

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

**Fiscal Year: 2009-2010**

**Quarter: 2**

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**PSA: 1**

**Provider: Legal Services of Northern California**

**Counties: Humboldt & Del Norte**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 2**

**Provider: Legal Services of Northern California**

**Counties: Shasta, Siskiyou, Trinity, Modoc, Lassen**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 3**

**Provider: Legal Services of Northern California**

**Counties: Butte, Colusa, Glenn, Plumas, Tehama**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 4**

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Fiscal Year: 2009-2010

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Provider: Legal Services of Northern California

Counties: Yolo

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

Client, a 72 year old skilled nursing facility (SNF) resident with Alzheimer's who had resided at the SNF for the past six years, was served with a notice from her insurance provider that she no longer met the criteria for skilled nursing care. The insurance company concluded she was not eligible to receive coverage for her residency at the facility because her condition had improved, even though the insurance company did not have documentation from a physician supporting their position. Her family contacted Legal Services because they were concerned she would be discharged to their care and they would not be able to meet her needs at home. Legal Services appealed the insurance company's decision and obtained documentation from her treating physician substantiating her need for continued care at the SNF because of her medical condition, which had deteriorated since admission, not improved as maintained by the insurance company. Before the hearing, the insurance company's attorney contacted Legal Services and agreed to approve coverage for the client.

The client, a 66 year old male, was residing at a Mobile Home Park. He fell behind on rent for the space he occupied because his veteran's benefits were delayed. He also had a contract for purchase of the trailer in which he resides with the owner of the Mobile Home Park. He remained current on his monthly payments for purchase of the trailer. The owner served him with a notice to terminate tenancy based on his failure to pay rent. The client had no means of moving the trailer and was faced with losing both his Mobile Home Park space and the trailer. LSNC staff negotiated a settlement with the owner that enabled the client to pay off back owed rent over a 10 month period and reduced the amount owed on the trailer by half. The owner further agreed to move the trailer for the client and provide him with a good reference to facilitate his move. The client located a new Mobile Home Park in which to reside, the owner moved his trailer, and he reports he is very happy with his new location.

The client, a 62 year old disabled woman who is deaf, sought assistance from Legal Services regarding a lawsuit served on her by a collection agency arising out of alleged credit card debt in the amount of approximately \$8000. The client disputed the debt, never received confirmation of the same, but continued to receiving harassing phone calls from the debt collector threatening to take her home, all of which were recorded on her answering machine. The client was extremely concerned about the lawsuit and the possibility of a lien being placed on her home should she lose at trial. Legal Services assisted the client with the response to the complaint, discovery, and trial preparation, alleging that the collection agency did not have adequate documentation to prove they own the debt. Legal Services also drafted a cross-complaint alleging the debt collector violated the Fair Debt Collection Practices Act by continually harassing the client. At trial, the Judge suggested that the debt collector dismiss the lawsuit against the client in exchange for her dismissal of the cross-complaint. The debt collector agreed and both actions were ordered dismissed with prejudice.

Optional Information on  
Collaboration with Other  
Advocacy Groups

LSNC staff held office hours at Rural Innovations in Social Economics (RISE), a non profit agency serving low income persons in Esparto, on the first and third Wednesday of the month. LSNC staff also held office hours the second Thursday of the month in Knights Landing at the Yolo Family Resource

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Center. LSNC also held its monthly clinic at the West Sacramento Senior Center on the second Monday of the month. In addition, LSNC staff collaborated with RISE and the West Sacramento Senior Center to provide workshops for seniors on the new changes to Medicare Part D.

Legal Representation: 133.6  
 Legal Advice/Assistance: 57  
 Community Education: 7.5  
 Special Outreach: 3.2  
 Total Hours: 201.

**Provider: Sacramento Senior Legal Services**

**Counties: Sacramento**

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

After a long mediation process, a client finally received a nursing certificate that he had been denied in an alleged instance of age discrimination after he had excelled in the private school class.

Housing advocate David Madriz successfully defeated an eviction attempt that occurred because the manager held a grudge against the client's son, who had formerly been employed there.

A condominium owner realized that the general lighting and other power usage for the whole building had been appearing on her electric bill for many years. The management company and board stonewalled, as the majority of residents actually benefited from the unfair allocation. Persistence by summer law intern and paralegal Kim Bovee eventually got the city building inspectors to red tag the building, forcing the association to fix the situation.

Optional Information on  
 Collaboration with Other  
 Advocacy Groups

Supervising attorney David Mandel and paralegal David Madriz traveled to Washington and Philadelphia in October, first to speak with officials at the Administration on Aging and congressional staff about national support for senior legal hotlines, then to attend the annual meeting of the National Association of Senior Legal Hotlines, in conjunction with the National Consumer Law Center conference, where David Mandel made two presentations – about housing issues that affect seniors' ability to age in place and about reverse mortgages.

David, along with new staff attorney Michelle Satterlee, has been busy communicating with the Legal Aid Association of California, the Department of Aging, the State Bar, a sociologist and others on our Model Approaches project. It aims to make major progress over the next three years to improve statewide coordination of senior legal services. The first large meeting has been scheduled for June.

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**Provider: Yuba Sutter Legal Center**

**Counties: Yuba and Sutter**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

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Provider: Legal Services of Northern California

Counties: Nevada, Placer, Sierra

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

October 2009

- Mother Lode Regional Office (IULRO) staff assisted several seniors at risk of losing their housing due to recent economic hardships.  
- MERO staff assists limited English speaking seniors with their questions about the reduction or loss of their public benefits. In one case, the senior was notified that his MediCare benefits were being terminated but he could not understand the Notice which was in English. In addition, after three bus transfers and a fairly long walk to the county welfare office, the senior man told he was in the wrong agency, but was given no other information about where he might find the answers to his questions. MLRO was able to contact the appropriate agency and clarify that the Notice was incorrect and that the senior would continue to receive his Medicare benefits.  
- MLRO staff handled numerous calls for information and assistance with responding to credit card interest rate increases.

November 2009

Mr. G contacted this office in May 2009 with questions about how to stop his son from taking his money and how to get back the money that was already taken. Mr. G. told LSNC that he had only his Social Security Retirement income left and maybe \$4,000 in assets. He had reported his problem to local law enforcement and to his bank but nothing seemed to be happening to stop his son from continuing to clean-out his life savings. Mr. G. was afraid that his son would get what little he had left. Mr. G told our advocate that he had already been forced to move into an apartment with a friend while he sought answers to his plight. As we learned during our investigation into his situation, Mr. G had not misstated his current income or assets - his savings had been cleaned out by his son, his financial documents stolen and his pension redirected. In desperation, Mr. G had threatened his son. His son filed a restraining order forcing Mr. G. to leave his own home for at least six months. With the assistance of the Mother Lode Regional Office, Mr. G. regained control of his monthly pension and removed his son as his agent under a previous Power of Attorney. LSNC recommended that Mr. G change his accounts and his bank immediately to further ensure that his funds were not accessed by his son. After Mr. G's son violated a court order to produce Mr. G's personal documents, LSNC staff worked with Victim Services and law enforcement to locate Mr. G's financial and estate planning documents by other means.

A friend and relatives began helping Mr. G. by taking him to his appointments, to the bank and to the police department to assist in the investigation of the case against his son. Despite the support of his relatives and his friend, Mr. G fell down at the apartment where he lived while his case was being investigated by law enforcement. Mr. G was hospitalized with multiple injuries and then transferred to a skilled nursing facility (SNF). The SNF discharged Mr. G prematurely without a plan of care and he subsequently fell again. He was re-hospitalized and transferred to the same SNF. The SNF again attempted to discharge him again quickly and without an adequate plan of care. LSNC received a desperate call from Mr. G's family asking for help on his behalf. LSNC provided information to Mr. G and his family so that they could immediately appeal the discharge. Mr. G was able to remain in the

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Optional Information on  
Collaboration with Other  
Advocacy Groups

SNF until a plan for his care was established. The extra time in the SNF allowed Mr. G's family to prepare a suitable living environment in their home for Mr. G. after he left the SNF. He did not have to return to the apartment.

December 2009

Mother Lode Regional advocates provided information to a Sierra County social worker who was working with a senior to prevent her eviction from her apartment while she was in a skilled nursing facility. After being admitted to a hospital and then to a skilled nursing facility the senior was unable to access her bank account and pay her bills on time. She received a Three Day Pay or Quit Notice from her landlord. LSNC provided information to the social worker and the senior about the senior's rights and how she might resolve the issue of accessing her bank account in order to pay her rent. LSNC offered to contact the landlord on behalf of the senior if the landlord refused to accommodate the senior's situation.

October 2009

- Staff provided information assistance to Placer APS regarding the rights of a senior landlord who maybe at risk of abuse by her lodger.
- Staff coordinated and participated in legal trainings provided by private members of the California State Bar and the Placer County District Attorney's office on current issues in Elder and Criminal Law.
- The Nevada City office staff is working with the Loyalton Senior Center staff and other agencies to assist a victim of elder abuse in Sierra County.
- The Auburn office staff provided information and materials in a presentation for the Sierra County Parkinson's Support Group in Loyalton. Individuals were encouraged to contact LSNC for follow-up questions about their individual situations.

November 2009

- Advocates provided information assistance to Placer APS regarding the rights of a senior landlord who was the victim of theft by his chore-worker. The senior was then referred to LSNC for further advice and assistance as necessary.
- Advocates provided information to a housing social worker who is assisting a disabled senior with her request for accommodation.
- Advocates worked with an elderly victim of domestic violence, local Adult Protective Services and Victim Services staff. The victim needed information about properly accessing accounts she shared with her alleged abuser so that she could pay her space rent and other obligations.

December 2009

-None to report

PSA: 5

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Provider: Legal Aid of the North Bay

Counties: Marin County

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

#1: Client, a 60 year old disabled Marin resident on a fixed income, came to Legal Aid of Marin (LAM) for assistance in obtaining a refund from her chiropractor. She had prepaid for a course of treatment that she ultimately decided to cancel because of the high cost and the doctor's rudeness. Her request for a refund had already been rejected when she met with LAM staff at the Marin Community Clinic in San Rafael. LAM drafted a letter demanding full return of her prepayment that was cc'ed to the Board of Chiropractic Examiners. The doctor initially responded that an agreement precluded any reimbursement. After a follow-up email from the client (drafted again by LAM), he refunded her money (less \$44). The client was very grateful to receive the money she needed for her daily living expenses.

#2: George J. (57 hours) had several Senior Legal Aid appointments with a dear lady of 80 years. She lost her husband four years ago, and now wishes to move to Petaluma to be near her daughter, one of two children. She still has her health, but knows she no longer will be able to maintain the large family residence in Marin. Her questions ran the gamut. George had the client make a budget of her anticipated expenses. They compared both anticipated net rental income and net investment income with her probable expenses. Expenses were projected for both a purchase of a new home and for the rental of a house or apartment. George discussed the cost of a property management firm to rent the Marin house. They discussed the concept of stepped up income basis in the home after her husband died. He had to find out if the house had been held in joint tenancy or community property. The home had been held as CP inside the family revocable Trust, so a double step up in tax basis was allowed. An opinion of value letter at her husband's DOD is needed. The family attorney had recorded an Affidavit of Death. They discussed whether any cash going to her Petaluma daughter is meant to be compensation or to be a gift and whether she must equalize for her other child, by amending the family Trust distribution provisions. They discussed the financial pros and cons, as well as the practical pros and cons, of buying a new Petaluma home or renting as well as discussing living in a senior retirement center.

#3: Representatives from Farella Braun + Martel (FBM) assisted a couple who provided virtually uncompensated 24/7 care for several years to his mother in her mobile home until she died. After his mother's death, the client's sister and the children of the mother's long pre-deceased husband, wanted to throw our clients out of the mobile home, wanted the mobile home back, and wanted our clients to pay rent for the time they had taken care of the mother. The testamentary documents that the mother and her deceased husband had done were hopelessly and incompetently drafted, adding another challenge to the representation. Over the course of several months, a number of contested pleadings and one deposition of the original drafting attorney, FBM reps worked out a settlement with the client's sister and step-siblings through the Marin Superior Court mandatory settlement conference system, to give our clients the mobile home.

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Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 6**

**Provider: Legal Assistance to the Elderly**

**Counties: San Francisco**

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

Client, a 62 year old Hispanic man who earns \$1,200 per month as a hotel worker, was served with a summons and complaint alleging that he owed almost \$4,000 from an unpaid loan. Client did not dispute the loan, but believed that he had already paid the loan off. Legal Assistance to the Elderly initially prepared a pro per response and discovery for the client and our attorney substituted in shortly before the trial. The case was dismissed at the request of plaintiff's counsel.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We continue to work closely with the Eviction Defense Collaborative, which is located in our building, one floor below our offices. This organization assists self-represented tenants facing eviction by preparing pro per documents for them to file. We refer clients to them for their services, particularly tenants facing eviction for non-payment of rent, who do not have rent money. They refer elderly clients to us, who they believe would benefit by our representation. Our staff also consults with their staff, and vice versa, on housing related issues.

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Provider: Asian Law Caucus

Counties: San Francisco

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

We raised the issue of unfair treatment of citizenship applicants with disabilities who were requesting permission to use an interpreter at their interview. In August, almost all such requests were being rejected, even when they clearly met the USCIS' national guidelines. After raising the issue with USCIS' San Francisco Field Office Director, the handling of these requests has improved greatly. Our last four disability waiver requests were all accepted as meeting the guidelines.

After much effort, we successfully demonstrated that USCIS wrongly denied our 65-year-old client's citizenship application without interviewing her. USCIS claimed that she had been sent a fingerprinting appointment and had denied her application for failure to attend the appointment. She was upset that after taking her \$675 application fee, USCIS did not even interview her. After we intervened three times, USCIS finally agreed to reopen her citizenship application and interview her.

The following paragraph is an example of the other work (other than Senior Law) that ALC is involved in:

The Asian Law Caucus was a plaintiff in a successful lawsuit challenging the involuntary transfers of immigrants being held in detention facilities. Immigrant detainees are often transferred out of California to Arizona, Texas and Hawaii and become isolated from family, friends and legal resources. Governor Arnold Schwarzenegger issued an emergency proclamation declaring a state of emergency in California's prison system in a failed attempt to alleviate overcrowding. Bypassing the rule of law, the Governor declared that immigrant inmates would be the first to be transferred out of state and did so without their consent. A lawsuit was brought against the California Department of Corrections and Rehabilitation to ensure that CDCR comply with the Administrative Procedures Act and issue regulations governing out of state transfers. In April 2009, CDCR issued regulations requiring that immigrant inmates be given a process to appeal and challenge their involuntary transfers.

Optional Information on  
Collaboration with Other  
Advocacy Groups

The following paragraph is an example of the other work (other than Senior Law) that ALC is involved in:

Anchoring a broad-based coalition of immigrant rights organizations in the San Francisco Bay Area, the Asian Law Caucus successfully waged a campaign to win passage of an ordinance aimed at restoring the due process rights of immigrant youth who were being improperly referred to federal immigration authorities without any legal review by a judge. These efforts helped to turn the tide of anti-immigrant press coverage that predominated the media and resulted in greater pro-immigrant messages in news coverage of the issue.

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Provider: La Raza Centro Legal, Inc.

Counties: San Francisco

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

Case Summary: A October 2009

We were successful in assisting our elderly monolingual client on a fixed income in winning a judgment from his former landlord for the return of his security deposit plus penalties for violation of tenant rights. Client waited for his judgment to no avail, we then assisted in addressing his former landlord demanding that she complies by the judgment. Landlord sent her son to harass our client and our organization; however, in the end we were very successful in collecting his judgment.

Case Summary: B November 2009

Elderly monolingual client on a fixed income attended our On-Lok clinic at an off-site Senior Center. Client had hired two-brothers, fluent in Spanish who advertised themselves as contractors. She paid half the money for the job and the contractors immediately began working on her home. Not before long these contractors disappeared, we assisted our client in filing a small claims action and she won her judgment. We are currently in the process of helping her collect her judgment.

Case Summary: C December 2009

Elderly monolingual client received a collection notice for a suit filing against him for a debt of \$10,099. We informed, debt collectors that they had a right to sue senior, however, they would not be successful in collecting their judgment because of his fixed income. Senior is protected by Federal and State law, which prohibits certain creditors from enforcing judgments against beneficiaries of his social security and SSI. We then assisted him in the filings of the appropriate court documents to ensure that his income was not garnished in violation of state and federal codes. After several arbitration dates and advocating on behalf of our client, the action was dismissed.

Optional Information on  
Collaboration with Other  
Advocacy Groups

This second quarter of the Fiscal Year 09-10, we have continued and increased the visibility of our Agency and Senior Law Unit by attending network meetings, community events, and senior gatherings which directly affect and assist our senior community. By attending network meetings that impact our senior community; such as IHSS Task Force we are sending the message to our local government that we are not only concerned but that we are standing by our senior community as they struggle through these economic times.

We as an organization and program feel the impact of the budget cuts, as a result of this crisis; we are seeing an increase of issues/concerns that a sole client is facing as well as an elevated frustration in their demeanors. This increase in demand has weighed heavily on our Senior Law Unit as we strive to provide efficient yet effective legal services. To maintain afloat, we have turned to the assistance of interns and volunteers from the local community colleges to meet the increased demand.

We continue to distribute the winter 2009 Senior Rights Bulletin and we look forward to writing our next article and having it published by the third quarter. We continue to maintain a healthy relationship with the agencies in our DAAS partnership; Asian Law Caucus, Asian Pacific Islander Legal Outreach, and

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Legal Assistance to the Elderly and are grateful for their support. In addition, through the Legal Aid Association of California we have continued to take advantage of free cost webinars as well as continue taking advantage of the senior legal services list serve where we have had the opportunity to make allies with other senior legal service organizations but also make our program and organization visible statewide.

Finally, we continue to be enthusiastic about attending the District Attorney Council/ Latino Partnership Collaborative meetings because we learn of the concerns and efforts taking place in our local district as well as obtain knowledgeable information about specific local senior service providers.

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Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

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

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

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

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

An example:

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

Interest is 20%+

Over credit limit fee \$39

Late fee \$39

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

The contract outlines these fees and the issuing of the card may not rise to the level of abuse, but it can cause problems and abusive problems for seniors when they incur a debt they cannot handle. Our office has been successful in assisting the senior in navigating through these problems and resolving it. These are just one of possible many problems that come with being limited in English or resources. Especially at this economy time, the senior becomes a greater prey when their financial situation becomes more desperate.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Since our last quarter report, API Legal Outreach continues to work collaboratively with other community based organizations on the California's budget short fall that targets In-Home Supportive Service (IHHS) in providing information about the reduction and any legal representation in the appeals process.

In addition, API Legal Outreach is also part of the San Francisco's Mayor's Long Term Council. We attend monthly meeting to share and strengthen our collaboration with each other. We continue to be informed about how the possible cut backs may affect various issues that may impact our clients in various ways, including housing, meals, transportation, healthcare and legal services.

API Legal Outreach is also a part of the API Partnership that speaks to collaboration at service levels with regards to our funding and the impact of it to API communities and how to respond to it.

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Finally, we are also part of a legal best practice non-profit group that discuss our general legal services in San Francisco and discuss how we can ensure that SF continues to have viable legal representation in various Senior Legal Services. This includes Legal Assistance to the Elderly, La Raza Centro Legal, and Asian Law Caucus.

**PSA: 7**

**Provider: Contra Costa Senior Legal Services**

**Counties: Contra Costa**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 8**

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

**Counties: San Mateo**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 9**

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Provider: Legal Assistance for Seniors

Counties: Alameda

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

LAS' staff assisted a 74-year-old man receiving SSI who was improperly removed from a program that pays the Medicare hospital insurance premiums of low-income beneficiaries. The client's termination of participation in the program was due to an administrative error and was not due to any fault of his own. The client then started receiving bills for his hospital insurance for \$465 a month. As an SSI beneficiary, he could not afford to pay this amount and so he did not pay the bills. After a couple of months, his hospital insurance was cancelled for nonpayment of premium and the client was left with no insurance coverage. The client became very concerned about this situation and came to LAS seeking assistance in addressing the problem.

Legal Assistance for Seniors appealed the termination of the client's participation in the program to an Administrative Law Judge, submitted a brief arguing that the termination was erroneous, and appeared with the client at his hearing. After hearing the arguments and reviewing the brief, the judge issued an order directing the government to process the client's benefits. The client is now reinstated to the premium-payment program and receives his full health insurance benefits again.

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 has been awarded contracts by 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**

**Counties: Santa Clara**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

For the Second Quarter of 2009-10, SALA provided on-site legal service intake appointments at 23 senior centers or community sites in Santa Clara County. These sites included: Palo Alto Senior Center, Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (in San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in downtown San Jose), St. James Senior Center (in San Jose), Alma Senior Center (in San Jose), Lola Williams Senior Center (in San Jose), Eastside Senior Center (in San Jose), Hank Lopez Senior Center (in San Jose), Campbell Adult Center, Willows Senior Center in San Jose, Kirk Senior Center (in San Jose), Almaden Senior Center (in San Jose), Evergreen Senior Center (in San Jose), Southside Senior center (in San Jose), CRC Senior Center (in 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 Second Quarter of 2009-10, SALA attorneys also participated in two October meetings of the Elder Abuse Task Force of Santa Clara County. SALA attorneys also continued to work collaboratively with APS in individual cases for clients that are victims of elder abuse.

**Provider: Fair Housing Law Project**

**Counties: Santa Clara**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

85 year old blind man with dementia was convinced to take out a refinance loan on his property. After filing a federal lawsuit on his behalf, FHLP was able to negotiate a \$225,000 principal pay-down of his mortgage and lowered his interest rate to a 5% fixed rate, plus \$40,000 in damages.

**PSA: 11**

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**Provider: Council for the Spanish Speaking**

**Counties: San Joaquin**

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

On December 28, SLS had a client come in because she had been defrauded by a solicitor and her bank account as charged \$383.96. The client was very sad and stressed out as she is on a limited income. Unfortunately, the client provided her account number for "identification purposes;" at no point was she informed her account would be charged. SLS assisted client in calling her bank and speaking with the fraud department. After the client relayed her story to the agent, she was informed her account would be credited and a new account was issued. The client was very happy and satisfied with the service.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 12**

**Provider: Catholic Charities**

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

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 13**

**Provider: Senior Citizens Legal Services**

**Counties: Santa Cruz and San Benito County**

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

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

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

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**Provider: Central California Legal Services**

**Counties: Fresno, Madera**

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

1.Senior client facing eviction: Central California Legal Services (CCLS) answered an unlawful detainer lawsuit and negotiated a settlement in which the client received over \$12,000.00, with the agreement that the client would drop the lawsuit against the landlord and vacate the premises.

2.Senior unable to get dentures: Due to changes in Medi-Cal dental coverage, a senior was left high and dry after having teeth extracted in preparation for dentures. Before the denture service could be completed, Medi-Cal stopped providing this type of coverage. With the senior facing a lengthy administrative appeals process and possible litigation, CCLS contributed to a news feature highlighting the problem hoping to bring public attention to the problem. As a result, an anonymous donor offered to pay for the senior's dentures. (Note: while this doesn't resolve the Medi-Cal dental coverage problem for our clients, it does demonstrate CCLS's willingness to explore all avenues in an effort to assist a client.)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 15**

**Provider: Central CA Legal Services Inc**

**Counties: Kings**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**Provider: Sarah Shena**

**Counties: Tulare**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 16**

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

**Fiscal Year: 2009-2010**

**Quarter: 2**

**Provider: California Indian Legal Services**

**Counties: Inyo & Mono**

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

2nd Quarter Activity:

Case#1: Client became very ill and entered the hospital from the skilled nursing facility the client was living. The client's hospitalization prompted the concern for potential long-term care financing. The client's son/agent under power of attorney requested assistance for ailing client. We were able to confirm for the family that the client's IRA accounts would not disqualify client in the event Medi-Cal long-term care benefits were needed. The client's family was very relieved.

Case #2: Client requested help with a consumer problem related to a contract dispute with a TV company. The TV company extended the client's contract another 6 months which is not what the client agreed to. The extension language was added to a work order. The client contacted the TV company and the TV Company stated that was the new termination date for the client's contract. The client was adversely affected by the commitment of an added expense. The contract per SLP attorney was valid and showed a termination date of an additional 6 months to June 2010; however, research showed that this company had a court wage a judgment against them for unfair and deceitful business practices. The client returned with a tape of the company representative agreeing to the original 12/31/09 termination date.

Case #3: Client recently separated from husband and was left with all the debts totaling about \$50,000 and the client's income was reduced by more than half. The client was given information and advice about legal separation and dissolution (divorce). The client was also given information for assistance for heating costs through local LIHEAP project.

Optional Information on  
Collaboration with Other  
Advocacy Groups

IMSLP retains an active role on the local area agency on aging Advisory Council and a local grassroots senior services group known as the Frail and Elderly Taskforce. HICAP and the Ombudsman are regular contacts for updates or discussions of state budget and program services.

**PSA: 17**

**Provider: Central Coast Commission for Senior Citizen**   **Counties: San Luis Obispo and Santa Barbara**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 18**

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

**Fiscal Year: 2009-2010**

**Quarter: 2**

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**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

**Provider: Center for Health Care Rights**

**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: 2009-2010**

**Quarter: 2**

**Provider: Inland Counties Legal Services, Inc.**

**Counties: San Bernardino**

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

Senior client has a \$580 per month Share of Cost under the Medi-Cal Program. She is over the income limit for the Aged and Disabled Federal Poverty Level Program by \$47. The County then determined that she had a Share of Cost. ICLS was able to explain to her that if she obtained a dental or vision plan for approximately \$50 per month, she would then be able to receive a zero Share of Cost Medi-Cal plan. Her Share of Cost was \$580 per month. By paying the \$50 per month for a dental or vision plan, she was now saving \$530 per month.

In September, client requested the services of ICLS because she had so much credit card debt, and could no longer afford to pay. She began receiving collection calls after her creditors refused to work with her when she fell behind on her payments. Client stated that she was forced to juggle bills around every month; sometimes she didn't have enough to go grocery shopping. Client was interested in receiving advice regarding bankruptcy, which she felt was her only option. ICLS advised client that her Social Security and SSI were both exempt from enforcement of judgments, because they were protected by both Federal and State statutes. ICLS advised client that if she could not afford to pay them, she didn't have to, and she didn't need to file bankruptcy, provided that none of the outstanding amounts were used to pay for anything government related such as student loans, taxes, or overpayments on Social Security, SSI, etc.. Client broke into tears, she could not believe what ICLS was telling her. Finally she would be able to go grocery shopping without worrying. Client was grateful.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 21**

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

Fiscal Year: 2009-2010

Quarter: 2

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

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

Client's in-home supportive services (IHSS) were cut from 72.8 to 42.4 hours. We went to a hearing. Claimant, and her two daughters and claimant's IP which is her grandson, testified. Present for the County was the IHSS worker and the appeals representative. Hearing was a bit more combative than advocate thought it would be. The social worker insisted that she had tested the claimant for alertness, etc.. Advocate cross examined the social worker and went into specifics such as, what did you ask when you were testing her mental capacity? What were the answers? Why is it not in your report? And did you test her cognitive abilities and find any deficiencies in alternating attention? Conceptual reasoning? Deductive logic? Etc.. Claimant's daughters and grandson (IP worker) testified as to what a danger client is to herself, that she is not self-directing, and is unable to be left unsupervised, etc.. That she needs help with her meals, cleaning, ambulating, etc.. Advocate gave the Administrative Law Judge a hearing memo and did a closing argument. ALJ ruled in our favor and the client was awarded 81.8 hours of IHSS.

Client is a senior with a seriously ill senior husband and a 15 year old child. The husband suddenly became ill and their whole lives have turned upside down. The clients lost their home to foreclosure and were living with relatives. Clients were borrowing money from their relatives to get food, etc.. Client went and applied for food stamps. Client was denied because the Dept. of Social Services counted money from a loan against the clients. Advocate represented client at hearing. Pursuant to the regulations, you cannot count loan money as part of income. County stipulated on the record that the client was entitled to food stamps. In addition, advised client they could get cash aid and Medi-Cal for the whole family. Advised clients that after they get Medi-Cal to then go and apply for SSI at Social Security Administration for the husband. Client went down and applied for cash aid and Medi-Cal and was approved. Clients were very happy.

Optional Information on  
Collaboration with Other  
Advocacy Groups

PSA: 22

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

**Fiscal Year: 2009-2010**

**Quarter: 2**

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**Provider: Legal Aid Society of Orange County**

**Counties: Orange County**

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

We recently represented a client who would be considered "hoarder." She had received a notice from Code Enforcement that Code violations may exist and the home may be uninhabitable. The client had lived in the home for about 22 years. The home had been damaged in some of the fires several months earlier. We worked with Adult Protective Services, Orange County Mental Health and a clutter removal company to clean and improve the home, pass an inspection and allow the client to continue living in her home.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We are continuing our participation with the Fiduciary Abuse Specialist Team (F.A.S.T.) in Orange County. We also recently worked with a domestic violence prevention program in obtaining an Elder Abuse TRO.

**PSA: 23**

**Provider: Elder Law and Advocacy**

**Counties: San Diego**

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

A client was unwittingly coerced to purchase Mobile Home two days after her husband passed away. She paid \$8471.00 towards the Mobile Home. She was wondering if there was anything we could do. There was never a signed contract between the couple and seller. The original agreement involved both the husband and wife. When the Staff Attorney discovered this, she wrote to the seller/conflict. She informed her that "sometimes a contract can be lawfully discharged in the event of non-performance, but only under certain conditions. One condition occurs when circumstances have changed such that performance of the contract becomes impossible, such as death of one of the parties. Another condition, known as commercial impracticability, occurs in situations where unforeseen events have taken place which render fulfillment of the contract very expensive or impractical. See: Luminous Neon, Inc. v. Parscale, p.34. She also informed the seller about the client being a senior and according to Civil Code Section 1761(f), and as such, any judgment in her favor may be tripled as well as punitive damages awarded, Civil Code Section 3345(b).

The client received the full amount in the form of a cashier's check. Needless to say she was overjoyed!

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 24**

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

**Fiscal Year: 2009-2010**

**Quarter: 2**

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**Provider: Elder Law & Advocacy**

**Counties: Imperial**

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

Nor Applicable for the Period of 10/1/09 -- 12/31/09

Optional Information on  
Collaboration with Other  
Advocacy Groups

Nor Applicable for the Period of 10/1/09 -- 12/31/09

**PSA: 25**

**Provider: Bet Tzedek Legal Services**

**Counties: Los Angeles City**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 26**

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

**Fiscal Year: 2009-2010**

**Quarter: 2**

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**Provider: Senior Law Project**

**Counties: Lake and Mendocino**

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

Senior Law Project successfully defended an elderly/disabled client from eviction in a case involving physical abuse by a live-in caregiver. The landlord's eviction action was based on the criminal conduct of the caregiver. Senior Law Project obtained dismissal of that action and a retroactive adjustment of our client's rent obligation.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Senior Law Project Attorney collaborated with the Lake and Mendocino Foreclosure Prevention Coalition in presenting public forums on housing preservation in both Ukiah and Lakeport. The Senior Law Project Attorney presented on the issue of "The Foreclosure Process."  
Senior Law Project has entered into a negotiated contract to provide legal support to HUD certified foreclosure prevention counselors at California Human Development Corporation and has stated to receive referrals.  
Senior Law Project continues to collaborate with IHSS Advisory Committees in both Lake and Mendocino Counties. Senior Law Project will play an active role in assisting those committees to establish goals and priorities for the coming year.  
Senior Law Project continues to collaborate with California Advocates for Nursing Home Reform and other advocacy organizations in connection with the issue of improper eviction from residential care facilities. The advocacy is focused on development of new regulations for Community Care Licensing applicable to RCFE evictions.

**PSA: 27**

**Provider: Council on Aging**

**Counties: Sonoma**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

10/5/09, 11/2/09, 12/7/09: Attend planning meetings for Elder Protection Court under direction of Judge Arnold Rosenfield, along with Sonoma County representatives for Elder issues (i.e. APS, AAA, Sonoma County Judiciary, DA & PD offices) to see how Elder Protection Court functions and to determine how the program would function in Sonoma County.

11/20/09: Annual Sonoma County Bar Association Pro-Bono Awards luncheon recognizing legal volunteers throughout the legal community, networking and providing information about COA to approximately 200 people.

**PSA: 28**

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

**Fiscal Year: 2009-2010**

**Quarter: 2**

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**Provider: Legal Services of Northern California**

**Counties: Solano**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

Continued collaboration with Ombudsman Service of Northern California and Senior Legal Hotline. Continued participation in FAST, Solano Senior Coalition, and Vallejo Senior Roundtable.
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**Provider: Legal Aid of Napa Valley**

**Counties: Napa**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 29**

**Provider: Senior Legal Services**

**Counties: El Dorado**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 30**

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

**Fiscal Year: 2009-2010**

**Quarter: 2**

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**Provider: California Rural Legal Assistance**

**Counties: Stanislaus**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

11/4/09 Attended STOAAC meeting -- Estimate 50 attendees

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

12/9/09 Attended SEAPA Core meeting

The Stanislaus Elder Abuse Prevention Alliance is comprised of staff and representatives from the Long Term Care Ombudsman Program, the AAA, law enforcement, the county prosecutor's office, and local clergy members. The Senior Law Project staff attorney attends these meetings to maintain his contacts with these various organizations, thereby supporting the efforts 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 cities and 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)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 32**

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

**Fiscal Year: 2009-2010**

**Quarter: 2**

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**Provider: Legal Services for Seniors**

**Counties: Monterey**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 33**

**Provider: Greater Bakersfield Legal Assistance, Inc.**

**Counties: Kern**

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

Optional Information on  
Collaboration with Other  
Advocacy Groups