

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

Fiscal Year: 2009-2010

Quarter: 4

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, Modoc, Trinity and 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

Quarter: 4

Provider: Legal Services of Northern California

Counties: Nevada, Placer, Sierra

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

May 2010

• When a Sierra County resident took over caring for her older, mentally disabled brother, she soon found herself immersed in the often confusing world of Social Security and its many rules. GR who had always lived with his mother and who had never worked, had been an SSI recipient for many years, the consequence of a severe childhood illness that had resulted in significant neurological and cognitive deficits. At the urging of local SSA District Office staff, GR's sister researched family records in an effort to find documentation that proved GR had become disabled and a child and was therefore eligible for Social Security dependents' benefits as an adult on his late father's earnings record. The search proved successful: a 1960 school census report was found that identified GR as a "handicapped" child. GR's sister took an officially certified copy of the old government document to SSA, who then opined that the record was not good enough proof of GR's long-standing disabilities.

Understandably frustrated, GR's sister contacted the LSNC/Motherlode Regional Office where law students, still freshly familiar with the Federal Rules of Evidence, researched the issue of the 1960 documents. It qualified as a self-authenticating "ancient" public record. This document was submitted to SSA/ODAR along with a declaration that GR's sister prepared describing her recollections from her mother's story about the severe fever that left an active toddler so disabled that he has to learn to walk and feed himself again: describing their childhood with GR's younger sister as her older brother's fierce protector; and describing GR's current living arrangements within her supportive family environment. SSA/ODAR issued a favorable on-the-record decision granting GR's SSD claim. The expected retroactive payment will allow GR's sister to pay down on a second mortgage that was taken out to build GR's studio apartment on top of the garage. It has significantly increased GR's monthly income and made him eligible for both Medi-Care and Food Stamp/SNAP assistance

Optional Information on
Collaboration with Other
Advocacy Groups

April 2010

Staff coordinated legal and long-term-care services with the Long Term Care Ombudsman for a senior in a residential care facility who was deprived visitation with his family.

Staff provided legal services for a disabled veteran after he discovered that his agent-in-fact under a power of attorney had misinformed him of his eligibility for and receipt of veteran's benefits.

Staff continue to participate in multi-disciplinary financial elder and dependent adult teams in several counties.

Staff provided information to two tenants' associations regarding their right to gather information and then disseminate that information to members of the association and other tenants. LSNC agreed to provide additional outreach and information to these associations at the written request of their respective tenant boards.

Staff routinely answer calls from individual members of community service organizations who have

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general questions about senior housing, conservatorships, and income maintenance (public benefits).

Staff continue to participate in the Homeless Prevention and Rapid Rehousing Programs in Placer and Nevada Counties which assists seniors and other tenants who may be at risk of losing their rental housing.

May 2010
Staff provided information assistance to Placer APS regarding the rights of a senior who had documents authorizing conflicting surrogate decision makers.

Staff coordinated with a Visiting Nurse Association medical/social worker after a homebound senior's husband and caregiver suddenly passed away leaving her with no surrogate decision maker. The senior is bed bound and unable to speak but can understand her needs and can communicate her wishes using alternate methods. LSNC assisted the senior with documenting her choices for a new agent under a Durable Power of Attorney and her Advanced Health Care Directive. LSNC was able to provide information to her new agent-in-fact about potential health insurance options and how to start the process of Trust administration for the senior's deceased husband's estate.

Staff continue to work with Placer and Nevada County non-profit agencies and government agencies on the Homeless Prevention and Rapid Rehousing program.

Staff continue to participate in multi-disciplinary financial elder and dependent adult teams in several counties.

June 2010
Staff is coordinating with local Social Security Administration officials to provide information about SSA programs to Adult Protection Services, Victim Services and other providers of government service providers. The presentation was requested by local government providers to help them serve seniors who do not understand or cannot access benefits without assistance or who may have been the victim of identity theft or another crime.

Seniors First Information and Assistance requested LSNC's assistance in developing a flyer which provides some guidance on what first steps should be taken when a loved-one or friend passes away.

Staff continue to work with Placer and Nevada County non-profit agencies and government agencies on the Homeless Prevention and Rapid Re-housing program.

Staff continue to participate in multi-disciplinary financial elder and dependent adult teams in several counties.

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Provider: Sacramento Senior Legal Services

Counties: Sacramento

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

A disabled 69-year-old was told he would be losing his SSI because of an alleged overpayment from six years before, when some one-time income might have rendered him ineligible. Volunteer attorney Spojmie Nasiri determined that the client had a good case for waiver of the overpayment – he had duly reported the income and it would create him great hardship to lose SSI now – and advised him on how to appeal his initial denial. He followed her instructions and was successful. The assurance of stable but modest income enabled him to move into a senior apartment for which he had been waiting a long time and feared he would have to forgo.

Kinship caregiver cases can get complex, with the label “grandparent rights” an oversimplification. A senior couple had adopted their two minor great nephews and were faced with a court petition for visitation filed by the boys’ biological grandmother. The petitioner’s daughter, the boys’ biological mother, had her parental rights terminated by the juvenile court in the course of the adoption. Normally that termination would extend to the grandmother, but in this case, she was also the adoptive mother’s sister, and thus legally an adoptive aunt. Thus the court considered her case. Extensively coached by an SSLS law student, supervised by since-retired staff attorney Kathy Kelly, the adoptive parents successfully convinced the court that it would not be in the children’s best interests to allow visitation by the petitioner under the circumstances.

A 71-year-old contacted the hotline for help disputing a debt. Like many seniors who call, he pays his bills on time and desperately wants to do the right thing, which made him a perfect target for scammers. He was also very forgetful, which made it hard for him to judge the validity of his supposed debts. Two different “creditors” claimed he owed them money. Even though the debts were fabricated, he shared his Social Security number and checking account details over the phone after being hounded by the scammers for months. This gave them a green light to withdraw what was “owed” to them. Working the phones with patience and persistence, an advocate was able to figure out what had happened, have the client’s bank account credited, and his credit reports corrected to remove the debt.

A physically disabled woman who uses a respirator called because her electricity had been shut off after a caregiver failed to pay the bill on time. A SLH advocate was able to negotiate a “late reconnect,” and the woman’s power was turned on later that day. The advocate also informed the client of a program for low-income customers that would give her a discount on future bills.

Optional Information on
Collaboration with Other
Advocacy Groups

Mediation coordinator Janelle Snyder was able to take advantage of a fantastic educational and networking opportunity, attending the American Bar Association alternative dispute resolution conference in San Francisco April 8-9, thanks to a full tuition scholarship from the ABA.

Janelle and staff attorney Mona Badie attended the Area 4-organized seminar on working with LGBT seniors April 20.

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Manager David Mandel attended a meeting of the California Housing Counseling Network April 26 to deal with important issues of licensing, foreclosure work collaboration and programs under development by California Housing Finance Agency.

On May 19, David met with staff at CalHFA to discuss SLH's proposal to use part of the \$700 million in TARP funds to leverage reverse mortgages in a way that could save a large numbers of seniors' homes from foreclosure.

Anson Houghton of Resources for Independent Living in Sacramento made a presentation to all staff April 28 on services provided by RIL and related issues.

David attended a two-day summit of the California Elder Justice Work Group in San Francisco April 29-30. It has been followed by a flurry of activity to build more coordinated work on fighting elder abuse statewide.

Various staff participate regularly in LSNC task forces on a variety of key issues that affect low-income Californians generally.

David and staff attorney Michelle Satterlee continued to participate actively with statewide partners for the Model Approaches coordination project, attending several phone meetings and going to San Francisco for the first meeting of the Advisory Group, June 2.

David and other staff met with several legislators in May and June to make sure the hope for restored state funding for the hotline is not forgotten.

David continues to lead the national effort by senior legal hotlines around the country to include them as a fixture in the Older Americans Act when it is reauthorized next year and to appropriate baseline funding for one in every state

Provider: Yuba Sutter Legal Center

Counties: Yuba & Sutter

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

Optional Information on
Collaboration with Other
Advocacy Groups

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Quarter: 4

Provider: Legal Services of Northern California

Counties: Yolo

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

Client, a 72 year old disabled tenant renting an apartment subsidized by the Housing Choice Voucher program (Section 8), sought assistance from LSNC because his water was shut off by the city. Upon further investigation, LSNC learned that the apartment complex was foreclosed upon and repurchased by the bank at auction. The owner had not advised him of the foreclosure. The client needed to move immediately, but lacked sufficient funds to pay for first month's rent and a new deposit. LSNC worked with local agencies and the broker to secure funds to move client to a senior subsidized apartment complex and avoid eviction. The broker provided the bulk of the funds through a negotiated settlement, or "cash for keys," in which possession was provided to the bank in exchange for the funds to assist client with his move. The client is happy with his new apartment which has significantly more amenities and community activities for seniors.

The client, an 82 year old employed as an in home care provider for a disabled person, was not paid for the work she performed. The parties had contracted for an additional two hours per day beyond what was covered through In Home Supportive Services. The client asked for payment from the person who hired her but she refused to pay the client for the work she performed. The client sought assistance from LSNC. LSNC advocates filed a claim with the labor commissioner after first writing to the employer asking for the client's wages. The employer paid the client her wages shortly after LSNC filed the wage claim.

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 Center and at Winters at the Winters Healthcare Foundation on the 4th Wednesday of the month. 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 the City of Woodland, Senior Legal Hotline, and volunteer attorney Shirley Hochhausen to provide a bilingual Foreclosure Prevention Workshop for low income Woodland residents facing the possibility of losing their homes. LSNC staff also attended the Rural Innovations and Social Economics roundtable for non profit providers serving the Capay Valley to discuss legal services for seniors.

Further, LSNC staff attended the Rural Innovations and Social Economics Seniors' luncheon to discuss legal services provided by our office that are available to seniors in Yolo County. LSNC also collaborated with the Yolo Federal Credit Union to provide a free workshop on debt collection defense targeting low income seniors. Finally, LSNC staff attended the "Crisis to Action Summit" organized by Supervisor Jim Provenza, where staff participated in small group discussions concerning the senior services offered in the County, including legal services.

Legal Representation: 84.3

Legal Advice/Assistance: 108.9

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Community Education: 21.9 Special Outreach: 22.4 Total Hours: 237.5

Provider: Legal Assistance to the Elderly

Counties: San Francisco

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

Optional Information on
Collaboration with Other
Advocacy Groups

In June we participated in a statewide meeting of senior legal service providers in conjunction with the model approaches grant. In addition to providers, attendees included the California Department of Aging's Legal Service Developer, representatives of the Legal Aid Association of California and the State Bar of California. The meeting focused on statewide planning issues, most notably funding concerns.
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PSA: 5

Provider: Legal Aid of the North Bay

Counties: Marin

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

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)

Optional Information on
Collaboration with Other
Advocacy Groups

In June we participated in a statewide meeting of senior legal service providers in conjunction with the model approaches grant. In addition to providers, attendees included the California Department of Aging's Legal Service Developer, representatives of the Legal Aid Association of California and the State Bar of California. The meeting focused on statewide planning issues, most notably funding concerns.
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Provider: Asian Law Caucus

Counties: San Francisco

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

A Chinese-speaking client came to ALC for help in renewing his expired green card, but did not realize that he had held conditional resident status. When we checked with the Immigration Court, we found that when his status expired in 2008, the government had initiated a deportation case against him. Because they sent the notice to his old address, he did not attend his hearing and had already been ordered deported without his knowledge. We also discovered that he had been improperly classified as a conditional resident rather than a permanent resident. We got his deportation case reopened and dismissed.

We were able to win approval for legal residence for a developmentally delayed young man who had been undocumented for 5 years. He was denied legal resident status when his family immigrated because he was over 21, but we were able to use the 245(i) grandfathering program to adjust him to resident status.

We also met with the staff at the San Francisco General Hospital Mental Health Rehabilitation Facility, an inpatient psychiatric ward, to explain how we can help them to verify and get documentation of their patients' refugee, asylee, resident, or citizen status, so that they can determine which federally funded benefit program (such as SSI) the person might be eligible for upon release.

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

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

An elderly man had tax problem because he had a "Friend of a friend" prepare his taxes at a discounted rate a few years back. The friend purportedly prepared his taxes for three tax years but made several errors and misrepresentations in the returns causing the client to incur penalty and interest totaling almost \$8000. IRS sent the client several letters informing him that taxes were owed. The Client ignored the letters because he spoke broken English and was not literate in English. The Client is now retired, on social security of \$1300 per month. His employer laid him off two years ago and after unemployment ran out and he could not find work, and he was over 65 years old, he applied for and obtained social security benefits. Now IRS is garnishing his Social Security payment taking almost \$200 per month. That is when client sought help. We were able to work with Taxpayer's Advocates Office and IRS to place the client's account as uncollectible due to hardship. The Client was refunded the funds taken out of the Social Security payment and now has his full social security restored.

Optional Information on
Collaboration with Other
Advocacy Groups

API Legal Outreach continued to work collaboratively with Volunteer Legal Service Program and Chinese Newcomers in the development of educational information about low-income tax rights, especially with seniors. With the downfall of economy and numerous type of scams, paying attention and intervening on behalf of those who are financial resources are limited becomes even more essential in dealing with surviving. Seniors who are already burden with the high cost of living, cutbacks in benefits and for some, the lack of understanding how to navigate around issues may prove to have dire consequences and suffering from tremendous amount of fear for those who are just simply poor and lack information. As such, we are working collaboratively to host an education forum targeted in September 2010.

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Provider: La Raza Centro Legal, Inc.

Counties: San Francisco

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

April Client: Monolingual Spanish-speaking elder on a fixed income attended La Raza Clinic requesting assistance mediating a housing issue. The senior lived with his wife in a three bedroom apartment. Given the extra space and his mother's deteriorating health, he wanted assistance in adding his mother to the lease agreement. However, he was concerned that he might get evicted or face some form of repercussion, as the property managers had told him he was not allowed to have visitors. Under the San Francisco Rent Ordinance Section 37.9(a)(2)(B), tenants have the right to add immediate family members to the rental agreement up to a maximum number of two occupants per room. We assisted the senior in writing a formal request to his landlord. After fourteen days upon receipt of the landlord, the landlord failed to reply and thus the request was deemed as granted. Now that the senior is able to have his mother stay with him for extended periods of time he is better able to care for his frail mother and it relieved him of much undue stress of traveling across the city to check on her.

May Client: Monolingual Spanish-speaking elder attended La Raza Senior Law Clinic requesting assistance in regards to addressing noise nuisances in his apartment building. The senior sought help in contacting his landlord to address the garage parties that were taking place on a regular basis late at night. The senior noted that he had attempted to talk to the landlord personally on many occasions, however to no avail, the parties continued. After talking with the senior further about the state of the apartment complex, it became clear that many housing codes were being broken. The senior explained that there was mold growing in his unit, bugs were collecting, and broken windows had gone un-repaired. We assisted the senior in completing a complaint with the San Francisco Department of Building Inspection. An inspector promptly responded to the complaint and we scheduled a time for the inspection. During the inspection, the agent found several violations and sent a notice to the landlord. The landlord had 30 days to fix and correct the violations after which the inspector returned to check to make sure the unit was up to code. The senior was ecstatic to have the landlord respond to the needs of the unit, something he had been trying to do for months. We met with the client after the final inspection to talk again about addressing the noise issues. With sheer happiness, the senior informed us that the landlord was now being more attentive to his requests and had put a stop to the parties once and for all, telling the "party-ers" that they needed to respect the people living in the building

June Client: Monolingual Spanish-speaking disabled elder attended La Raza, SLP clinic for assistance in requesting help regarding his SSDI.. Apparently the SSA office had been asking this elder man for additional information and this client was anxious about asserting himself because he felt a little intimidated. After several appointments we confirmed all information and completed his request. His SSDI appeal was sent to the Social Security Office and soon thereafter received confirmation from SSA he was approved, and that his first check would be directly deposited in his account.

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Optional Information on
Collaboration with Other
Advocacy Groups

This past quarter was a busy one: assisting elders with their legal issues, which nowadays an elder comes in with multiple legal concerns. While we tended to our clients' multiple concerns we also wanted to ensure that our visibility was known in the community. Although the attendance of some public meetings were less this quarter we made sure to stay connected with our collaborators and our networks.

Another trend we noted is that a single client issues are becoming much more complex, which requires that we spend more time on single issues. As we pursue the more complex issues, we also work on other less complex issues that the client may have. This is mostly a concern because while our units of service hours are accumulating, and our contact hours with a single client grows, the number of total unduplicated clients suffers in comparison and our goal for unduplicated consumers is a greater challenge.

Because issues are becoming more complex and varied; we want to ensure that we are receiving the support and proper guidance to address our clients' needs effectively as well as efficiently. In addressing our clients' needs we are fortunate to continue our collaboration with members from Legal Aid Association of California. Exposure to LAAC has allowed La Raza's Senior Law Project to obtain the legal support from other legal service providers within California; some senior legal aids and others that assist in a specific area. This past quarter, we had the opportunity to be invited to the Legal Aid Association's Annual Stakeholders meeting as well as being invited to be on the Advisory Board. I believe this opportunity to be involved with LAAC has allowed La Raza's Senior Law Project to become more visibly known for assisting Elders as well as gaining legal trainings.

We are very fortunate to continue our Senior Rights Bulletin and look forward to many more bulletins the next fiscal year. This last quarter we were excited to publish a story about one of our elders, although she had a successful outcome we are concerned that many elder are experiencing situations such as the one published but their concerns are not being addressed either because they are isolated due to age, socialization or they are intimidated. Interestingly, I find that many monolingual Spanish-speaking elders who are legal residents and citizens are anxious to advocate for themselves because of fear of reprisals. I believe this concern needs to be addressed but have not found the avenue in which to address it.

PSA: 7

Provider: Contra Costa Senior Legal Services

Counties: Contra Costa County

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

Optional Information on
Collaboration with Other
Advocacy Groups

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Quarter: 4

PSA: 8

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

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

"Maria," a senior living in a DV shelter, had no income after leaving her abusive husband. Although she had applied for Social Security benefits, Social Security had denied her application based on her husband's resources, even though she had no access to his resources We helped her file an appeal. Getting the benefits will help her stay out of the abusive relationship by allowing her to qualify for and afford senior housing.

- "Edith" is a 76-year-old living in East Palo Alto. Her adult daughter has abused drugs, verbally abused Edith, stolen Edith's things, and refused to pay rent. A year ago, the daughter was shot. The crime went unsolved, but Edith believed it was related to the daughter's drug activity. The daughter survived the shooting, but Edith lived in fear that the shooters would come back and make her their next victim -- either as an innocent bystander or as the intended victim to get back at her daughter. We mentored a volunteer attorney, who obtained a 3-year restraining order for Edith. The order also forced the daughter to move from Edith's home.

Optional Information on
Collaboration with Other
Advocacy Groups

We have attended meetings for Commission on Aging and Adult Abuse Prevention Collaborative. We conducted presentations and clinics at the San Mateo County Fair, Oceana Terrace Senior Housing and the Veterans Memorial Senior Center. We continue to receive referrals and calls for technical assistance from the Ombudsman program and AAS.

PSA: 9

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Provider: Legal Assistance for Seniors

Counties: Alameda

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

Legal Assistance for Seniors represented a seventy-two year-old woman who was referred to our office by the District Attorney's office. 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. They frequently got into violent fights with one another, resulting in destruction of our client's property. Our client feared for her safety as well as the safety of her daughter's ten year-old son. 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 and her grandson.

Legal Assistance for Seniors filed for temporary restraining orders against our client's daughter and son-in-law as well as temporary guardianship of the client's grandson. 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. When an Alameda County sheriff removed the abusers from our client's home and the abusers attempted to take the minor with them, the sheriff informed them that the child would remain with our client.

Legal Assistance for Seniors represented the client in both the elder abuse and guardianship hearings. Permanent restraining orders and a permanent guardianship order were granted; communication between the client and her daughter and son-in-law is limited to peaceful communication regarding the minor. Now that our client is the legal guardian of her grandson, she has enrolled him in afterschool tutoring and has scheduled regular therapy sessions at Children's Hospital. Our client has reported that she no longer lives in fear and her grandson's grades and behavior are steadily improving. Legal Assistance for Seniors provided an elder 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 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: Fair Housing Law Project

Counties: Santa Clara County

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

Optional Information on
Collaboration with Other
Advocacy Groups

Provider: Senior Adults Legal Assistance (SALA)

Counties: Santa Clara County

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

Optional Information on
Collaboration with Other
Advocacy Groups

For the Fourth 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 Fourth Quarter of 2009-10, SALA attorneys also participated in a meeting of the Public Benefits Task Force.

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

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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)

In addition to hundreds of individual cases handled by Senior Citizens Legal Services during the past year, staff is also representing hundreds of low income seniors who own mobile homes in two separate mobile home parks located in Santa Cruz County. In one case, Alimur Mobilehome Park, the park owner seeks to cover the home spaces to private condominium sites. The net effect would be a 50% loss of equity in the residents' homes. The residents have won at 4 administrative hearings and one time at the Superior Court level. This case will be heard again by the Superior Court within the next 6 months and is likely to be appealed. It is a case of 1st impression. In the second case, Surf and Sand Mobilehome Park, the park owner has applied to close the park entirely and provide the residents with a pittance for the lost equity in their homes. If successfully, the closure would result in approximately \$8,000,000 in hard-money loses to the elderly residents. The residents have won two administrative hearings and the case is on appeal in federal court. The park owner also seeks to convert the park spaces to individual condominium lots if the closure procedure is unsuccessful. In that case, the net equity losses would be approximately \$4,000,000. The residents have won at all of the administrative hearings held in this case as well.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 14

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Quarter: 4

Provider: Central California Legal Services

Counties: Fresno and Madera Counties

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

The Housing Authority denied permanently disabled client's request for a live-in caretaker and reduced her voucher from a 3-bedroom apartment to 2-bedroom. CCLS challenged the Housing Authority's decision because it failed to take into consideration the claimant's impairment related limitations and make a reasonable accommodation by allowing a live-in caretaker.

The Housing Authority relented after negotiation and also restored client's voucher to 3-bedrooms (allowing her to remain in her home).

Benefit to client: medically necessary live-in care; restored original Section 8 voucher.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 15

Provider: Central California Legal Services, Inc.

Counties: Kings County

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

Optional Information on
Collaboration with Other
Advocacy Groups

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Quarter: 4

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

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

Optional Information on
Collaboration with Other
Advocacy Groups

1. This quarter we arranged to have the AAA Information and Assistance staff distribute information about the Senior Legal Services program with food coupons at the local Farmers' Markets.
2. Sequoia Community Mediation Center: Our advocate's participation in the governing committee of this group continues. This has helped lead to the Center's expansion to handling consumer , tenant and neighbor issues.
3. HICAP: Our advocate continues to collaborate with the local manager, advising staff and volunteers as needed.
4. Public Guardian & Adult Protective Services: As our advocate is located in the same office suite with these offices, staff continues to call on her more frequently re legal issues involving their senior clients. Also through my partnership with these offices I participate in the monthly MDT meetings, and was invited to participate in the newly-formed Elder Death Review Team.
5. United Way of Tulare County: Our advocate continues to serve on the board and to educate staff, volunteers and partner agencies about legal services for seniors. She also chairs a committee of community members from throughout the county, creating a succession plan for the organization, keeping that group aware of seniors' needs.
6. Self-Help Law Collaborative & Family Law Facilitator: I continue to meet quarterly with this group (convened by the local Family Law Facilitator/Self-Help Law Resource Center), and to partner with another member to prepare, market and present clinics on Independence Preservation /Conservatorship Prevention.
7. Porterville Adult Day Services: As a result of my partnering with the Executive Director of this non-profit I provided two well-received classes for caregivers at her annual caregiver training.

PSA: 16

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

Fiscal Year: 2009-2010

Quarter: 4

Provider: California Indian Legal Services

Counties: Inyo & Mono

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

4th Quarter Activity:

Case #1: A recently institutionalized senior was referred to us through our linkage with the local Ombudsman program. The client explained that he needed a financial power of attorney so that someone could handle several legal matters. One important matter was that the title to his mobile home was located in his safe deposit box at his bank which is located sixty miles away from the nursing home he currently resides in. He was unable to sell/transfer the mobile home due to being bedridden and unable to travel to the bank. The banking policy required either a power of attorney or conservatorship document to allow access to his safe deposit box by someone other than him. The client also needed assistance with managing the financial obligations of his previous residence. A home visit was made to the client at the nursing home to prepare the power of attorney documents for the client. The documents were drafted and all necessary witnesses were present for the client to execute these documents. We received a very nice thank you letter from the client.

Case #2: A senior client had been the sole and long-term caregiver for his spouse for several years. In June 2010, the client made the extremely difficult decision to place his spouse in a local nursing home for long-term care. The client requested assistance under the Medicare Catastrophic Care Act which provides distinct "spousal impoverishment protections." A complete analysis was conducted and all necessary documents were prepared to assist the client in meeting the requirements to apply for this benefit. We successfully assisted the client through the approval process for assistance through the Medi-Cal long-term care benefit program. The client had previously been denied Medi-Cal benefits twice before requesting our assistance. The client was then entitled to a refund from the nursing home. We assisted the client in seeking this refund. A full refund of over \$10,000 was issued to our client. The client is very grateful for the services we provided which resulted in relieving him of a heavy financial burden for obtaining the necessary care for his spouse.

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 whether for updates or discussion of state budget and program services.

PSA: 17

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

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

Optional Information on
Collaboration with Other
Advocacy Groups

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

Fiscal Year: 2009-2010

Quarter: 4

PSA: 18

Provider: Grey Law of Ventura County

Counties: Ventura

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

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 19

Provider: Bet Tzedek Legal Services

Counties: Los Angeles County

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

Optional Information on
Collaboration with Other
Advocacy Groups

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: 4

Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

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

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 21

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

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

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 22

Provider: Legal Aid Society of Orange County

Counties: Orange

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

A Home Owners Association (HOA) sued an elderly Orange County resident for non-payment of dues. We were able to negotiate a payment plan to allow the homeowner to make monthly payments to bring her dues current and avoid the potential loss of her home.

Optional Information on
Collaboration with Other
Advocacy Groups

In June, we attended the Model Approaches Statewide Planning Meeting for Senior Legal Services Providers, sponsored by the California Department of Aging, the Legal Aid Association of California (LAAC) and Seniors in Sacramento.

In June, we also attended the Annual Legal Services Stakeholders Meeting, convened by the Public Interest Clearing House on behalf of the Legal Services coordinating Committee.

PSA: 23

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

Fiscal Year: 2009-2010

Quarter: 4

Provider: Elder Law & Advocacy

Counties: San Diego

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

Client was a low-income senior, and his only source of income was Social Security. He contacted Elder Law & Advocacy because of a problem he was having with his bank. When our staff attorney met with him, he told her that the bank had removed \$100.00 from his bank account, and had denied access to the other money in his account. After reviewing client's records, our staff attorney discovered that the bank had frozen client's account because of a judgment against client for an old debt. The money that had been frozen was client's Social Security funds that had been directly deposited into the bank account. Client was experiencing significant hardship because he could not access his Social Security funds. Our staff attorney wrote a letter to the bank and reminded them that Social Security funds are exempt from collection. She demanded that client's accounts be unfrozen. The bank removed the hold on the account and promptly refunded the \$100.00 they had removed from the account.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 24

Provider: Elder Law and Advocacy

Counties: Imperial

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

Client discussed with the manager the possibility of renting an apartment at a Brawley, California apartment complex. At that time, the client advised the manager that he had very limited income and wanted to know if there were any options for low-income individuals. The manager told the client that there was a program that subsidized low-income individuals by limiting their rent to 30% of their income. Client told the manager what his income was and that it was imperative that his rent not exceed 30% of his income. The client expressed his interest in this program and gave the manager a \$100 holding deposit. Approximately a month and a half later, the manager called the client and informed him that a unit was available under this subsidized program. When the client went to the apartment complex to inquire about the available unit, the manager told him what the subsidized rate, plus utilities, would be. This amount greatly exceeded 30% of client's income and the manager should have known it would be unaffordable for client based on their initial discussions. Client asked for a refund of his \$100 holding deposit, at that time, but the manager refused to give to him. Client made numerous subsequent requests for a refund of his deposit which were unsuccessful. The Elder Law and Advocacy attorney sent a demand letter to the apartment manager requesting refund of the holding deposit. Within ten days of receiving the attorney's letter, the manager called the attorney and indicated that the client's full refund check was ready for pick-up by the client. Client went that day and picked up his check.

Optional Information on
Collaboration with Other
Advocacy Groups

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

Fiscal Year: 2009-2010

Quarter: 4

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

Provider: Senior Law Project, Inc

Counties: Lake and Mendocino Counties

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

We represented an elderly couple (age 86 and 84) in negotiating a mortgage modification with Bank of America. The monthly mortgage payment was reduced from \$1,254.09 to \$740.53. As a result, the couple will be able to maintain their housing and avoid foreclosure.

Optional Information on
Collaboration with Other
Advocacy Groups

Senior Law Project has provided legal support to HUD certified foreclosure prevention counselors at California Human Development Corporation and received referrals of clients from that agency.

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.

PSA: 27

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

Fiscal Year: 2009-2010

Quarter: 4

Provider: COUNCIL ON AGING

Counties: Sonoma

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

1. In April, 2010, Lisa Greenfield (paralegal) represented a 75 yr. old client with a Social Security over payment of approximately \$15,000. The miscalculation of the over payment was due to Social Security's error. We were successful in assisting the client with an appeal. Client will not have to pay back \$15,000 to the Social Security Administration.

2. In April, 2010, Lisa Greenfield (paralegal) assisted a 74 yr. old client receiving SSI (Supplemental Security income) with an appeal due to an error in the overpayment of her benefit. We were successful in correcting the error and client was not responsible to pay back the over payment.

Optional Information on
Collaboration with Other
Advocacy Groups

6/2/10 – Barbara Swary attended an LAAC Meeting in San Francisco with other elder law and senior legal service non-profits receiving funding under IOLTA and/or OAA regarding collaboration and growth of services and development of services for Older Americans.

PSA: 28

Provider: Legal Service of Northern California

Counties: Solano County

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

Optional Information on
Collaboration with Other
Advocacy Groups

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

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

Fiscal Year: 2009-2010

Quarter: 4

Provider: Senior Legal Services

Counties: El Dorado County

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

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 30

Provider: California Rural Legal Assistance

Counties: Stanislaus

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

We just mediated a case wherein our client has received his home (real property) back in his name after transferring it to his daughter based on unkept promises. In August 2006 client quit claimed property to daughter in exchange for a payment from her for \$1500.00 per month for life. In Feb. 2008 daughter approached client and indicated that she and her family were moving into a bigger house and would he like to move back into his home and she would pay mortgage, taxes and insurance. However, he would not receive the \$1500.00 per month for life. Client agreed. All of the agreements were oral and of course daughter denied the agreements. On June 5, 2008 an altercation occurred between client and daughter's husband, wherein police called; there was no arrest. The very next day client received a 30-day notice to vacate the premises. Client did vacate because daughter still had title; making client merely a quasi tenant. Pursuant to the terms of the mediation, a 60-day escrow is to open wherein title will be restored to client.

Optional Information on
Collaboration with Other
Advocacy Groups

4/9/2010 – 4/10/2010 attended foreclosure basics training in Sacramento 18.5 hours est. 50 attendees;
4/30/2010 attended SEAPA core meeting est. 25 attendees;
6/8/2010 prepared and reported to AAA Commission 4 hours 23 attendees;
6/25/2010 attended SEAPA meeting 1 hour 12 attendees

PSA: 31

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

Fiscal Year: 2009-2010

Quarter: 4

Provider: Central California Legal Services

Counties: Merced

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

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 32

Provider: Legal Services for Seniors

Counties: Monterey

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

Medicare had stopped paying for client's medications. Client, a 67-year old on a fixed income social security pension, was on life-long anti-transplant rejection for a kidney transplant he had received approximately 18 months earlier. Medicare's refusal to cover his drugs meant that client, on his fixed income, would not be able afford his anti-rejection drugs and was suffering the real threat of death. Client had been without his medication for five days when he came to Legal Services for Seniors. Our legal advocate was able to spend time with Medicare, finding out Medicare had incorrectly stopped coverage. Our advocate got coverage restarted immediately, and client was able to continue with his anti-rejection medications, ensuring he would not die from kidney transplant rejection.

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