

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

**Fiscal Year: 2010-2011**

**Quarter: 4**

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**PSA: 1**

**Provider: Legal Services of Northern California**

**Counties: Humboldt and Del Norte**

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

None Provided and Stated so in email.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Provided and Stated so in email.

**PSA: 2**

**Provider: Legal Services of Northern California**

**Counties: Shasta, Siskiyou, Lassen, Modoc, 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)**  
**PSA Level Quarterly Narrative Report**

Fiscal Year: 2010-2011

Quarter: 4

Provider: Legal Services of Northern California

Counties: Placer, Nevada, Sierra

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

June 2011

Staff provided assistance to a senior, "Mrs. R", who had recently moved into her daughter and son-in-law's home. Mrs. R asserted that she was being emotionally abused and threatened with physical abuse. MLRO advocates worked with Adult Protective Services to evaluate Mrs. R's needs and coordinate legal and social services. The client was offered and accepted placement in a senior safe house. With LSNC's help Mrs. R completed the process of revoking the power of attorney granted to her daughter. A safe house volunteer provided transportation to her medical appointment to restore her medications. On LSNC's advice, Mrs. R contacted her bank to change her accounts. Her bank reviewed activity on her account and initiated an investigation of potentially misappropriated funds. Mrs. R was given information about available services through which she could arrange new housing and further transportation. This client successfully arranged new housing with the funding assistance of a local charitable organization.

"Mrs. P." is a frail and memory impaired senior raising her two grandchildren. Staff assisted Mrs. P. with unfair debt collection activities by her landlord and her landlords' property manager. The owner and the property manager alleged that Mrs. P failed to pay one of her utility bills. They sent the owner's family members to Mrs. P's home more than once and threatened her with eviction. Mrs. P's family was contacted and told that their mother "forgot" to pay the bill. However, the landlord and her property manager refused to provide Mrs. P or her family with a written accounting or a copy of the utility bill. Mrs. P was told by the utility agency that they could only send the bill to the owner and that the owner had to provide their renter with a copy. Mrs. P attempted to calculate what she owed based on speaking with her neighbors. She calculated an amount which she believed would satisfy the debt and finally paid this amount directly to her landlord's utility account. When a representative of the property manager came to Mrs. P.'s door on Christmas Eve demanding more money and threatening to evict her again, she became despondent. Eventually, a family member suggested she contact LSNC. LSNC assisted by contacting the property manager and the owner for copies of the bills from the time Mrs. P took possession of the home. The owner and her agent declined to provide this information and instead filed a Small Claims action against Mrs. P. for breach of her lease. LSNC began preparing Mrs. P. for her Small Claims hearing. LSNC learned that the previous tenant of this same home had left a balance owing on the utility account when he vacated. The owner admitted she "mistakenly" included the previous tenants' unpaid bill in Mrs. P.'s unpaid balance. LSNC also learned that part of the alleged unpaid utility bill was actually a non-utility assessment against the property which the owner and her property manager improperly included in their verbal demands for payment from Mrs. P. LSNC assisted Mrs. P with filing a complaint against the property manager with the California Department of Real Estate (CDRE) concerning the unfair and deceptive debt collection practices. CDRE contacted the property manager and advised her to provide the documentation requested by Mrs. P and suggested she ask the owner to dismiss the Small Claims action against Mrs. P. for collection of the disputed utility bill. Mrs. P.'s family was contacted and the matter resolved. The Small Claims case was dismissed against Mrs. P.

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Optional Information on  
 Collaboration with Other  
 Advocacy Groups

<p>April 2011          Advocates continue working with our partners in the Homeless Prevention and Rapid Rehousing program to assist seniors facing loss of housing. Partners in Placer County include the Salvation Army, KidsFirst and the Sierra Aids Foundation.</p> <p>Advocates participate in Placer County Collaborative service meetings and conferences. These meetings and conferences provide updated information on resources for seniors, children and families in Placer County.</p> <p>May 2011          Advocates continue working with our partners in the Homeless Prevention and Rapid Re-housing program to assist seniors facing loss of housing. Partners in Placer County include The Salvation Army, Kids First and the Sierra Aids Foundation.</p> <p>Advocates participate in Placer County Collaborative service meetings and conferences. These meetings and conferences provide updated information on resources for seniors, children and families in Placer County.</p> <p>June 2011          Advocates continue working with our partners in the Homeless Prevention and Rapid Rehousing program to assist seniors facing loss of housing. Partners in Placer County include the Salvation Army, KidsFirst and the Sierra Aids Foundation.</p> <p>Two Auburn advocates participated in the LAAC Senior Regional Services Meeting in Sacramento with ombudsman managers and other advocates from Northern California to discuss coordination of resources and best practices.</p> <p>Monthly Service Units Report</p> <p>Month:</p> <p>Title of Service Unit    Unit Number of Units          a. Legal Assistance    1 hour 547          b. Legal Representation    1 hour 154          c. Legal Education &amp; Advocacy    1 hour 50          d. Total Legal Services (a+b+c)    1 hour 751</p>
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Legal Services by County
PlacerNevadaSierraTotal
Assistance3991426547
Representation134191154
Community Education/Advocacy2621350
Totals55918210751

**Provider: Sacramento Senior Legal Services**

**Counties: Sacramento**

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**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: Legal Services of Northern California

Counties: Yolo

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

Client's identity was stolen by unknown parties who purchased at least 11 homes using client's information. Client discovered the identity theft after he received a call from Bank of America reminding him to make his payments on a home in Virginia. Client told the representative that he did not take out a loan or purchase property in Virginia. He filled out an affidavit and got what he thought was a clearance letter. He recently decided he should check his credit to make sure the debt wasn't listed. He went to the three major credit reporting agencies and found that his identity was stolen and used to procure massive amounts of debt. Client sought assistance from LSNC advocates, who are working with the client on the long process of removing the debts incurred by the person or people who stole his identity.

Client, age 60 and disabled, applied to live in a seniors-only mobile home park. While the park allows dogs, they do not allow dogs over 20 pounds. Client's companion animal is a 70-lb Labrador retriever. The mobile home park initially told client that his application would not be approved because of the size of his pet. We drafted a letter to the mobile home park describing the law that requires companion animals to be allowed no matter their size. Client's application was approved and he is moving into his home within the next month.

Client, age 63, was an owner in foreclosure after his HAMP application fell through. He received an unlawful detainer notice evicting him out of the home he shared with his family. We negotiated with the buyer's attorney for a cash for keys agreement that gave client time to find a new house to move his family. We were able to negotiate this settlement despite the large amount of costs that the opposing side had already incurred by filing the initial unlawful detainer action. Client is now living happily in a new house with his family.

Client, age 64 and a non-English speaker, was a victim of fraud by one of her sons. He took out a \$50,000 line of credit in her name. The creditors started contacting and harassing our client. We contacted the creditors on client's behalf and were able to negotiate cancellation of the debt and the removal of the debt from client's credit reports.

Optional Information on  
Collaboration with Other  
Advocacy Groups

LSNC staff held office hours at the following locations: Rural Innovations in Social Economics (RISE), a non profit agency serving low income persons in Esparto, on the 1<sup>st</sup> Thursday of the month; the West Sacramento Senior Center on the 2<sup>nd</sup> Monday of the month; and the Yolo Family Resource Center in Knights Landing on the 3<sup>rd</sup> Thursday of the month. LSNC also collaborated with the Winters Branch of the Yolo County library, the Davis Senior Center, the District Attorney's office and RISE to provide presentations to seniors. In addition, LSNC worked with Adult Protective Services on two cases.

Legal Representation: 73.75

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Legal Advice/Assistance: 355.70 Community Education: 23.3 Special Outreach: 2 Total Hours: 454.7
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**PSA: 5**

**Provider: Legal Aid of the North Bay**

**Counties: Marin**

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

None Stated
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Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated
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**PSA: 6**

**California Legal Services (Title III B)**  
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Quarter: 4

Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

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

A recent case illustrates the need for more outreach and services to help educate elders about end of life planning. For instance we had a case where two seniors Mr. Chang and Mrs. Lew (not their real names) had been living together as a family unit for over 17 years. She had substantially more assets than he did. This caused some strain as Mr. Chang did not want to appear to be after her money. To that end Mr. Chang did not want their money or assets to commingle so they had separate accounts and they kept title to their property separate. Although they could have chosen to get married they felt there was no need at their advanced ages. They both were married before and each lost their spouse to illness. They each had adult children. Their focus was to live together and take care of each other like a husband and wife would. They did so for over 17 happy years. Then she had a stroke and was rushed to a hospital. Mrs. Lew was declared incapacitated by her doctor and her eldest son Bill, who held a power of attorney for his mother stepped in. Mrs. Lew had prepared some documents 25 years ago and never updated them. The first thing Bill did was restrict Mr. Chiang's visitation privileges. Mr. Chang needed permission in advance from Bill before he could visit his long time partner Mrs. Lew. Even though Mrs. Lew improved, she was not permitted to see Mr. Chang because her son was in charge now and would not allow it. Mrs. Lew became depressed and easily agitated. The assisted living facility gave her anti-anxiety medication that has severe side effects. Mrs. Lew became more depressed and her condition deteriorated. She died 7 months later alone in the assisted facility that her son sent her to. We tried unsuccessfully to arrange visitations for Mr. Chang but the assisted living facility would not entertain any of our suggestions and totally deferred to the son Bill. We have for over 15 years been providing information and legal services in the area of estate planning and end of life planning for San Francisco elders. This case and other like it have become an issue we have been working on resolving with our various partners in the elder services area. We will continue to get the word out that a few simple documents prepared in advance and routinely reviewed could have avoided much of the stress and heart break that resulted in this case.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Through our collaboration work with SOMA and other housing groups, our staff has been able to increase outreach efforts despite the reduction of funds. These include outreach to Golden Gate Training, Canon Kip, Mission YMCA, Visitation Valley, West Bay, On Lok and various other groups or events like Silver Tsunami to protest the cut backs.

We continue to host our quarterly API Elder Abuse Task Force meetings to address public benefits and end of lives issues. Our collaboration remains strong and viable.

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**Provider: Asian Law Caucus**

**Counties: San Francisco**

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

We recently won a motion for summary judgment in a post-foreclosure unlawful detainer (eviction) case. The bank was evicting an elderly Chinese couple from the house their son had previously owned but lost in foreclosure. The couple would have no where else to go, given their limited fixed income of Social Security benefits. We convinced the court that the tenancy was valid, despite the close relationship and below market rate rent such that the SF Rent Ordinance applied, in which case a landlord would need just cause to evict. The bank didn't have just cause and so was relying on invalidating the tenancy.

In another case highlight , a blue-collar Vietnamese family was served an eviction notice because the deceased owner's heirs wanted to move in. The notice and grounds for eviction were valid, but we blocked the plan by arguing that the eviction couldn't happen during the school year, since the tenant has a minor child. This is a new defense enacted through ordinance by the SF Board of Supervisors last year. As a result, we negotiated an agreement with the landlord's attorney to establish a move-out date several months later into the summer, a 3-month rent waiver, and relocation payments totaling approximately \$18,000

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**Provider: Legal Assistance to the Elderly**

**Counties: San Francisco**

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

Client is an 84 year old white male who receives SSI, is extremely hard of hearing and lives in senior housing South of Market. He was served with a summons & complaint alleging that he had breached the terms of his rental agreement on several occasions by behaving in an intimidating, threatening and offensive manner towards management. Our staff attorney, Tom Drohan negotiated a settlement agreement which allowed him to remain in his unit so long as there is no repetition of his prior behavior.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Our Executive Director, Howard Levy continues to participate on the steering committee of a statewide group of senior legal service providers convened with the assistance of the staff of the Legal Aid Association of California. This group meets via telephone conference on a regular (typically monthly) basis to discuss issues of mutual concern. On June 16th it convened a face to face meeting in San Francisco. In attendance were senior legal service providers from Northern California, along with representatives from both San Francisco HICAP and the San Francisco Long Term Care Ombudsman Program. Items on the agenda included: training & retaining volunteers; access to services for clients with limited English proficiency; the program monitoring tool being developed by the California Department of Aging & resource sharing.

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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: Spanish-speaking senior resident attended La Raza Senior Law Clinic requesting assistance in regards to a unilateral modification by the Social Security Administration of the payment plan a settlement agreement for a \$928 overpayment. The proposed monthly payment amounted 10% of his monthly income. We requested in writing a more affordable payment plan to pay off the balance of the overpayment. The Administration accepted the payment plan and the client was able to keep paying the debt off without sacrificing his modest living budget.

May Client: A Spanish-speaking monolingual senior resident came to our La Raza Senior Law Clinic seeking help with a SSI benefits case. We learned that her benefits were suspended due to an overpayment in the amount of \$5,337.69 based on the existence of a savings account. We investigated the facts and found out that the account was actually under her sister's name. The client resulted to be only the beneficiary. After several meetings we sent to the Social Security Administration a request to have the benefits reinstated because she was not ever the owner of the account. The Social Security Administration finally accepted the request and reinstated the benefits as of May 2011.

June Client: A senior resident came to La Raza Senior Law Clinic with a request from the IRS to pay \$3668 in past due taxes. We contacted the IRS and learned that the tax bill is for his work "performed" in the State of Kentucky in 2008. Our client claimed that he never worked or lived in such State so this might be a case of ID theft. We completed the necessary paperwork for ID cases such as Identity Theft Affidavit, letters to the IRS and copy of his California ID and Social Security number. The IRS quickly processed the information and concluded that the client was the victim of ID theft and cancelled the collection process.

Optional Information on  
Collaboration with Other  
Advocacy Groups

This past quarter exciting. We received OTO funding from the State via DAAS for supplies and training. With this extra funding we purchased a complete set for simultaneous interpretation including wireless headphones and master microphone. Also, we purchased a portable screen, laptop, projector and two printers to better serve our Spanish speaking-only clients during our presentations.

We did a complete presentation of our program for Day Laborers at the Day Labor Program of San Francisco. Also, in order to increase our visibility, we did a presentation at law firm in downtown San Francisco, for prospective attorney volunteers. We keep collaborating with articles and translation with the other senior legal organizations to keep the Senior Rights Bulletin circulating quarterly.

This summer we have a law student for the summer and two legal assistants to better serve our clients in San Francisco.

By time we write this report, we have been informed that the City and County of San Francisco has fully restored our budget that was temporarily once reduced due to budgetary restrictions.

PSA: 7

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**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**

**Provider: Legal Aid Society of San Mateo County**

**Counties: San Mateo**

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 9**

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Provider: Legal Assistance for Seniors

Counties: Alameda

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

Legal Assistance for Seniors (LAS) represented a seventy year-old woman petition for elder abuse restraining orders and permanent guardianship for a grandson in her care. This client was referred to LAS by the District Attorney's Victim's Witness Advocate. The client was being financially and physically abused by her daughter and son-in-law. Her daughter and son-in-law lived in her home rent-free, stole her identity and accumulated debt that threatened our client's ability to remain in her own home, and frequently got into violent fights with one another that destroyed our client's property. Our client feared for her safety and the safety of her daughter's ten year old son who lived in her home. When our client asked her daughter to leave the home, her daughter used our client's grandson as leverage to remain in the home. Our client did not know how to seek protection from her violent daughter and son-in-law without endangering herself or her grandson.

LAS filed for temporary guardianship of the minor and temporary restraining orders against the client's daughter and son-in-law. Within one week, the civil court granted temporary restraining orders against the daughter and son-in-law and the probate court appointed our client the temporary guardian of her grandson. The Alameda County sheriff removed the elder abusers from the client's home. When the abusers attempted to take the minor with them, the sheriffs informed them that the child was to remain with our client. LAS represented this client in both the elder abuse and guardianship hearings. Permanent restraining orders and a permanent guardianship order were granted. Our client's daughter and son-in-law are no longer in the home and all contact with our client is limited to peaceful communications regarding the minor. As legal guardian of her grandson, our client enrolled him in afterschool tutoring and scheduled regular therapy sessions at Children's Hospital. She has reported that she no longer lives in fear and her grandson's grades and behavior are steadily improving. Through a coordinated effort by our elder abuse and guardianship areas, LAS provided an elderly grandmother and a minor with protection, stability, and peace of mind.

Optional Information on  
Collaboration with Other  
Advocacy Groups

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

PSA: 10

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**Provider: Senior Adults Legal Assistance (SALA)**

**Counties: Santa Clara**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

For the Fourth Quarter of 2010-11, SALA provided on-site legal service intake appointments at 23 senior centers or sites in Santa Clara County. These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Barbara Lee (Milpitas) Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center (San Jose), Seven Trees Community Center (San Jose), Eastside Senior Center (San Jose), Mayfair Community Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge. For the Fourth Quarter of 2010-11, SALA attorneys also participated in the April, May, and June meetings and/or activities of the Elder Abuse Task Force of Santa Clara County. During the Quarter the SALA Supervising Attorney also participated in the public hearing held by Council on Aging on the goals and objectives for the Area Plan on Aging.

**PSA: 11**

**Provider: Council for the Spanish Speaking**

**Counties: San Joaquin**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**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)

As it has for the past 30 years, SCLS continued to help the most vulnerable seniors living in Santa Cruz and San Benito Counties with their legal problems. Clients received nearly a million dollars in financial benefits that they would not have received but for the assistance of SCLS staff. A couple of highlights include:

1. SCLS continued to expand the Fiduciary Services program. This unique service helps vulnerable seniors avoid financial abuse pro-actively by working with family, other agencies and local government to provide professional fiduciary protection to severely handicapped clients.
2. SCLS continued to work to prevent involuntary closures or conversions of mobile home parks by unscrupulous park owners. So far, SCLS has been successful at the administrative and local superior court levels and hopes to prevail at the appellate court, where the leading case on this issue is now on appeal. The outcome of this case involving Alimur Mobile home Park in Santa Cruz County will literally affect thousands of elderly mobile home park residents across the state. If our clients win, it will preserve several million dollars worth of equity in their homes. Obviously, a loss on appeal will have the opposite effect, making the stakes very high in this case.

Optional Information on Collaboration with Other Advocacy Groups

SCLS worked with California Rural Legal Assistance attorneys to persuade the local Housing Authority to change the way it treats Section 8 voucher holders who are named as a future beneficiary of the proceeds of a special needs trusts. Previously, the Housing Authority would terminate a Section 8 voucher, which is worth thousands of dollars in rent subsidies to our clients, if there was any chance that a client would receive any funds from the trust in the future. This idiotic policy ignored the clear, undisputed facts that the clients were not presently receiving any funds from the trust, had no right to demand any of the trust funds and might never receive any of the funds in the future. This collaborative effort will help many seniors and disabled poor people who find themselves in the same situation as the client involved in this case.

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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: 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

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Provider: Sarah Shena, Tulare Co. Senior Legal Servc Counties: Tulare

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

1. Training on serving LBGT Elders: This was suggested by our advocate last December, and she then helped plan the event in collaboration with the County Mental Health Department. It was attended by most of the Aging & Adult Services staff for the County of Tulare, including AAA staff. This was the first such training on this topic for that staff and was very well received.

2. Improving Cultural Competence of Marketing Materials: In collaboration with a colleague from the local aid eligibility office, our advocate arranged to have our marketing flier translated into Lao for distribution at the annual Lao New Year celebration. The flier was then distributed by the AAA Information & Assistance staff who attended the event. We are also arranging to get a better Spanish translation of the flier.

Optional Information on  
Collaboration with Other  
Advocacy Groups

1. Our advocate collaborated with Legal Services of Northern CA & Central California Legal Services to get representation for a trailer tenant facing eviction after a Trustee's sale of the property where the trailer (5/2/11).

2. Our advocate met with the Deputy District Attorney handling consumer fraud to share resources & discuss further collaboration (such as possibly sharing a booth at the County Fair).

3. Our advocate became acquainted with the managing nurse for the largest local hospice agency & began planning outreach to and training for his staff.

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

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Provider: California Indian Legal Services

Counties: Inyo & Mono

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

4th Quarter Activity:

Meeting Program Priorities: As directed by the local Inyo Mono Area Agency on Aging our senior legal services places a priority on providing Durable Power of Attorney forms, both/either financial and health care versions. During this quarter we completed eight Power of Attorney cases, one in a residential care facility, one in a nursing home and the remaining six at the office. We are also providing self education materials and samples of these important documents to our senior clients.

Case #1: An elderly couple (both in their late 80's) contacted us regarding medical debts of approximately \$11,000 that had been incurred primarily due to surgery and hospitalization of the wife on two different occasions within the last year. The remaining expenses were from medical bills that their Medicare and supplemental insurance refused to pay. Three of these debts were from hospitals and we assisted the clients in filing for charity/patient financial assistance which should resolve all of those debts. The clients were unable to successfully navigate the Medi-Cal application process. We assisted the clients with this process and were successful in obtaining no cost Medi-Cal benefits with retroactive coverage. This also included application of the Hunt V. Kizer lawsuit related benefits. Further, through our assistance we were able to negotiate reasonable payment plans on the remaining outstanding debts with the other providers.

Case #2: An 86 year old client contacted us requesting assistance regarding cessation of SSI benefits without notice. We were successful in obtaining immediate reinstatement retroactively to October 2010 for the wrongful termination of SSI benefits. This advocacy resulted in retroactive benefits paid to the client including continuation of SSI benefits for the client.

Case #3: An elderly couple contacted us for assistance with long-term medical care for the husband. The wife had cared for her husband who had been paralyzed after an accident three years ago. The wife was beginning to struggle with the high demand of his home care due to her own health issues. It was recently decided by the family and based on doctor's recommendation to place her husband in a nursing home for long-term care. Through our advocacy services we were able to successfully obtain retroactive and current Medi-Cal benefits for the long-term care of her husband. These benefits will relieve the clients from the financial burdens of long-term medical care. We are happy to report that after a few months in the nursing home, the husband's condition has improved and he has recently returned to live at home with his wife.

Optional Information on  
Collaboration with Other  
Advocacy Groups

During this quarter the IMSLP retained an active role on the local area agency on aging Advisory Council to continue to advocate for continued services in the local senior community and county services by attending bi-monthly meetings or as needed to continue the support of these vital senior services. We continue to offer support and assistance to the Area Agency on Aging through this very important council membership.

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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**      **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**

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

Fiscal Year: 2010-2011

Quarter: 4

Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

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

ICLS had a client that adopted two disabled children. The two children are considerably younger than the client. Client is concerned that since she is on Medi-Cal that Medi-Cal will make a claim against her estate and take her house and the children will not have a place to live. I researched this matter and there is an exception to the estate recovery rule. The children can continue to live there after the client dies because the children are disabled. The exception includes minor, blind, or disabled children.

Client is a 73 year old disabled senior who was concerned about Medi-cal recovery. She and her spouse had been receiving Medi-Cal benefits since they were about 55 years old and continued receiving Medi-Cal up until approximately 3 months ago when client cancelled their coverage. After client found out about Medi-Cal recovery she became fearful that her disabled daughter would have no place to live after she passed. We provided counsel and advice for her regarding Medi-Cal recovery to put her mind at ease. According to Medi-Cal recovery guidelines, if a child of the estate that they are considering collecting against is disabled, Medi-Cal will not recover from the estate as long as sufficient evidence is provided from the child to establish their disability and legal status as a child of the Medi-Cal beneficiary. We relayed this to the client coupled with instructions as to how Medi-Cal will investigate the possibility of a claim against her and her spouse's estate and the documentation that her daughter must provide to the state to exempt the estate from recovery.

In March 2011, an 81 year old senior contacted ICLS for assistance with regard to the problems he was having with his insurance company. Nationwide and the contractor hired to fix the water damage caused by a water valve leak from the refrigerator to the icemaker. The contractor repaired the leak and the wall, but claimed the type of parquet floor the client had in the kitchen was no longer manufactured. Client agreed to have the parquet floor replaced with a laminate floor, when the laminate floor began to bubble the problems started. The contractor refused to fix the problem and Nationwide was giving the client the runaround. The contractor claimed the bubbling was due to too much moisture, and the engineer hired by Nationwide claimed the moisture was coming from the backyard sprinklers. Client stopped using the sprinklers for two months but it didn't resolve the problem. With the assistance of two associates I advised the client to contact several companies experienced in installing laminate floors, inquire what would cause the laminate floor to bubble and obtain several estimates on the cost of repairing or replacing the laminate floor. We advised the client to present the estimates to Nationwide. Client informed us that Nationwide sent an adjuster to inspect the floor and determined that the laminate floor the contractor installed was of poor quality, also the adjuster informed client that the parquet floor he originally had was still being manufactured and assured the client the problem would be resolved. Client was very grateful for the assistance provided by ICLS

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

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

Fiscal Year: 2010-2011

Quarter: 4

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

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

A senior citizen came in with a telephone bill for about \$150.00. Normally her bill is around \$50.00. There were charges/items on her statement that she did not agree with. She has called the telephone company herself. However, the company did not and so she wrote them. The company did not respond. I called with the client present and was able to have all disputed charges removed.

Client was getting IHSS which is home care to help keep her in her home. Client's caretaker assisted her for 93 hours a month. The county reduced the hours to 53 stating client's condition had improved and she did not need 93 hours. Went to hearing and represented client and presented her case to ALJ showing step by step, item by item, task by task, why the client needed all her hours. Client was very happy.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

PSA: 22

Provider: Legal Aid Society of Orange County

Counties: Orange

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

We recently assisted a 76 year old client from south Orange County whose phone service was shutoff. Client had a limited low-cost plan that is no longer available from her provider. Client pays her bill by giving the provider a routing number and having them electronically bill her bank. The phone service provider claimed they had not received payment but client's bank said they never received a payment request. We helped client file a complaint with the Public Utilities Commission. The provider then restored the phone service and we are assisting the client in resolving the billing process problem.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

PSA: 23

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

**Fiscal Year: 2010-2011**

**Quarter: 4**

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**Provider: Elder Law & Advocacy**

**Counties: San Diego**

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

An 88 year old senior who was caring for her brother with severe dementia contracted with a company to provide in-home care services for him. The company stipulated in the contract that the senior would be entitled to a deposit return in the amount of \$1,050.00. This deposit would be returned to her once her brother could no longer be cared for at home. In addition to making sure her brother was placed in a facility that provided optimum care, she was since August 2010 trying to get the money back from the company. She had made several calls, written letters and she was promised a refund each time but the company failed in returning her the deposit. The attorney made a call to the company and within 1 week the senior was issued the full refund for the deposit. Client was thrilled and asked the attorney if she could make a donation. The attorney sent her a donation letter.

Optional Information on  
Collaboration with Other  
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

**PSA: 24**

**Provider: der Law & Advocacy**

**Counties: Imperial County**

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

Not Applicable the Quarter.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Not Applicable the Quarter.

**PSA: 25**

**Provider: Bet Tzedek Legal Services**

**Counties: Los Angeles City**

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 26**

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

Fiscal Year: 2010-2011

Quarter: 4

Provider: Senior Law Project, Inc.

Counties: Lake and Mendocino

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

A seller of walk-in bathtubs sold \$15,000 tubs to two of our clients. Client 1, age 96, had no savings and was just barely meeting living expenses on her fixed income. She agreed to finance the tub with monthly payments that she could not possibly afford. Client 2, received delivery of the tub but found that the tub was too small to allow her to enter and close the door. Both clients cancellation rights under the Home Solicitation Act had expired prior to contacting our office. Senior Law Project was successful in canceling both transactions and obtaining full refunds.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Senior Law Project continues to collaborate with IHSS Advisory Committees in both Lake and Mendocino Counties.  
Senior Law Project continues to collaborate with California Advocates for Nursing Home Reform and other advocacy organizations in connection with the issue of improper eviction from residential care facilities. The advocacy is focused on development of new regulations for Community Care Licensing applicable to RCFE evictions.  
Senior Law Project is collaborating with Legal Services of Northern California regarding implementation of Ukiah's new Mobilehome Rent Stabilization Ordinance. Negotiations on a challenged rent increase by a large Ukiah Mobile Home Park were recently concluded.

PSA: 27

Provider: COUNCIL ON AGING

Counties: SONOMA

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

4/2011 Assisted elderly client with Administrative Law Judge hearing preparation regarding in the amount \$2306, (client elected not to have COA represent her at the ALJ hearing) . Unfavorable decision, client is appealing the ruling utilizing our state certified LRS attorney panel.  
4/2011 Assisted another elderly client with ALJ hearing. Result was a special dismissal. No overpayment recovery required on \$9580 request

Optional Information on  
Collaboration with Other  
Advocacy Groups

5/10/2011 In honor of Older American's Month, attended Board of Supervisors meeting at the request of AAA to have a legal client speak to the Board how legal services had assisted the client with legal needs concerning a Social Security overpayment issue.

PSA: 28

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

**Fiscal Year: 2010-2011**

**Quarter: 4**

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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

The attorney who provides legal services to seniors at Legal Aid of Napa Valley is vice chair of the Napa County Commission on Aging. Through this role she was part of a coalition of agencies that recognized that there were many people going into the homes of our elderly, to provide care, who had no oversight and had no background checks (to determine prior criminal histories). This coalition drafted and then presented an ordinance that requires a permit to provide care in the home of the elderly and dependent adults. The permit requires a background check. The County of Napa and the cities and town within passed the ordinance and as of July 1, 2011, one must have a background check and a caregiver's permit to do this work.

**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.

**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**

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

Fiscal Year: 2010-2011

Quarter: 4

Provider: California Rural Legal Assistance

Counties: Stanislaus

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

None Stated

Optional Information on Collaboration with Other Advocacy Groups

4/28/2011 Attended SEAPA Core meeting approximately 10 attendees 2.25 hours  
 5/26/2011 Attended SEAPA Core meeting approximately 10 attendees 2.5 hours

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

PSA: 31

Provider: Central California Legal Services

Counties: Merced

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

Although employed, client has been struggling financially since her divorce from her husband and the death of her son a few years ago. Client's employer notified client that it would no longer participate in the 401(k) matching program starting in January 2010 and offered employees the option to withdraw their 401(k) accounts. As a result, client attempted to withdraw the balance of her 401(k) account in January 2010.

Without explanation, the company holding the 401(k) plan refused to distribute client's account. For over a year, client followed up on her request to the company with phone calls and letters. The company, however, repeatedly ignored client's requests and eventually told her not to contact them anymore.

In March 2011, attorney wrote a demand letter to the company requesting detailed instructions on distribution requirements or an explanation of why distribution is not possible. Company promptly responded and mailed attorney instructions and an application form to distribute funds. Attorney assisted client with completing forms. Employer sent forms to company via certified mail. A few weeks later, client received a check for the 401(k) balance of approximately \$4,000.

Optional Information on Collaboration with Other Advocacy Groups

None Stated

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

Fiscal Year: 2010-2011

Quarter: 4

PSA: 32

Provider: Legal Services for Seniors

Counties: Monterey

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

A Salinas resident came to see us after receiving a five-day Notice for Writ of Possession of their home which had been foreclosed upon. Our advocate Victoria Flores and I talked with the clients, finding out our 70-year client suffered from kidney failure and was undergoing four-day-a-week kidney dialysis. Our client was married with a 16-year-old daughter. Our client had owned his own home but lost it to foreclosure a few months ago; the new owners had served them with an eviction suit and won. The clients, on their own, had asked for additional time from the new owners but had been refused. Our clients were desperate for more time to move, given the husband's on-going, life-sustaining dialysis. I worked with one of our pro bono attorneys to prepare a "Motion for a Stay of Writ of Execution" which was filed with the court. As soon as the call was made to the plaintiffs letting them know we had helped the clients file this motion, the new home owners agreed to allow them extra time to move and we entered into a settlement with them for additional move-out time.

Additionally, we learned one reason the clients had not come to us sooner is that, months before we saw them, they had been drawn in by a disreputable Southern California attorney who claimed he could save their home from foreclosure. This attorney persuaded our clients to pay him \$5,000.00 up front to help "save their home from foreclosure." The attorney, of course, did nothing but take our client's money even though he promised to represent them in the unlawful detainer. This attorney's actions are clearly improper and violate various portions of the California Civil Code, especially written to address taking upfront money for mortgage foreclosure practice. Our clients are being given time to settle into their new home and then we will talk with them about the possibility of pursuing a civil action against this attorney for Financial Elder Abuse

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Services for Seniors, together with Meals on Wheels of the Salinas Valley, Meals on Wheels of the Monterey Peninsula, Alzheimer's Association, Long Term Care Ombudsman, and the Alliance on Aging continued in a multi-year collaboration to collectively promote their programs serving Monterey County seniors. This collaboration has produced a local newspaper magazine style supplement and maintains a common toll-free telephone line (2-1-1) for client referrals. Legal Services for Seniors provides staff training with these other organizations develop awareness of LSS' program and facilitate inter-program referrals.

Legal Services for Seniors is the legal arm for the Monterey County HICAP program. Referrals are made by the HICAP director to LSS. Non-legal health insurance issues encountered by LSS are referred in turn to HICAP.

Legal Services for Seniors supplies legal representation to grandparents and other seniors obtaining court ordered guardianships of minor children by referrals made by staff family services counselors at the Kinship Center Program in Monterey County.

PSA: 33

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

**Fiscal Year: 2010-2011**

**Quarter: 4**

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

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

Optional Information on Collaboration with Other Advocacy Groups