

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

Fiscal Year: 2011-2012

Quarter: 2

PSA: 1

Provider: Legal Services of Northern California

Counties: Humboldt & Del Norte

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 2

Provider: Legal Services of Northern California

Counties: Shasta, Siskiyou, Lassen, Modoc and Trinity

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 3

Provider: Legal Services of Northern California

Counties: Butte, Colusa, Glenn, Plumas, Tehama

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 4

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Fiscal Year: 2011-2012

Quarter: 2

Provider: Yuba Sutter Legal Center

Counties: Sutter and Yuba Counties

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

Provider: Legal Services of Northern California

Counties: Placer, Nevada, Sierra

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

Provider: Sacramento Senior Legal Services

Counties: Sacramento

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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Fiscal Year: 2011-2012

Quarter: 2

Provider: Legal Services of Northern California

Counties: Yolo

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

Client, age 67 lives in subsidized housing and received a notice that she was not complying with lease because she was allowing a guest to disturb her neighbor. The "guest" is her caretaker through IHSS. The notice indicated she was in direct violation of her lease and any future incidents could and would result in management taking further action and/or terminating her tenancy. This neighbor filed a temporary restraining order against the caretaker. At the proceeding, the Judge ruled that there was no clear and convincing evidence that the caretaker was harassing the neighbor so the temporary restraining order was denied. Client submitted the Minute Order to the manager, who refused to retract the earlier notice of lease violation. Through our advocacy, we determined that the manager did not verify the allegations and simply issued the notice to our client. Since the Judge dismissed the case, the manager had no grounds to punish Client. We negotiated with the manager to amend Client's file to indicate that she was not in violation of her lease and therefore her housing is no longer at risk.

Client, age 61, was served with a 3 day notice to quit due to son's disruptive behavior. His son is 35 and disabled due to exposure to black mold that led to the death of client's wife eight years ago. His son talks to himself and other residents filed complaints due to the noise. Client was served with this notice after he requested his security deposit back from another apartment complex that the same management company manages. He moved from the previous apartment because of habitability concerns that seemed to worsen his son's behavior. We negotiated a settlement with the landlord for a stipulated judgment so that if client moved out of the unit by a certain date, they would dismiss the lawsuit. Client was able to have enough time to move out his possessions and timely vacated the premises as agreed. The lawsuit was dismissed.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 5

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

Quarter: 2

Provider: Legal Aid of the North Bay

Counties: Marin County

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

October 2011

Our client, a senior, came to LAM regarding the burial of her mother at Mt. Tamalpais Mortuary & Cemetery. The mother had been buried but the stone had not been placed and cars/trucks were driving over her gravesite. LAM was able to secure a pro bono attorney to assist. The outcome was that the mother was reinterred and is resting in a much more desirable plot. Although there was substantial cost associated with the move, the cemetery paid for it and did not charge client. In addition, there was a small ceremony with a Rabbi. The attorney spent 15 hours on this case.

November 2011

Client was a 65 year-old disabled woman who needed help understanding the implications of her 90-day notice to vacate her apartment after living there for nine years. Legal Aid of Marin explained the process and helped write a demand letter requesting more time to move out. Our client happily found a new home to live in but needed our help getting her full security deposit back. The old management company deducted money for excessive cleaning charges, but with LAM's help, our client was able to get the full amount of her security deposit back.

December 2011

Legal Aid received a phone call from an 85-year old disabled woman who was facing eviction and seemed to have some capacity and memory problems. Unfortunately, the client called after a judgment had already been entered against her and the sheriffs were set to come out the following morning; by the time she called; it was even too late for LAM to make an ex parte appearance for a stay of execution of the judgment.

Even though the client's rights to prevent or delay the eviction had lapsed, LAM volunteers, Interns, and staff worked together to find temporary housing. They found a case manager at Ritter Center who was willing to meet with the client regarding her housing options and try to get her into a temporary shelter. The morning of the eviction, LAM was unable to reach the client because the sheriffs were already at the property carrying out the eviction. One of LAM's MSW students volunteered to go to the property and discuss these issues with the client, and obtain her consent to speak with case managers and the client's relative, who had also contacted LAM to see if he could assist his aunt. While the MSW student was on her way, the LAM attorney got in touch with the sheriff. The client was already in the back of the patrol car, and the sheriff explained that he was going to bring her to the jail because he did not know where else to take her. The LAM attorney convinced the sheriff that jail was not a reasonable option for this client, and requested the client be escorted to Ritter Center to find shelter. The MSW student arrived, obtained the client's informed consent on the release form, and accompanied the client to Ritter Center and then to the Mill Street shelter to ensure she had a place to stay. LAM was then able to contact the client's relative to ensure he would assist with emptying the apartment and putting the client's personal property into storage. LAM was later thanked by the sheriff's office and the client's relative. A week later, the client's relatives arrived from out of town and were able to work with the case manager at Ritter Center to secure permanent ecumenical housing.

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Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 6

Provider: Legal Assistance to the Elderly

Counties: San Francisco

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

Client is a 61 year old HIV positive white male, who lives in subsidized housing on the edge of the Western Addition. Management sought to evict him based on his behavior, including alleged threats to building staff and other residents. Our Housing Attorney negotiated a stipulation with his landlord which permits him to stay based on his promise of good behavior.

Optional Information on
Collaboration with Other
Advocacy Groups

Our Executive Director continues to participate in the Senior Legal Services Programs Steering Committee. This informal statewide group, convened by the Legal Aid Association of California, meets telephonically on an as needed basis (typically 4-6 times a year) to discuss issues of mutual concern. These issues include: training; funding; client needs; resource sharing and volunteers.

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Provider: Asian Law Caucus

Counties: San Francisco

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

An elderly monolingual Cantonese speaker returned from China earlier this year (from a family funeral) only to find that her husband left her and the landlord was increasing the rent triple-fold. With her only income from public benefits well below the proposed rent, she was basically being evicted. SF rent control ought to apply to prevent the increase, but the landlord tried to circumvent this by claiming that she and her husband had recently moved into senior housing and were trying to keep two low-rent units (one for other family members). Our client claimed that her husband surreptitiously left her after years of psychological abuse by him. The landlord didn't believe our client's story, and so the tenant filed a petition with the Rent Board. We successfully represented the client at the hearing on the merits. The landlord won't be appealing the Rent Board decision denying the rent increase.

Prevented eviction of a widow from subsidized housing. Ms. D and her husband moved into senior housing 3 years ago based on his eligibility. He became sick, was admitted to the hospital and was transferred to a nursing home. He died there in 2010 before he was well enough to return home. Property management attempted to more than double her rent as a result. She was only making enough for her basic necessities after becoming a widow, and the rent increase placed her in risk of becoming homeless. We contacted property management and challenged the rent increase decision as a violation of federal law that should allow remaining family members to keep the subsidy. Ultimately, we persuaded management to rescind its proposed rent increase before any litigation was initiated.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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Quarter: 2

Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

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

October Client: Spanish speaking client came to our clinic with the summons and complaint for a \$20,646 credit card debt. With our help, the client was able to file a general denial and stop the legal proceedings in order to negotiate the debt in more favorable terms based on our client's disabilities, certified by numerous doctors. We contacted the opposing counsel to explain the situation and after some negotiation we were able to lower the amount and settle the case in the amount of \$10,757. The plaintiff dismissed the case once the settlement agreement was duly signed by the parties.

November Client: A senior resident came to our La Raza Senior Law Clinic reporting a rent increase that would double up his current rent. The landlord claimed that the tenancy was exempt from the Rent Control and actually fell under the Costa Hawkins Act, which allows market price rent increase for tenancies initiated after 1996. We gathered evidence to show that he was a tenant before 1996 such as letters sent to him to that address, witness testimony by neighbors, pictures and written communications with the landlord showing his status as tenant since 1989 to date. With all the evidence, our client was able to file a wrongful eviction complaint before the San Francisco Rent Board of Stabilization seeking to declare that the rent increase was illegal. This would be useful in case the landlord decided to file an unlawful detainer complaint once the notice with the rent increase became enforceable. Finally, the Rent Board ruled that the rent increase was indeed illegal so the old rent stays. The client was able to keep his tenancy which had been in jeopardy due to the rent increase the landlord was intending to impose on him.

December Client: A Spanish speaking extremely low income senior resident came to our La Raza Senior Law Clinic with a debt for \$2,058 that he could not pay because he only receives a small check from the Social Security Administration. The debt collection agency was very aggressive, writing him multiple letters a month and seeking to put a lien on his bank account. We helped the client write a Cease and Desist letter to the collection agency explaining that his social security benefits are exempt from collection actions of any type, therefore his check could not be garnished. Finally, we received a letter from the collection agency stating its compliance with the applicable law and agreeing to cease all collection efforts and close the account.

Optional Information on
Collaboration with Other
Advocacy Groups

We had a very active Fall 2011. During this past quarter we were able to maximize the use of the state-of-the-art equipment to do presentations around the city reaching out to six senior centers, totaling 90 new clients. We provided presentations and Q&A sessions on public benefits, housing, consumer fraud and estate planning for a diverse group of seniors including Hispanics, Asian and Afro-Americans.

We keep participating actively at the Latino Partnership with monthly meetings at the 30th Street Senior Center where we share point of views and talk about common issues. Likewise, but keep collaborating with the Senior Rights Bulletin by providing pertinent articles for seniors and providing proofreading and editing for the Spanish version of it. We just drafted an article on Medicare and Third Party Liability to be

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published during the Spring 2012.

Finally, we still collaborate actively with the Legal Aid Association of California, Senior Law Chapter in both the Steering Committee and the Languages Access Committee. Our goal is to provide our input in sensitive and crucial legal issues of interest for seniors.

Provider: Asian Pacific Islander Legal Outreach

Counties: San Francisco

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

Mr. P and Ms. O are an elderly couple with limited proficiency in English. They are no longer working and thus have limited fixed incomes. Their apartment building has been foreclosed recently. They received a letter afterward, offering them about \$1,000 in exchange for moving out in two weeks. They had lived there for over ten years and their unit is covered under rent-control laws. It would be difficult for them to move to another place. They also may not be able to afford another rental unit in San Francisco. But the letter threatened an eviction lawsuit if they did not move out. APILO informed them of their rights following a foreclosure and contacted the landlord's attorney. The landlord decided not to evict them.

Optional Information on
Collaboration with Other
Advocacy Groups

As a result of the foreclosure crisis that has steadily worsened during the past few years, California and many of its homeowners have been particularly hard hit. API and other homeowners who purchased or refinanced homes in San Francisco during the boom years of the housing market within the last decade are now facing more job loss, payment shock re-adjustments on ARM purchase, refinance or home equity mortgage loans and the dire challenge of possibly owning a home which may now be "underwater" in its current value - i.e., having a secured debt obligation on a home which is higher than the property's current fair market value.

Immigrants and many seniors have also been, particularly, vulnerable to being targeted for an array of predatory and abusive lending practices due to affinity marketing practices by unscrupulous realtors, mortgage brokers and lenders. As a result, too many immigrants who do not read or write in English have been unknowingly put into high cost and risky home loans. With the growing aging baby boomer population in San Francisco, many immigrant and other seniors have also been put into inappropriate and highly costly reverse or forward mortgage loans. Through APILO's current Intake process and other program services, we can assist these homeowner residents in San Francisco, many of whom are low-income and low wealth, but have the single major asset of their home which they live in and worked their whole lives to pay for as follows: by reviewing these homeowners' original mortgage papers and loan terms to see if any legal abuses may have occurred previously. We can also assist these homeowners, especially those who are currently in distress and behind on their mortgage payments, to seek legally supported and, in some instances, required mortgage loan modifications with their current loan servicers. Lastly, if appropriate, APILO can further refer these individuals to HUD-certified housing counseling agencies for added needed assistance.

PSA: 7

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Quarter: 2

Provider: Contra Costa Senior Legal Services

Counties: Contra Costa Senior Legal Services

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 8

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

Quarter: 2

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

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

Ms. V is a 77-year old senior living on a fixed income. Wells Fargo Bank gave her a line of credit, and then took out \$700 from a separate checking account that contained only her retirement payments, without her permission, to repay part of what she owed on the line of credit. Several times, Ms. V requested that the bank refund the money, but the bank refused. We filed a consumer action against Wells Fargo for illegally taking her Social Security benefits and pension to repay themselves. Wells Fargo eventually agreed to reimburse Ms. V the \$700 and paid her an additional amount for the trouble they had put her through.

Mr. & Mrs. K came to us because the Human Services Agency (HSA) was going to reduce their CalFresh (formerly Food Stamps) benefits from \$367 to \$106. Mrs. K. is 61 yrs. old and has over \$600/month in medical expenses because she has lung disease. HSA should have deducted the medical expenses from the couple's income before determining the amount of their CalFresh benefits. We helped the couple request a hearing and negotiated with the County to correct their calculations and restore Mr. & Mrs. K's CalFresh benefits. We also advised Mr. & Mrs. K about a Medi-Cal program that could cover some of her medical expenses and helped them apply for the program.

Our 83-year-old client came to us because her son had physically assaulted her, causing cuts and bruising to her hands and arms. The police kicked the son out of client's house, gave her an emergency protective order and advised her to get an elder abuse restraining order. We took over the case and learned that the son's verbal, emotional and financial abuse had been going on for years, but had only recently escalated to physical abuse. The client was terrified of her son and worried that the abuse would continue to escalate. We went to court and got a three-year elder abuse restraining order for the client. One of the best outcomes from this case was the improvement in the client's health. Prior to the restraining order, client had needed blood pressure medication for years. Her doctor had told her many times that there was too much stress in her life and that she needed to find a way to reduce it. After getting the order, client's blood pressure quickly returned to healthy levels and she was able to stop taking her blood pressure medication.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 9

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

Quarter: 2

Provider: Legal Assistance for Seniors

Counties: Alameda

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

LAS assisted an elderly client that called us because she was afraid to be in her home. She had allowed her grandson to move into her house because he and his girlfriend were splitting up. The grandson and his girlfriend were fighting over custody of their children and these fights had become increasingly violent. One day, the elder came home to find the girlfriend in the house. The girlfriend was tearing the house apart and was holding a knife. The girlfriend started to approach the senior with the knife; fortunately, the elder was able to lock herself in a room and call the police.

This client was staying in her daughter's home in another city. She told the LAS staff that were assisting her that she really wanted to be able to return to her home without having to worry about her safety, so LAS filed for a restraining order for the client against her grandson's girlfriend. The girlfriend came to the restraining order hearing and was very hostile toward the elder during the hearing. The Court granted the restraining order against the girlfriend and after the hearing, LAS staff made sure that the senior was in her car and able to leave the courthouse safely. The staff attorney that worked on this case also followed up with the elder to make sure that everything was resolved – the elder she said that she has been much more at ease knowing the restraining order is in place.

Optional Information on
Collaboration with Other
Advocacy Groups

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

PSA: 10

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

Fiscal Year: 2011-2012

Quarter: 2

Provider: Senior Adults Legal Assistance (SALA)

Counties: Santa Clara

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration With Senior Centers and Other Sites to Deliver Services
For the 2nd Quarter of 2011-12, SALA provided on-site legal service intake appointments at 23 senior centers or sites in Santa Clara County. These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center (San Jose), Seven Trees (San Jose), Eastside Senior Center (San Jose), Mayfair Community Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.

Participation in Annual Legal Services Retreat
Three of SALA's attorneys also participated in the Annual Retreat for legal services attorneys sponsored by the Santa Clara County Bar Association on November 18, 2011.

PSA: 11

Provider: Council for the Spanish Speaking

Counties: San Joaquin

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

1 of 2: This month, our program assisted a senior in a consumer issue by writing a demand letter to a garage door business owner. The business owner over charged the client \$250. Upon receiving the demand letter from the client, the business owner immediately called the client and stated he would send her a refund of \$250. Client expressed a lot of appreciation because she did receive payment from the business owner.

2 of 2: Staff member Lupe Mena, assisted a senior, who was living in the homeless shelter, get medical attention and housing. We completed the MediCal application for him which also includes food stamps. He was approved to receive the benefits. Secondly, Mrs. Mena referred the senior to our community partners, Visionary Homebuilders and Housing Authority of San Joaquin County, for assistance. Upon the seniors return to the office we learned he was living in an apartment. The senior expressed his gratitude.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

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PSA: 12

Provider: Catholic Charities

Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu

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

None

Optional Information on
Collaboration with Other
Advocacy Groups

None

PSA: 13

Provider: Senior Citizens Legal Services

Counties: Santa Cruz County & San Benito County

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

To be provided with the Fourth Quarter Report.

Optional Information on
Collaboration with Other
Advocacy Groups

To be provided with the Fourth Quarter Report.
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PSA: 14

Provider: Central California Legal Services

Counties: Fresno-Madera

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 15

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

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

See story below about our advocate's prompt assistance to numerous vulnerable, displaced tenants after a fire in their apartment building.

Optional Information on
Collaboration with Other
Advocacy Groups

1. Collaboration with United Way of Tulare County, HICAP, Self-Help Resource Center, Information & Assistance staff and others continues as previously reported.
2. In addition, collaboration with Tulare County Public Guardian/Adult Protective Services and the statewide network of Senior Legal Service providers (through their two listservs), plus Central California Legal Services, enabled our advocate to provide prompt, valuable assistance to almost 30 vulnerable, displaced, fearful tenants who were victims of an apartment fire. A landlord representative had gone to the shelter where they were staying temporarily, and essentially threatened the whole group (nearly all of whom were elders, seriously disabled, or both) that they had no legal right to find other housing, even though they were living on cots in a Memorial Building, a situation that threatened the health of many of the victims. Our advocate was able to arrive that same afternoon to calm their fears and make needed referrals to other resources as well.
3. The fire incident made obvious the need for more collaboration in the event of an emergency, and our advocate raised that topic with the Self-Help Law Collaborative meeting that month. The collaborative is working on a phone listing to be used by its members in the event of an emergency, so key people in the organizations can be reached more easily.

Provider: Central California Legal Services, Inc.

Counties: Kings

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 16

California Legal Services (Title III B)
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Provider: California Indian Legal Services

Counties: Inyo & Mono

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

2nd Quarter Case Narratives:

CASE #1 : We assisted a 73 year old client with a "settlement offer" from a slip and fall accident the client was involved in at a local store. Client had already filed an accident report with the store and the store was requesting additional information. Client wanted legal advice regarding whether or not the settlement offer of \$5,000 was in her best interest and any other advice we could provide. The advocates reviewed the settlement offer and advised the client to request any future medical bills related to this injury be included in the settlement. We also assisted the client with proper completion of the authorization of release of information and the Medicare Third Party Liability forms needed to complete the client's claim. Client was also advised to contact her supplemental medical insurer and advise them of this claim.

CASE #2: A 60 year old client requested our assistance in withdrawing a credit counseling contract for debts totaling \$ 19,000 with a monthly payment rate of \$500. At the time the client entered into this contract this arrangement was a good solution but due to additional financial hardships recently incurred the client can no longer afford the monthly payments. Our advocate reviewed the client's current financial information as well as the debtor liabilities to make an assessment. We assisted the client in sending a certified mail letter to withdraw from this agreement with the credit counseling agency. We further advised the client of what action the collection agency can take and provided information on the client's rights.

CASE #3: Three separate senior clients and families requested assistance with exploring options for home health care costs. First case is a 91 year old widow living at home requiring night-time care at the cost of \$3,000/month. We advised the client that they may be eligible for Veteran Surviving Spouse benefits for Aid and Attendance which will pay the client \$1,060/month. Second case is an 81 year old client that suffered a stroke this past October and had recently returned home with her family but had to arrange 24 hour care assistance. After reviewing the client's case, we advised the client to explore the Veteran Surviving spousal benefit for Aid and Attendance along with In Home Supportive Services with the local Department of Social Services. Additional legal advice was provided to the client regarding transfer of the client's home and the potential adverse impacts to future Medi-Cal benefits. Third case is an 84 year old client living at home requiring constant in-home care and only receives Medi-Cal benefits. The client's spouse currently lives in a nursing home in Northern California. The client requested assistance with multiple estate planning strategies, including home protections, additional resource planning to pay for in-home care, information on Veteran's Spousal Aid and Attendance benefits and information on increasing the minimum monthly maintenance needs allowance under Medi-Cal (which is not applicable in this case). We educated the client and family on Medi-Cal processes, additional resource information such as the lower the withholding of taxes from the husband's pension, thereby providing more income for the wife for care giving expenses.

Optional Information on
Collaboration with Other
Advocacy Groups

The Inyo Mono Senior Legal Program was featured in the National Senior Citizen Law Center's on line e-magazine "In Review" section for its continuing coordination and networking activities on behalf of local seniors.

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

PSA: 17

Provider: Central Coast Commission For Senior Citizens Counties: San Luis Obispo and Santa Barbara

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 18

Provider: Grey Law of Ventura County Inc. Counties: Ventura

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 19

Provider: Bet Tzedek Legal Services Counties: Los Angeles

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 20

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Quarter: 2

Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

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

Case Story #1:

Senior client came into office for assistance in obtaining Domestic Violence Restraining Order against her husband. Client has been married for six years. Throughout the marriage husband became more abusive, calling her names, throwing things and finally threatening to kill her. Client requested and was granted a Temporary Restraining Order. Client came to ICLS office looking for representation in her Domestic Violence Hearing because she was afraid and only speaks Tagalog. Shortly after obtaining the Temporary Restraining Order, client moved in with her sister. While meeting with the client to prepare for her hearing, she explained that since she moved out she was no longer afraid of her husband and did not want to pursue the restraining order, but she did want to get her personal belongings out of the apartment she used to share with him. I represented client at the Domestic Violence Hearing and the Restraining Order was dismissed but client was granted an order to retrieve her belongings from the apartment. Client was very relieved and happy to have had representation at the hearing and assistance throughout the process.

Case Story #2 (11E-7009805):

Client is a 77 year old senior who is supporting her two grandchildren. She came to ICLS office on November 15, 2011 and already had an eviction judgment entered against her. She did not file a response to the eviction judgment. There was a sheriff's lock-out set for November 16, 2011. ICLS prepared a motion for her to stop the lockout scheduled for the 16th and for her to have her day in court. In court the judge delayed the lock-out until November 28, 2011 which gave our client much needed time to move.

Case Story #3:

Client is in the early stages of Alzheimer's Disease. She came to the office with her daughter. Daughter explained that she is now taking care of her mother's Medi-Cal, Social Security and household expenses. She stated that she had applied for In-Home Supportive Services for her mother; but she was told that her mother's Medi-Cal was discontinued 10/31/2010. Daughter stated that they never knew this. Client had seen the doctor during the time period starting 11/1/2010 forward; now they are receiving bills stating that client owes for the unpaid portion that Medicare didn't pay.

Client has reapplied for Medi-Cal but they wanted to know what they could do for assistance with the unpaid medical bills. ICLS advised them to request a State Hearing regarding the 10/31/2010 discontinuance. ICLS agreed to investigate and possibly negotiate an agreement with the County of San Bernardino by claiming good cause for the client's failure to provide information to reevaluate the client's eligibility to Medi-Cal.

The County of San Bernardino agreed to reopen the client's Medi-Cal effective 1/1/2010. The client was able to have Medi-Cal pay for the services the client received from 11/1/2010 through the date of the new application.

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

Fiscal Year: 2011-2012

Quarter: 2

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 21

Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

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

Case Story #1 (11E-2003403:

Represented client at her Food Stamp Overpayment Hearing. Client received notice of overpayment. CDSS failed to calculate the change in client's income even though she reported it. Made sure that the county computed the overpayment correctly and in addition, went to hearing to make sure the hearing record reflected that client was without fault (can not go after her for fraud in the future) in casing the overpayment and went on the records stating the terms for collection including but not limited to that the state cannot intercept tax returns and can only collect at 5%.

Case Story #2:

Client is a 77 year old Persian woman living alone, speaks English as a second language and is hard of hearing. Client used to have Charter Cable, but they kept raising the prices on her so she switched to Verizon because they said they would only charge her \$49.99 a month for her cable, internet and TV. Her bill was higher than \$49.99. She went into the Verizon store and they told her that they fixed it. The next month it was \$140. She went back to the Verizon store and they told her that they fixed it but could not credit back her account and she would have to pay what was due to date, but that moving forward, it would be correct. The next month it was \$68. She went in again and the lady she had been speaking to told her that she could not help her. English is the client's second language and she says that she has lost 80% of her hearing so it is very hard for her to understand things on the phone, which is why she had to go into the store and could not call. I advised the client that if they would not lower her bill she could try to pursue her claim in small claims court. I reviewed the bills and saw that there was a charge of \$39.00 for technical assistance. She was also being charged for premium internet on the previous bill. The current bill showed that she was receiving ShowTime and the Choice Extra Package instead of the Choice Package. She said that she never asked for these things. I called Verizon and went over this with the Verizon representative. He adjusted the price so that her monthly charge was correct. He also credited the \$39.99 and the premium internet charges. Her current balance due was \$169.62 prior to coming in and I had it lowered to \$109.62. Additionally her bill should be \$49.99 from this point forward.

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 22

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

Fiscal Year: 2011-2012

Quarter: 2

Provider: Legal Aid Society of Orange County

Counties: Orange

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

We recently received a favorable Administrative Law Judge decision in a Social Security (SSA) overpayment case. One of client's daughters, who is disabled, received child's benefits on her Father's account. SSA claimed that she had been overpaid \$83,000. She appealed their decision. SSA Then started collecting from our client's monthly retirement benefits, as she was also paid from her deceased spouse's account. Our client, is age 88 with dementia and living in a board and care facility. Following a hearing, the ALJ waived the overpayment as to our client. Shortly afterwards, Social Security refunded the money they collected from her benefits.

We also assisted a client who receives subsidized housing through his local Housing Authority. His Worker told him that he needed to provide them with a copy of his birth certificate, or he could lose his benefits. The client had legally changed his name many years ago in another state. He had tried but was unable to obtain his birth certificate and so contacted us. We were able to obtain a certified copy of the court order changing his name and, with that, obtain a copy of the birth certificate which he provided to his worker.

Optional Information on
Collaboration with Other
Advocacy Groups

We are currently seeking to establish clinics to help serve more clients in an efficient manner. We are currently working with the court, private attorneys, the Public Law Center and Chapman Law School's Elder Law Clinic to establish a Clinic to assist with Limited Conservatorships over certain persons with developmental disabilities. We are also working with the UC Irvine Law School to create an SSI Clinic.

PSA: 23

Provider: Elder Law & Advocacy

Counties: San Diego

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

NOT APPLICABLE FOR THIS QUARTER.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 24

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

Fiscal Year: 2011-2012

Quarter: 2

Provider: Elder Law & Advocacy

Counties: Imperial

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

NOT APPLICABLE FOR THIS QUARTER.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

PSA: 25

Provider: Bet Tzedek Legal Services

Counties: Los Angeles City

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 26

Provider: Senior Law Project, Inc.

Counties: Lake and Mendocino Counties

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

A client was charged with a \$54,431 overpayment by a union administered health plan. The claim was based upon medical payments made by the plan over a 9 year period. The plan argued that the client should have purchased Medicare Part B coverage during that period and that coverage would have reduced the plans obligation. The client was not aware of the requirement to purchase Medicare Part B coverage and instead relied fully on the plan for medical coverage. As the result of our advocacy the overpayment claim was reduced to \$10,178, an amount equal to what the Medicare coverage would have cost the client had it been purchased. Our client was able to arrange an affordable payment plan to cover that remaining obligation.

Optional Information on
Collaboration with Other
Advocacy Groups

Senior Law Project continues to collaborate with IHSS Advisory Committees in both Lake and Mendocino Counties. The Senior Law Project attorney continued to provide legal counsel to the Lake County IHSS Advisory Committee in connection with the recommendation by the Department of Social Services Director that the committee be disbanded. As a result of advocacy by Senior Law Project and members of the committee, the Board of Supervisors did not adopt the recommendations.

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

Fiscal Year: 2011-2012

Quarter: 2

PSA: 27

Provider: Council on Aging

Counties: Sonoma

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

11/18/11 - Sonoma County Bar Association sponsored Pro Bono Awards Luncheon. Networking with other elder right advocacy groups including, Empire College School of Law Legal Clinics, Disability Services & Legal Center, California Rural Legal Assistance and Legal Aid of Sonoma County.

PSA: 28

Provider: Legal Services of Northern California

Counties: Solano County

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Continued collaboration with Ombudsman Services of Northern California and Senior Legal Hotline. Continued participation with community groups including: FAST, Solano Senior Coalition, and Vallejo Senior Roundtable.

Provider: Legal Aid of Napa Valley

Counties: Napa

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Aid continues to work closely with several community partners and has developed Medical Legal Partnerships with several agencies in the Napa County including Community Health Clinic Ole, Family Services of Napa Valley, Napa County Comprehensive Services for Older Adults, Napa County Health and Human Services, Queen of the Valley Medical Center Community Outreach and Harvest Pediatrics.

In addition, the staff attorney for the Seniors Program at Legal Aid continues to provide indirect services to seniors with her involvement as vice chair of the Napa County Commission on Aging, the vice chair of the Advisory Committee of In Home Supportive Services, Chair of the Latino Elder Coalition, member of the Napa County Elder Abuse Prevention team, the Napa County Financial Abuse Specialist Team, Healthy Aging Population Initiative and the newly formed Napa County Hoarding Intervention team.

PSA: 29

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

Fiscal Year: 2011-2012

Quarter: 2

Provider: Senior Legal Services

Counties: El Dorado County

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated

PSA: 30

Provider: Law Office of Joyce Gandelman, Senior Law Project **Counties: Stanislaus**

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

1. We successfully reinstated SSI payments for 3 seniors whose payments had been terminated for various reasons. Once their SSI was reinstated we were successful in reinstating their Medicaid benefits.
2. We were successful in an unemployment benefit case where the senior had been denied benefits because of alleged sexual harassment. The senior has received his back pay and weekly benefits.
3. We have been successful in negotiating bill disputes and stopping creditor harassment.
4. We were successful in a section 8 housing appeal.
5. We have successfully filed and obtained restraining orders for 20 seniors/dependent adults.
6. We have added 3 new attorneys to our pro-bono Will panel.

Optional Information on
Collaboration with Other
Advocacy Groups

•Senior Law Project has seen 7 clients under the age of 60 for restraining orders referred to us by Adult Protective Services. These clients were disabled adults and therefore fit the APS criteria for referral to Senior Law Project for restraining orders. This number is not included in the tally because there is no place for clients under the age of 60.

PSA: 31

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

Fiscal Year: 2011-2012

Quarter: 2

Provider: Central California Legal Services

Counties: Merced

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

OCTOBER 2011

Case No. 11E-3005554. Client, 74-year-old woman, was employed with and volunteered at an agency for several years. Client claims she performed her duties at the same high level throughout her tenure. Client was fired from her position earlier this year and believes that her termination was the result of age discrimination. Client had previously filed a complaint with the Equal Employment Opportunity Commission (EEOC) and received a hearing date. Attorney advised client on how to prepare for her upcoming EEOC administrative hearing.

Case No. 11E-3001260. Client, a low-income 69-year-old woman, was recently widowed after her initial consultation and was not sure if she wanted to go forward with completing her simple estate planning documents. Attorney encouraged client to take some time to grieve and settle her husband's affairs. Attorney contacted client again a few weeks later and explained the importance of completing these documents. Client agreed to proceed. Attorney assisted client with completing her Will, Power of Attorney and an Advance Health Care Directive. Attorney also provided client with information on how to prepare her funeral and burial instructions and how to name beneficiaries on her accounts at financial institutions.

Case No. 11E-3004402. Client, a low-income 72-year-old man who is Spanish speaking only, was being harassed by Capital One on his credit card debt. Client claimed he received threatening phone calls from Capital One and was given misinformation about what would happen to him if he did not pay. All of client's communications with Capital One were done in Spanish, including his billing statements. Attorney advised client on his consumer rights and on the creditor's rights to attempt to collect the debt. Attorney drafted a cease and desist letter in Spanish to Capital One to request they stop calling client and sending him future correspondence.

NOVEMBER 2011

Case No. 11E-3002856. Client, 66-year-old low-income woman who lives alone, was pressured into signing up to purchase an expensive carpet cleaner by a door-to-door salesman. Client could not afford the carpet cleaner and as a result, signed up for a finance plan. Soon after client purchased the device, she realized she did not want or need it. Moreover, due to client's frail condition, she was unable to operate the heavy device. Attorney negotiated with the local distributor and their finance company to assist client with canceling the contract, with no further financial obligation to her. Attorney also arranged for local distributor to pick up the device from client's home.

Case No. 11E-3005296. Client, 72-year-old woman, was on title to a house with her father. Client's father recently passed away. Attorney advised client on her property rights and requested she obtain a certified copy of the death certificate and a copy of the deed. Attorney then drafted an Affidavit of Death of Joint Tenant, administered an oath to client and notarized the document. Client was then advised to and successfully filed the affidavit at the Merced County Recorder's Office.

Case No. 11E-3006384. Client, 79-year-old low-income rural woman, who is Spanish speaking only, needed assistance with obtaining a Power of Attorney. Attorney advised client on the importance of a Power of Attorney to manage her finances. Attorney then assisted client with executing a Power of Attorney to appoint her daughter as her agent.

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

Fiscal Year: 2011-2012

Quarter: 2

DECEMBER 2011

Case No. 11E-3003440, Client, 89-year-old low income, nearly blind woman and survivor of Hurricane Katrina was relocated to Merced County. Client and her adult son were each other's caretakers until her son recently underwent hospitalization and rehabilitation for serious illness. Son's friend volunteered to live with and take care of client and her son, during this difficult time. Attorney assisted client with completing a Power of Attorney to give son's friend the legal authority to continue to assist client. Attorney also gave client referrals to Area Agency on Aging services including: Medi-cal counseling, In Home Support Services and HICAP.

Case No. 11E-3006505, Client, 83-year-old low-income man, who lives alone, sought assistance with preparing his first Will and Power of Attorney. Attorney drafted custom will for client and advised him on the completion of his Power of Attorney. Attorney also notarized Power of Attorney for client.

Case No. 11E-3006598, Client, 83-year-old low income, rural and Spanish speaking only man, who lives alone, sought assistance with preparing a Will and answering questions about Medi-cal. Attorney assisted client with completing a Will and provided him with brief advice and information in Spanish about the Medi-cal Estate Recovery Program. Attorney also referred client to the Medi-cal Counselor at the Area Agency on Aging.

Optional Information on
Collaboration with Other
Advocacy Groups

NOVEMBER 2011

Attorney attended the Legal Aid Association of California's (LAAC) Traveling Training program in Fresno, CA on November 9-10, 2011. Attorney is a member of the Senior Legal Service Providers (SLSP) Section of LAAC, which is a statewide network of legal professionals who work collaboratively with Area Agencies on Aging and senior citizens in their local communities. Section members were present from cities as far away as Bakersfield and Sacramento. SLSP held meetings to discuss an LAAC report titled Senior Legal Services Provider Training Assessment, current legal developments, and important resources available to senior advocates. There was also a presentation on civil and criminal perspectives of elder financial abuse.

PSA: 32

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

Fiscal Year: 2011-2012

Quarter: 2

Provider: Legal Services for Seniors

Counties: Monterey

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

Our client was jumped by a friendly neighborhood dog. And even though friendly, he outweighed our client by about 10 pounds, so shattering her left femur. Client had good insurance, most of her medical costs were covered, except for about \$8,000.00. Dog's owner would not pay so client (after consulting with a personal injury attorney who stated the claim was too small for the private bar) filed a small claims action and won. However, the defendant owner of the dog was a disbarred attorney from another state so he began a year-long series of continuances and court shenanigans ending up with an appeal to the Superior Court. Wanting to walk away from defendant's tactics, she came to LSS to get our advice. We stepped in to represent her in the Superior Court action. The defendant's attempts to bully our client out of her money were ground to a halt when our staff attorney Diana Leon prepared our clients case, presented a full day's bench trial on her behalf and won, again, our client's claim. If LSS had not been there to assist our client, the defendant would have successfully cowed our client into not proceeding with the trial which would likely have voided her small claims award and a disbarred, bullying attorney would have suppressed our client's right to a trial and return of money which the defendant rightfully owed her.

Optional Information on
Collaboration with Other
Advocacy Groups

LSS is working with CHISPA to expand outreach into East Salinas at Market Street senior housing complex. We provide legal consultations and assistance to HICAP clients. We host HICAP counselors bi-weekly in our LSS offices in Salinas and Seaside, providing them with private space to meet with their clients.

LSS has formed a "Central Coast Legal Aid Consortium," a loose affiliation of local legal aid members from the Watsonville Law Center, the Senior Legal Services of Santa Cruz, California Rural Legal Assistance and others. We plan to meet quarterly on topics benefitting our senior clients.

As before, we continue to provide legal counsel to the Alliance on Aging, The Homeless Coalition and other organizations – fostering a relationship with these organizations so that there's "no wrong door" for a senior to walk through in the County. Even though as attorneys we must guard our attorney-client privilege, when a senior needs legal help but asks for it at an Alliance on Aging office, the AoA knows who to call.

PSA: 33

Provider: Greater Bakersfield Legal Assistance, Inc.

Counties: Kern

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

None Stated

Optional Information on
Collaboration with Other
Advocacy Groups

None Stated