company was harassing her to pay over \$2,000 based on a dating service contract that she had tried to cancel. She had paid an initial \$350, but cancelled after realizing that this service was not what she thought it was. After informal discussions with the billing company and the dating service failed to resolve the dispute, Legal Aid sent a demand letter to the company. The company agreed to cancel the service for Ms. C with no additional payment on her part.

Optional Information on
Collaboration with Other
Advocacy Groups

The Senior Advocates attorney continues an active role in the Adult Abuse Prevention Committee and its work on bringing the Theatre of the Oppressed model to San Mateo County to help improve residents' awareness of elder abuse and ways to prevent it.

The attorney is also an active participant with the Senior Legal Services Provider section of the Legal Aid Association of California. In August, she attended the statewide meeting which involved dozens of advocates from throughout the state and a number of AAAs. During this meeting, the attorney facilitated the discussion on elder abuse and how legal services providers throughout the state are working on this issue.

During September, the Senior Advocates attorney met with a number of the social workers from Aging and Adult Services to talk about Legal Aid's services and how to improve collaboration between A&AS and Legal Aid. She also presented a training on elder abuse restraining orders to over 40 statewide participants during a webinar. The participants included attorneys, paralegals, and social workers.

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 successfully represented Mrs. L, a 79 year old widow, at her Social Security hearing in July of 2013. Mrs. L's first language is Cantonese, she speaks minimal English, and her only source of income is SSI.

Many years ago, Mrs. L and her husband had purchased a cemetery package and a life-insurance policy to fund funeral arrangements. In May of 2013, the Social Security Administration (SSA) suddenly and erroneously began counting these items as available resources. This mistaken classification resulted in the SSA believing that both Mrs. L and her late husband had not been eligible for SSI for several years, which generated a \$21,000 overpayment for Mrs. L and a \$12,000 overpayment for her late husband. The Social Security Administration then tried to collect this \$33,000 overpayment from Mrs. L. Although Mrs. L's son helped her file a timely appeal, the SSA wrongfully stopped her SSI payments in direct violation of her due process rights.

LAS's Chinese-speaking Advocate and Health Law & Public Benefits Advocate worked with the client to gather the necessary information and documentation to request that her benefits be reinstated pending the appeal. Shortly after LAS got involved, Mrs. Lam was granted a hearing date. Our Health Law & Public Benefits Advocate represented Mrs. L at her hearing, with Mrs. L's son there to translate. Less than a week later, the hearing officer called LAS to report a favorable decision: both overpayments had been taken care of, Mrs. L's SSI payments would be reinstated, and she would get back payments from June and July

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 have 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 1st Quarter of 2013-14, SALA provided on-site legal service intake appointments at 22 senior centers or sites in Santa Clara County. These sites included: 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 Center (San Jose) Eastside Senior 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 on Local Task Forces
For the 1st Quarter of 2013-14, SALA attorneys also participated in the July, August, and September meetings of the Elder Abuse Task Force of Santa Clara County and the July meeting of the Housing Task Force.

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: 1

Provider: Catholic Charities

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

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 County & San Benito County

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 14

Provider: Central California Legal Services, Inc.

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: 1

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

Provider: Central California Legal Services, Inc.

Counties: Tulare

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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Quarter: 1

Provider: California Indian Legal Services

Counties: Inyo & Mono

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

We were contacted by four separate clients that needed assistance in being advised on what assets Medi-Cal can and cannot recover from their families upon passing. We counseled and advised each client based on their individual circumstances so they were equipped with the information to provide to their families.

We were contacted by four other separate clients requesting assistance with Estate Planning. We counseled each client including preparation of power of attorney and advance health care directive forms to protect the each clients assets and assist their families while the clients were each entering long-term care facilities.

We counseled and advised a client on protecting her assets by having an irrevocable gift deed prepared with life estate reserved. Client had previously been mis-informed that creating a living trust would protect client's assets from Medi-cal recovery upon the client's passing. We advised the client that the living trust will not protect against recovery of client's residence and also educated the client on Medi-cal rules, eligibility and the recovery process.

We counseled and advised a client that recently had entered a long-term care facility and did not understand her life insurance policy, annuity or long-term care insurance. We met with the client, reviewed her policy and annuity documents and walked the client through each document, its purpose and answered client's questions.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 17

**California Legal Services (Title III B)
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Fiscal Year: 2013-2014

Quarter: 1

Provider: Not Provided

Counties: Santa Barbara and San Luis Obispo

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

We represented a client at a Temporary Restraining Order hearing at which we were able to obtain an agreement with the Respondent (our client's tenant) to move out of the client's home within 14 days and stay away from her and her home for a year. It was a good outcome for the client because she got what she wanted and was able to avoid an unlawful detainer action.

We successfully obtained a 5-year restraining order for a senior woman against her ex-husband who has dementia and has become more violent in his old age.

We represented an elderly north county couple who are 84 years old and being evicted from their low-income housing in Atascadero. We appeared at the unlawful detainer trial and negotiated a settlement to allow them an additional 90 days to vacate and find alternate living. We were also able to facilitate a \$250 donation from SLO Womenade to cover the balance of their August rent.

Of the 100.3 client hours reported this month, 73.8 were provided by the Project Director and 26.5 were provided by volunteer attorneys.

We helped a woman evict a male tenant from her house who became hostile and threatening toward her after she gave him notice to move out. She was so afraid of him, that she wouldn't live in her house while he was there. We filed an Unlawful Detainer Complaint on her behalf and he moved out.

Of the 77 client hours provided in September, 49 of those hours were provided by the Director and 28 by attorney volunteers. Intern hours were not counted.

Optional Information on
Collaboration with Other
Advocacy Groups

Starting in September 2013, SLO Legal Alternatives Corporation will add a new monthly outreach site at the Central Coast Senior Center in Oceano.

PSA: 18

Provider: Grey Law of Ventura County Inc.

Counties: Ventura

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 19

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

Fiscal Year: 2013-2014

Quarter: 1

Provider: Bet Tzedek

Counties: Los Angeles

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 20

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

Fiscal Year: 2013-2014

Quarter: 1

Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

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

Case #1: 13E-7005161

The client, a 75 year old woman whose only source of income is her SSI, requesting ICLS assistance because her SSI has been reduced to \$300 per month because she was charged with an overpayment in excess of \$7,000. According to the client, she had been employed as a caregiver for a man who had died and left her one of his homes in his will. The client stated that she was unaware she had inherited a house and did not find out until SSI told her. The client stated that she had no choice but to sell the house, she could not afford the mortgage payments and also needed the money to live on since her SSI had been drastically reduced. After the outstanding mortgage and SSI overpayment was paid, the client was left with about \$38,000 which she had been using to live on. The client states that the house was sold for the FMV (fair market value) and that she should not have been punished. The house had a lot of damage done to it by a woman who was living there and is now incarcerated; and she did not have the money to pay what it would cost to repair the damage.

The advocate advised the client to request a hearing from an ALJ (Administrative Law Judge) immediately and obtain a copy of the appraisal and any other documentation to prove the condition the house was in and what the FMV was at the time it was sold. The advocate hopes to be able to represent the client before the ALJ and obtain a favorable decision on her behalf by having her full SSI payments restored. The client stated that she was relieved that she will not be dealing with this by herself and thankful that she will not have to worry about how much it is going to cost her.

Case #2: 13E-7006252

On August 6, 2013 a 66 year old Spanish speaking client requested the services of ICLS regarding a lawsuit filed against her for breach of contract on a credit card debt of \$6,791.15. The client did not file an answer and research on the court website indicated a default of judgment was pending against the client.

The advocate contacted the opposing counsel on the client's behalf and was successful in negotiating a settlement amount for \$4,248.69 as payment in full. It was stipulated that \$3,000 was to be paid by August 21, 2013 and 3 consecutive monthly payments of \$416.23 would be paid, each due by the last day in September, October and November 2013.

If the client does not default, a Dismissal with Prejudice would be filed by opposing counsel. After receiving the Stipulation for Entry of Judgment, an ICLS staff attorney assisted in reviewing and approving before the staff paralegal had the client sign. The advocate advised the client to contact her by phone about 20 days after making her final payment in order for the advocate to confirm that a Dismissal with Prejudice was filed.

The client received approximately 2 weeks to borrow the \$3,000. If the client does not default she will avoid having to pay additional interest and attorney fees and will also avoid having a judgment entered against her. The client was grateful for having received the free legal assistance.

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

Fiscal Year: 2013-2014

Quarter: 1

Case #3: 13E-7006066

This senior client contacted ICLS after her husband had committed suicide to ask what she needed to do legally. The advocate spent considerable time with the client to establish the marital home was paid for but still listed with the husband as joint tenant. After reviewing the grant deed the client was advised and assisted in preparing the documents to remove her husband's name from the deed. The advocate discussed options available to the client on estate planning including placing the home in the name of the children as well as making sure that the client retained a life estate in the property to ensure she would always be able to remain in the home. The client is a legal resident who although fully competent, needed assistance in understanding the complicated legal issues regarding her home. She was very grateful for the assistance.

Case #4: 13E-7007501

A recently laid off senior contacted ICLS for assistance regarding her Unemployment Benefits. An Administrative Hearing was scheduled in 5 days. The client had been employed as a Nutritionist at a senior center. A new agency was going to take over the contract and the position was already filled. The Director of the new agency personally spoke with the client to inform her. The client applied for Unemployment Benefits and about a month later she received a notice from EDD informing her that her previous employer disagreed and filed an appeal claiming that she had lied because she had quit. The client was beside herself, the statement was completely false. She was so upset that she was in tears. The client didn't know what she was going to do and was in fear of losing her Unemployment. She was so upset and scared – she did not want to go alone and wanted someone to represent her. The advocate agreed to represent the client and advised her to contact the Director of the new agency to request he testify at the hearing or provide her with a letter stating what he had discussed with her. Before the hearing the client provided the advocate with a copy of the letter she had received from the Director which clearly supported the client's claim. When it came time for the hearing the client's former employer did not show or call and the case was dismissed. The client was so relieved she said "finally I will be able to sleep at night". The client was so grateful for the assistance and support she received from ICLS that she gladly donated \$100 to ICLS.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 21

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

Fiscal Year: 2013-2014

Quarter: 1

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

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

Case #1: 13E-2003078
Senior client had her bank account levied against by the Franchise Tax Board (FTB). The ICLS advocate contacted the FTB and found out the legal process regarding the client's bank levy and what the client needed to do to remedy/file for hardship, etc. The advocate also found out what the client needed to do to avoid future levies since there are additional tax years she has not filed for, namely 2011 and 2012. The advocate sent the client a closing letter along with copies of documents that had been obtained in the client's behalf (the client alleged that she had never received notice of the tax bill, levy, etc., she had received nothing). The advocate explained that the client needed to contact the FTB by May 24, 2013 or she will be assessed penalties, etc. and be subject to bank levies again if she does not contact them. All contact information is in the copy of the letter from the FTB the advocate sent to the client.

Case #2: 13E-2005860
Assisted a senior with the Housing Authority (HA) due to threatened termination of her Section 8 benefits because her granddaughter had come back to live with her over the summer. The ICLS advocate was able to get the benefits reinstated and explained to the client that in the future if there is a change in income of household members she must, within 10 days, report it to the HA. The advocate also told the client that if there was ever any confusion to call ICLS and we could assist her. The client was very happy with the outcome. Her share of rent went up because the new contract takes into consideration the income she gets from California Department of Social Services (CDSS), - the income she had failed to report. The advocate advised her than when her granddaughter turns 18 in October and if CDSS stops the cash aid for her to report it to the HA and her share of rent will go back to the \$295.00 she was paying before she got the grant from CDSS. Currently her share is \$381.00. The granddaughter has been added to the household so the client does not have to force her to leave now if she does not want to.

Case #3: 13E-2005142
The client's Medi-Cal was recomputed to where he would have a Share of Cost (SOC) of \$697.00. The client could not afford this SOC because he has an In Home Support Services (IHSS) worker that Medi-Cal pays for and he would now have to pay the first \$697.00 of her wages (meaning that he must pay this SOC amount each month before Medi-Cal will pay anything).

The advocate helped the client by requesting a hearing to buy time so that the client could get supplemental insurance. Medi-Cal will deduct any amounts paid in medical premiums from the household income, so once he pays for the supplemental insurance it will bring his income down and he will not have a SOC.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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

Fiscal Year: 2013-2014

Quarter: 1

PSA: 22

Provider: Legal Aid Society of Orange County

Counties: Orange

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 23

Provider: Elder Law & Advocacy

Counties: San Diego

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

NOT APPLICABLE FOR THIS QUARTER.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 24

Provider: Elder Law & Advocacy

Counties: Imperial

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

NOT APPLICABLE FOR THIS QUARTER.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 25

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

Fiscal Year: 2013-2014

Quarter: 1

Provider: Bet Tzedek

Counties: Los Angeles

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 26

Provider: Legal Services of Northern California

Counties: Lake and Mendocino

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

Successfully represented a developmentally disabled senior in a public housing authority hearing and obtained a favorable decision reversing the housing authority's termination of senior's rental assistance.

Successful represented a senior in an elder abuse case involving a son that was engaging in activity that was abusive and threatened the senior's housing. Because of our representation, the housing provider agreed to withdraw a termination notice and we obtained an order for the protection of the senior.

Successfully represented a (minority) senior in an eviction case, that resulted in a favorable settlement allowing for extension of move out time and rental assistance in new housing.

Office obtained reimbursement for a senior of all monies obtained for services not rendered (services were allegedly for assistance with medi-cal application) by a scammer.

Assisted senior in obtaining and gathering evidence to prove eligibility for CalFresh Z (senior had previously been denied for prior drug history-from many years prior-but had gone through successful rehabilitation).

Assisted senior against an out of county company with cancellation of a contract for hearing aids. Company also reimbursed senior withal monies that had already been paid for the (returned) hearing aids.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 27

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

Fiscal Year: 2013-2014

Quarter: 1

Provider: Council on Aging

Counties: Sonoma

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

APS referral to COA for assistance with:
1)Durable Power of Attorney and Will for client
2)Will Codicil
3)Judgment Proof Letters
LINKAGES referral to COA for assistance with:
1)Will
2)Revocation of Durable Power of Attorney for Finance
3)Judgment Proof Letters, Creditor and Collection Issues
COA referral to HICAP for assistance with:
1)Medicare statement
2)Supplemental Insurance

PSA: 28

Provider: Legal Services of Northern California

Counties: Solano County

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

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Optional Information on
Collaboration with Other
Advocacy Groups

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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

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

Fiscal Year: 2013-2014

Quarter: 1

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

Provider: Dor v' Dor Senior Advocacy Network

Counties: Stanislaus

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

•We continue to have good results in obtaining restraining orders on behalf of seniors against family members for elder physical and financial abuse.

Optional Information on
Collaboration with Other
Advocacy Groups

We continue to work closely with the Ombudsman office and APS on elder abuse cases occurring in assisted and skilled nursing facilities.

We continue to be a part of SEAPA – Stanislaus Elder Abuse Prevention Alliance and collaborate with the DA's office and the other SEAPA Core members.

PSA: 31

Provider: Central California Legal Services

Counties: Merced

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 32

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

Fiscal Year: 2013-2014

Quarter: 1

Provider: Legal Services for Seniors

Counties: Monterey

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

An 82-year old client came to our Peninsula office seeking a restraining order against his stepdaughter who had threatened him with a knife in his own kitchen. Stepdaughter, who lived with our client, has an alcohol problem (she's been arrested four times for DUI in the past three years), Andrea Maroney, an attorney in our Peninsula office prepared and filed a restraining order on his behalf and appeared with him in court on hearing day. Stepdaughter, who was in jail at the time of the hearing (for another DUI) appeared in court and wanted to cross-examine our client. Because of that, what is usually a five minute court appearance turned into a full evidentiary hearing. Because our client had not anticipated the need for his testimony, he was understandably nervous. Andrea took control of the situation, calmed our client on the stand with her questions and handled her opening and closing statements as well as her direct and cross examination perfectly. After all the facts were heard, our client's restraining order was issued, protecting him for three years.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Services for Seniors collaborates at some level with virtually all other County non-profits serving the senior community. Legal Services for Seniors regularly collaborates with the Alliance on Aging and Meals-on-Wheels and the Alzheimer's Association regarding seniors services provided to seniors through our AAA funds. Legal Services for Seniors serves as a staff educator, referral and presenter to other non-profit organizations such as Meals on Wheels of the Salinas Valley, where we annually present an overview of our services to MOW drivers to help the volunteers identify potential legal situations from which our shared clients may suffer.

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