

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

**Fiscal Year: 2013-2014**

**Quarter: 4**

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**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**

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

Fiscal Year: 2013-2014

Quarter: 4

Provider: Legal Services of Northern California

Counties: Nevada, Placer, Sierra

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

April 2014  
None reported.

May 2014

The Mother Lode Regional Office's Disability Advocacy Program prevailed at an O.D.A.R. Hearing for a senior client who had been fighting to get on disability for almost 2 years. The senior client received a total back payment award of \$20,125, of which Placer County Health & Human Services was paid \$2,270 to recoup the General Aid funding which had been paid to the client. Our senior client will also receive future disability payments every month as well. This will aid in finding the senior client permanent housing, as the senior client has struggled with homelessness for several years.

June 2014

When Mr. C passed away, his widow was immediately bombarded by telephone calls from relatives offering to help. Mrs. C and her husband had not been in contact with her husband's relatives for many years. The calls became more insistent. One alleged relative even told Mrs. C that they would come and take her keys and remove her from her home. They alleged that she had followed his last directive against their wishes. Mrs. C was afraid and confused about her rights and responsibilities. A MLRO advocate was able to speak with Mrs. C when she first called the office, advise her of her rights, and formulate a plan for dealing with her husband's estate and his long-lost relatives. Mrs. C was offered a follow-up face-to-face meeting with a volunteer elder law attorney and warned of scams targeting recent widows.

Optional Information on  
Collaboration with Other  
Advocacy Groups

April 2014  
None reported.

May 2014

Cathy Meylor-Hooper and Windy Wertenberger attended a meeting of the Sacramento Organization of Social Security Claimant's Representatives at which the Roseville Field Operations Manager discussed communications with her office and filing claims.

June 2014

Cathy Meylor-Hooper and Wade Askew attended a meeting of the Placer County Legal Professionals Association in Roseville, CA at which the group was informed of the Mother Lode Regional Office programs.

Cathy Meylor-Hooper attended a Placer Seniors First luncheon at which the former director was honored for her work on behalf of seniors in Placer County and the new director was introduced to service providers. Members of the Board and staff were introduced and networked with participants.

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**Provider: Yuba Sutter Legal Center**

**Counties: Sutter and Yuba Counties**

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

Legal assistance hours for the quarter include 295.00 for Sutter County and 270.75 for Yuba County (565.75 total). Legal representation hours include 23.00 for Sutter County and 138.00 for Yuba County (161.00 total). Grand total of service units for the 4th quarter of FY 13/14 total 726.75 hours.

The community education activities were three for Sutter County with 6.50 hours and two for Yuba County with 5.00 hours (11.50 total).

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**California Legal Services (Title III B)**  
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Provider: Sacramento Senior Legal Services

Counties: Sacramento

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

A veteran living off on \$877/month contacted Senior Legal Hotline for help after a lender had made a clerical error in his home loan paperwork. As a result of the clerical error, the lender had demanded that the low-income veteran pay more than \$10,000 immediately or jeopardize the loss of his home. A Senior Legal Hotline volunteer attorney contacted the lender on the veteran's behalf, confirmed the mistake was due to the lender's clerical error and clarified the steps the veteran could take to remedy the situation while keeping the veteran housed given the veteran's very limited income. As a result of the Senior Legal Hotline attorney's intervention, the veteran is now on a payment plan and gets to remain his home.

A very low income senior contacted Senior Legal Hotline to ask if she would really go to jail if she wasn't able to pay on a \$1,500 debt. The senior was living off less than \$11,000 a year and was living with a relative as she was having difficulty securing safe, stable housing with her level of income. The Senior Legal Hotline volunteer attorney advised the senior of her rights and obligations, specifically informing the senior that she will not go to jail for being unable to afford to pay down a past debt. The Senior Legal Hotline volunteer attorney let the senior know that it is illegal for any debt collector to make such threats. In addition to advising the senior of her rights, the attorney sent the senior written information including a sample letter that that the senior could send. If it wasn't for the Senior Legal Hotline volunteer attorney's advice, the senior may have believed the unscrupulous debt collector's jail threat.

A veteran with disabilities contacted Senior Legal Hotline after he received an eviction notice. The veteran was interested in moving but, because of his disabilities, was unable to find housing and physically complete the move within the short time period required on the notice. The veteran was unable to contact the Senior Legal Hotline until very late in the eviction process. Nevertheless, a Senior Legal Hotline staff attorney stepped in and successfully represented the veteran, securing the veteran additional time to move and making sure an eviction did not appear on the veteran's record as an eviction would make it very difficult for the veteran to secure safe housing in the future. Thanks to the Senior Legal Hotline staff attorney, the veteran is now safely housed and has a clean eviction record.

Optional Information on  
Collaboration with Other  
Advocacy Groups

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

Fiscal Year: 2013-2014

Quarter: 4

Provider: Legal Services of Northern California

Counties: Yolo

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

Mrs. X, an 86 year-old woman on a fixed income, went to a work out to inquire about water aerobics classes recommended by her doctor. The facility staff promptly signed her up for a gym membership and had her meet with a personal trainer for 10 minutes. She signed a contract obligating her to pay large monthly payments for personal training and the membership fees. She did not understand what she was signing nor was the agreement explained to her. She became ill shortly after signing the agreement and was not able to use the services. She asked for a refund or cancellation and the company refused. She contacted LSNC for assistance. LSNC wrote a demand letter to the company and negotiated with their management for a full refund and cancellation of the agreement.

Client, a 72 year-old physically disabled renter, was served with a termination notice shortly after he complained about habitability issues in his apartment. He sought assistance at Legal Services after he was served with an eviction lawsuit. The client decided to move out because his poor relationship with the owner was causing him stress and exacerbating his health condition. Legal Services was able to postpone his trial and negotiate a settlement enabling him to vacate with additional time based on his health condition. The client was able to locate before he had to vacate from the rental and vacated as agreed.

Optional Information on  
Collaboration with Other  
Advocacy Groups

LSNC staff holds office hours at the following locations:  
Esparto: 1st Thursday of the month, every other month at RISE;  
West Sacramento: 4th Thursday of the month at the Senior Center;  
Knights Landing: 4th Tuesday of the month, every other month at Center for Families (formerly YFRC);  
Winters on the 1st Wednesday of the month, every other month at RISE;  
Davis on the 1st and 3rd Mondays of the month at Grace in Action (housed at Methodist Church).

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

Legal Representation: 52.40

Legal Advice/Assistance: 184.40

Community Education: 2.80

Special Outreach: 15.90

Total Hours: 255.50

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PSA: 5

Provider: Legal Aid of the North Bay

Counties: Marin

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

A 70-year-old man came to our unlawful detainer clinic seeking assistance with a 60-day notice to terminate his family's tenancy at an apartment complex in Novato. Our client lives with his wife, who is also a senior, his adult disabled nephew, and his niece. The family had been living there for approximately 15 years. Both our client and his wife have also been diagnosed with several physical disabilities and medical conditions. The 60-day notice alleged that the tenants "refused to maintain the apartment in a safe living situation." The tenants denied that this was the case, and informed me that the city of Novato had just inspected their unit weeks before they came to our office and found no safety problems in the home. LAM worked with the city of Novato code enforcement inspector and Fair Housing of Marin, and drafted a letter to the landlord. LAM informed the landlord that the city had been to the unit and found no safety problems and I requested that the 60-day notice be rescinded as a Reasonable Accommodation, since both our client and his wife are seniors and significantly disabled. After a letter and a few phone calls with the landlord's agent LAM was able to get the notice rescinded and the family was allowed to remain in their home.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

PSA: 6

Provider: Asian American Advancing Justice -Asian La ~~in Contra~~ Counties: San Francisco

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

A low-income Vietnamese family received an owner move-in eviction notice in October 2013. The parents are disabled and receive SSI, and they have lived in their Inner Sunset 2-br rent-controlled unit since 2001. We took their case and argued that the parents were fully protected under the Rent Ordinance due to their disability and length of residency. Landlord's counsel disputed this claim, and we were prepared to defend against the eviction in court. However, the landlord balked, and the case remained in limbo for several months. In April, the landlord relented and asked for the tenants back rent, which effectively serves as a rescission of the landlord's eviction notice. The family has an appointment to hand-deliver the back rent to the landlord, after which they will no longer be under threat of displacement.

Optional Information on  
Collaboration with Other  
Advocacy Groups

None to report for this quarter.

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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

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

April Client: : A Spanish speaking senior sought legal help at our Senior Law Clinic because she received a rent increase on her Section 8 housing contract due to disparities in her caretaker's income. We helped the client connect with her public housing agency (PHA), who requested that our client come in to the San Francisco Housing Authority to dispute the reported income, with pay stubs for the caretaker. We helped to set up an appointment between our client and her PHA and confirmed that her rent was decreased after the pay stubs were updated.

May Client: A monolingual Spanish speaking senior came to one of our Senior Law Clinics looking for help to enforce her settlement judgment against the healthcare provider Sutter Health. Our client won a case in the Small Claims Court after the hospital lost her dentures while undergoing surgery. However, months after her judgment, she was still not paid compensation for her lost dentures. We helped the client by writing a demand letter to the General Counsel demanding a settlement check of \$2,500. Within two days of receiving our letter, the General Counsel satisfied the judgment and sent the client a check for \$2,500.

June Client: A monolingual Spanish speaking client came to our office because she needed help filling out an application from the Employment Development Department (EDD). She had injured her right hand and was receiving Worker's Compensation benefits; however, when that ended, she needed assistance from EDD but was unable to fill out the application because it was in English. We filled it out for her and with our help she was granted EDD benefits for 2014.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We had a very active Sprint 2014. We provided presentations and Q&A sessions on public benefits, housing, consumer fraud and estate planning for a diverse group of seniors including Latinos, Asians and Afro-Americans.

We continue to actively participate in the Latino Partnership with monthly meetings at the 30th Street Senior Center where we share point of views and talk about common issues. Likewise, we keep collaborating with the Senior Rights Bulletin by providing pertinent articles for seniors and providing proofreading and editing for the Spanish version of it.

Finally, we still collaborate actively with the Legal Aid Association of California, Senior Law Chapter in both the Steering Committee and the Languages Access Committee.

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**Provider: Legal Assistance to the Elderly**

**Counties: San Francisco**

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

Client is a very low income African-American senior, who lives in a single room occupancy hotel South of Market. Client was sued for non-payment of two month's rent. He maintains that he was never served. Our attorney obtained a stay and convinced the landlord to accept rent and dismiss the case.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We have participated in a conference call convened by the Legal Aid Association of California focusing on changes in reporting requirements being contemplated by the Legal Services Trust Fund of the State Bar of California. These changes will require IOLTA funded services to report short-term outcome data to the Bar and will necessitate modifying the data base programs being used by most legal services.

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Provider: **Nihonmachi Legal Outreach dba API Legal O Outreach** Counties: **San Francisco**

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

Case Example 1:

Our staff attorney took on a case involving a Cantonese monolingual speaker who is elderly and has disabilities (dementia, etc.). The client's caseworker already submitted an N-400 application, and client already passed the interview. But the oath taking appointment was rescinded on some technical ground (some box was not checked on the N-648).

Prior to the re-submission of the naturalization application and the disability waiver application, our attorney saw that there was past detention that was not disclosed in the earlier N-400 application that was initially submitted. She submitted a new N-400 and N-648 where she made the correction and documented the inadvertent error on the part of the caseworker.

Our attorney appeared at the interview, where client was asked about the detention issue (detention was a 5150 detention stemming from some argument with his former roommate). The Client answered the first couple of questions (with factual accuracy, based on what we can glean from the police report). After a couple of questions, client responded saying that he no longer remembers what happened. At this point, we objected to the line of questioning, cited to the N-648 indicating client's memory problems and dementia, and provided a police clearance from SF indicating that client had no criminal record.

The interviewer, after conferring with his supervisor, told the client to sign some papers about the interview. We objected to him signing the papers, especially given his difficulty in recalling the details of the incident. (We also suspected that they might use this signed statement as a basis for alleging misrepresentation or false testimony). Client did not sign the papers. We were then dismissed.

We were later notified that the client's N-400 application was denied and that client is barred from having good moral character because of his "false testimony" at the interview. Our attorney appealed the N-400 denial. She wrote a strong brief. We wrote a factual declaration about what had happened.

The denial was overturned. The client recently completed his oath taking ceremony. He is now a U.S. citizen.

Case Example 2:

Our client, an elderly woman, was trafficked for almost nineteen years by her sister into housekeeping work. Our agency assisted her in obtaining legal status and reporting her case to local and federal law enforcement. We also worked with the client to ensure that her benefits were triggered and that her subsequent immigration status was recognized so that she could obtain appropriate state-sponsored housing and much needed medical services.

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Optional Information on  
Collaboration with Other  
Advocacy Groups

API Legal Outreach has provided outreach presentation to various community groups on housing, elder abuse and disability rights with Alexander Hotel, Jackie Chan Senior Center, Self Help for the Elderly.

In addition, with the increase in Naturalization needs, our office has participated actively with other advocacy to provide legal representation in this area for seniors.

**PSA: 7**

**Provider: Contra Costa Senior Legal Services**

**Counties: Contra Costa**

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

Staff at CCSLS assisted a 77 year-old woman of color preserve and maintain her low-income housing at t senior complex. The elderly and frail tenant had previously obtained a permanent domestic violence restraining order against her adult son. The manager was attempting to hold the senior accountable for her son's actions (he kept trying to visit the senior at her home). This office assisted the client by contacting the property manager by phone and in writing and explaining that tenants who are victims of domestic violence have additional protections to their tenancies and that this senior tenant can only seek to enforce her valid restraining order to the extent that she is aware of the violations. The manager did not continue to pursue a termination of the senior's tenancy.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We have worked with a number of different agencies this quarter, including Senior Peer Counseling, Senior Outreach Services, and APS. We have also attended committee meetings of AAA and held discussions with JFKU regarding partnerships in future projects.

**PSA: 8**

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

**Quarter: 4**

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

**Counties: San Mateo**

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

Mr. G is a 61-year-old man who came to Legal Aid after he found out he was going to be terminated from SSI because of property he owned outside the U.S. The stress of this had exacerbated his already significant mental health issues. He could not afford to live without his SSI, but he was so debilitated that he was having a hard time figuring out how to fix the problem. Legal Aid worked with Mr. G to understand the steps involved in regaining SSI eligibility and got him onto conditional benefits while he sold his property. Mr. G's full income was restored while he worked to correct the underlying cause of the termination. Without Legal Aid, it is very likely this client would have lost his benefits and simply tried to live without this desperately needed income.

Optional Information on  
Collaboration with Other  
Advocacy Groups

During the last quarter, the Legal Aid Society helped plan and participated in two workshops about elder abuse prevention facilitated by Theatre of the Oppressed. The workshops were a great success and brought a variety of stakeholders together for a meaningful exploration of the participant's experience with elder abuse and elder abuse prevention. We are now working as part of the Adult Abuse Prevention Committee to continue this work and to bring it to a larger audience. We continued to work with the Legislative Committee to see if there are systemic advocacy initiatives that we should support and encourage others to support.

**PSA: 9**

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

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Provider: Legal Assistance for Seniors

Counties: Alameda

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

Client is an Alameda resident and was referred to Legal Assistance for Seniors (LAS) by Alameda County Adult Protective Services. Client's son was living with him and getting increasingly paranoid and aggressive towards client. Son was staying up all night, yelling and talking to himself and on drugs. When the client would ask him to keep it down and/or leave the house, Son would refuse. Son also threatened to kill Client many times.

One night Son called Alameda Police stating that he had a number of explosives and that he was going to use them. Alameda Police traced the phone number back to client's home. Client awoke to chaos as Alameda Police entered his bedroom trying to find the explosives. Son was arrested and taken into custody.

While he was in custody, Legal Assistance for Seniors (LAS) attorney did a home visit and filled out the paperwork for Client to obtain protection before Son was released. LAS obtained temporary protection for three weeks in case Son was released from custody. Son was in custody and present at the hearing for permanent restraining order. LAS attorney represented Client in the contested hearing and obtained a 3 years elder Abuse or Dependent Adult Abuse Restraining Order for client.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Assistance for Seniors (LAS) works closely with 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 also maintain collaborative relationships with the State Bar of California and the cities of Fremont, Hayward, Livermore, 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)**  
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**Quarter: 4**

**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 4th Quarter of 2013-14, SALA provided on-site legal service intake appointments at 22 senior centers or sites in Santa Clara County. These sites included: These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center (San Jose), Seven Trees Center (San Jose) Eastside Senior Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.  
Participation on Local Task Forces  
For the 4th Quarter of 2013-14, SALA attorneys also participated in the April and June meetings of the Elder Abuse Task Force of Santa Clara County and the May meeting of the Santa Clara County Hoarding Disorder Task Force.

**PSA: 11**

**Provider: Council for the Spanish Speaking**

**Counties: San Joaquin**

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 12**

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**Quarter: 4**

**Provider: Catholic Charities Diocese of Stockton**

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

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

None Stated this Quarter

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated this Quarter

**PSA: 13**

**Provider: Senior Citizens Legal Services**

**Counties: Santa Cruz & San Benito**

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

SCLS continued to provide high quality legal services to seniors who need adequate healthcare, housing, and income. The Third Quarter Report indicates that SCLS is on target to meet all of its contract goals in this regard.

SCLS continued in the 5th Quarter of a six Quarter grant collaboration with Watsonville Law Center, Legal services for Seniors (Monterey County), and Community Actions Board in implement the "Home Again" grant program helping Santa Cruz seniors to secure stable income and housing now and into the future.

SCLS represented two separate Seniors in receiving Elder Abuse Restraining Orders against parties. One was a daughter who was abusive and threatening the senior and her grandson who the client is the guardian. The second was protecting a client from an abusive son who was collecting rent from renting out the client's room in the clients home as the clients was away visiting southern California for two months. This restrained son had moved his father's possessions into a trailer on the property and locked the client from his own home. SCLS was able to get the client a restraining order and return control of his home to the client.

Optional Information on  
Collaboration with Other  
Advocacy Groups

SCLS collaborated this quarter with Ombudsman and Adult Protective Services and Meals on Wheel program to run an education on Elder Abuse for participants at a remote county location. This collaboration will continue at various other locations in the future.

**PSA: 14**

**California Legal Services (Title III B)**  
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**Provider: Central California Legal Services, Inc**

**Counties: Fresno & Madera**

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 15**

**Provider: Central California Legal Services, Inc.**

**Counties: Tulare**

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

Senior client sought legal assistance after getting notices from the Department of Treasury regarding withholding from her sole source of income, Social Security, for a delinquent federal education loan. Client was worried that she would be harassed if she contacted her loan provider and that, she would no longer be able to support her grandson with the withholding. Advocate reached out to the appropriate department at the Department of Treasury and discussed client's situation. After many conversations with Treasury and filling out applicable paperwork, client is currently receiving her full Social Security income.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Last quarter, many CCLS attorneys attended the ombudsman recognition and training luncheon in Fresno, of which the organization was a co-sponsor. Additionally, CCLS advocates participated in the Legal Aid Association of California's Model Approaches to Serving Seniors meeting, which was held at the CCLS office in Fresno. The meeting kicked off with breakfast and discussion among Senior Legal Services Providers of LAAC, including CCLS attorneys. In May, CCLS hosted its annual Elder Abuse Prevention Roundtable conference in Fresno. CANHR also held an attorney training on long-term care issues in Burbank in May, and many CCLS attorneys attended and collaborated with others during that day-long event. Furthermore, to help connect with others and stay on top of legal issues in the senior community, one of the Visalia office attorneys became a member the Tulare-Kings Estate Planning Council, as well as the nationally recognized National Academy of Elder Law Attorneys. Both groups held meetings during the quarter, in which she actively collaborated with other local and statewide advocates.

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Provider: Central California Legal Services, Inc.

Counties: Kings

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

Senior client, whose wife had passed away, sought legal assistance with tracking down more than \$15,000 that went unaccounted for in his wife's IRA, of which he was beneficiary. He had been given the runaround from the bank that held the IRA funds every time he tried to get information from them. His son, noting that his father was having restless nights over not knowing what had happened to their funds, had also tried to talk with the bank, but the bank cited third-party privacy laws and claimed it was not able to further help client. Advocate contacted the bank to speak with its in-house counsel and discuss laws governing marital property and IRAs. After some discussion, bank management finally agreed to provide client information he is requesting.

Optional Information on  
Collaboration with Other  
Advocacy Groups

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PSA: 16

Provider: California Indian Legal Services

Counties: Inyo & Mono

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

PSA: 17

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Provider: **Central Coast Commission For Senior Citize** Counties: **San Luis Obispo**

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

One of our volunteers (retired judge) helped a client who was facing foreclosure. She ended up successfully selling her house and getting some equity out of it. The volunteer spent many hours working with this client and she wrote the following, "I was facing foreclosure. My adult, financially able children refused my cry for help.  
I was fortunate to have your volunteer on my case. My profound gratitude and appreciation for his service. My trust in him is beyond words."  
Helped a disabled senior obtain a reverse mortgage to avoid foreclosure.  
The husband of a senior lady died after 20 years of marriage. His daughter from a previous marriage filled out the death certificate and omitted her, precluding her from getting social security benefits. By negotiating with the daughter and submitting the necessary paperwork, the benefits were reinstated retroactively.

Optional Information on  
Collaboration with Other  
Advocacy Groups

The Project Director attended the Adult Abuse Policy Council, and met with the Executive Director of Legal Services for Seniors of Monterey County for networking and advice.

**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**

Counties: **Los Angeles**

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

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**PSA: 20**

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Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

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

Case Story 14E-7004075:

The client, an 83 frail senior, contacted ICLS requesting assistance regarding a Hearing she was required to attend with the Labor Commission on May 13, 2014. She had been employed for 29 years as a nutritionist for a non-profit organization and when operations were shut down at her branch office, her employment was terminated. When she was laid off Upon termination the client received payment for wages and unused vacation time. She disputed the unused vacation pay as she only received compensation for 120 hours when she believed that she had accrued over 240 hours of unused vacation time. The client filed a Complaint with the Labor Commission and tried to negotiate a settlement with her previous employer with no success. ICLS advocates then represented the client at her Labor Commission Hearing. The decision received by the hearing officer was fully favorable to the client, finding in her favor and awarding the following: \$6,495.25 consisting of \$1,889.48 for unpaid vacation time, interest of \$183.77 and \$4,422 for additional wages for employers' failure to pay all of client's vacation time upon termination, as a penalty under Labor Code section 203.

Case Story 13E-7006684:

An ICLS client was losing her home due to non-payment of homeowner association (HOA) fees. A Notice of Default had been recorded. The client had suffered a stroke some years ago and her daughter, who was living in her home, did not pay the HOA fees. The client was being billed for over \$23,000. The HOA waived \$16,550. The ICLS advocate negotiated a payment plan for the client for the remaining \$7,107.06 but the client was able to come up with the entire balance to avoid paying any interest. The client was able to save her home and is now current with the HOA fees.

Case Story 14E-7004974:

An ICLS advocate received a call from the management of a senior apartment complex requesting legal assistance for an 89-year-old resident who had been served with a "Notice of Lease Violation" informing her that she had to move out by June 7th for nuisance. On several occasions, the client had been heard making racial remarks and had been seen marking and writing on postings at the apartment complex. When a complaint was made that the client had assaulted and threatened one of the residents, management had no other alternative but to serve the client with a "Notice of Lease Violation". After speaking with the client, who denied any and all allegations, claiming that the apartment manager didn't like her and wanted her out, I agreed to assist her with negotiating on her behalf and the follow day and ICLS attorney and I met with the client and the apartment manager. During the meeting, the client denied any wrongdoings and stated that she had only tapped the resident on the shoulder and never threatened her. The apartment manager informed ICLS staff that the client's behavior has been a problem for years; the client disrupts meetings and gatherings by making racial remarks. The manager then provided ICLS staff with numerous letters and notes that the client had written to and about some of the other residents. After reading several of them, the ICLS advocates advised the client that even though she had a right to her own opinions and views, she did not have the right to interfere with the rights of others; her comments are both insulting and hurtful and should be kept to herself. The client insisted that she meant no wrong and was only expressing her feelings; she didn't want to move and had

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no place to go. The ICLS advocates advised the client that if she did not move out by June 7th an Unlawful Detainer would be filed against her and that her behavior would not be tolerated by any other apartment complex. The client agreed to change her behavior and the apartment manager agreed to give her another chance. The client was relieved and grateful to ICLS for assisting her in getting another chance.

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)

None

Optional Information on Collaboration with Other Advocacy Groups

None

**PSA: 22**

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

**Counties: Orange**

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

We recently represented a senior seeking a limited conservatorship over her daughter, who is developmentally disabled. The daughter required surgery, but lacked capacity to consent to the surgery. The client, who spoke Korean, did not fully understand the court process and her hearing had been continued several times because she was unable to correct errors made in the pleadings that she prepared. The court suggested the client speak with a Legal Aid attorney, who was present in court on a different case. We were subsequently able to resolve the legal issues and obtain the conservatorship at her next hearing.

Optional Information on Collaboration with Other Advocacy Groups

During this quarter, we have participated in several meetings with the court, service providers, law schools and private attorneys regarding elder abuse restraining orders. We hope to establish 2 weekly elder abuse clinics to be held at the court, commencing in the spring. The Elder Abuse Restraining Order Clinics will utilize law students and volunteer attorneys, coordinated by Legal Aid, to provide assistance to self-represented litigants with preparing declarations and restraining order pleadings.

**PSA: 23**

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**Provider: Elder Law & Advocacy**

**Counties: San Diego**

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

The senior who is low-income moved out of the apartment after providing management with notice and did not receive a return of the senior's prorated rent. Unfortunately, the property management company was unresponsive and ignored the senior. Our attorney reviewed the documentation that senior received upon vacating the apartment and the attorney sent a demand letter to the property management company. The senior then received the full, prorated rent of \$175 and the senior was very grateful for our assistance.

Optional Information on  
Collaboration with Other  
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

**PSA: 24**

**Provider: Elder Law & Advocacy**

**Counties: Imperial**

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

A 79 year old, disabled low-income senior was sued by a debt collection legal firm over a very vaguely described debt of \$9,500. The senior received service roughly 30 days prior to contacting us. The senior had not taken any action on the case because the senior was unaware of any such debt and was at a loss as to the source of such a sizeable debt. Our attorney arranged to meet with the senior in person the next day, and checked the case file with the court, which showed no motion for default judgment yet filed by the debt collection legal firm. After meeting with the senior, the attorney prepared answers regarding related proof of service documents. The attorney suggested that the senior challenge the complaint on the grounds of lack of specificity and denied the complaint generally. No further action has been taken or filed on the case after the senior followed our attorney's suggestion, so it appears that the debt collection legal firm may have abandoned their attempt to collect. The attorney was able to provide legal services for which it saved the senior from a \$9,500 default judgment.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Not Applicable for this Quarter.

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**Provider: Bet Tzedek**

**Counties: Los Angeles County**

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 26**

**Provider: Legal Services of Northern California**

**Counties: Lake and Mendocino**

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 27**

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Provider: Council On Aging

Counties: Sonoma

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

We contacted the mobile home park manager and park owner on behalf of a client residing there regarding safety issues stemming from a neighbor encroaching on public and private walkways with unpermitted barriers, in violation of Sonoma County planning department guidelines. This resulted in a safety issue for client who was not able to use her walkway. The barriers have since been removed to create a safer environment after bringing the issue to the attention of the park manager, neighbor and park owner.

Optional Information on  
Collaboration with Other  
Advocacy Groups

- 1) Worked with Linkages and APS to provide estate planning services, landlord tenant assistance and Social Security consultation/advocacy for clients.
- 2) Attended CANHR - webinar "Nursing Home Admissions Agreements: A discussion of the Unfair Terms in the Agreements Presented to Elders".
- 3) Attended National Senior Citizens Law Center - webinar "California's Coordinated Care Initiative (CCI)".
- 4) Attended Webinar - Caring for Someone with Alzheimer's - Family Caregiver Support Series, Sponsored by Home Instead.
- 5) Worked with "2ndChance4Pets", a non-profit agency dedicated to ensuring that the companion animals of estate planning clients are provided for in the event the client is incapacitated, dies, or is otherwise no longer able to care for the animal.
- 6) Met with Ronit Rubinoff, Director of Legal Aid of Sonoma County, to discuss our respective services and how we can best partner together.
- 7) Worked to create a drop-in, donation based legal clinic at Council on Aging office, beginning in September 2014.
- 8) Reached out to the Educating Senior Project of the California State Bar Association to obtain resources and new means to educate seniors on fraud prevention.
- 9) Reached out to the Jewish Community Free Clinic to set up regular estate planning seminars and a free Advance Health Care Directive workshop.
- 10) Reached out to the Sonoma County YMCA and set up an estate planning workshop scheduled for October 2014.

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Provider: Legal Services of Northern California

Counties: Solano

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

1. A landlord filed an eviction against an elder couple because of alleged damage to the property and drug use. However, the facts did not support the allegations and it appeared that the landlord filed this eviction in retaliation for the couple's complaints about bed bugs and leaks in the apartment. The management ignored the complaints, causing the couple to live in substandard conditions. LSNC challenged the eviction on procedural grounds.

The judge ruled in favor of our clients and dismissed the eviction. Due to LSNC's advocacy the couple remained in their home, and their landlord no longer harasses them. Most importantly, the couple can now find a habitable dwelling without the burden of having an eviction on their record.

2. The Social Security Administration terminated a widow's Supplemental Security Income (SSI) benefits because she was allegedly over the income limit. The client had recently moved to Solano County after her husband died in order to live with her daughter. The client has cognitive disabilities and uses a wheelchair. Due to the termination, the client and her family endured a tremendous financial and emotional strain. The family could no longer afford to pay for her medical treatment and her basic needs such as food and clothes.

LSNC represented the client at a hearing, and presented evidence showing that SSA incorrectly calculated her income. SSA corrected its mistake and reinstated her SSI. Also, the client received 4 months of back pay for the months that she did not receive benefits. As a result of our advocacy, the client can now afford her basic necessities and medical treatment. Most importantly, the strain on her family has been lifted.

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: 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 of Napa Valley continues to work with One Justice to provide free legal services in the area of estate planning. The clinics are four hours long and we are able to prepare and notarize Power of Attorneys for Finance and Health Care Directives. We also obtain information to prepare simple wills. On June 30, 2014 we were able to assist 38 seniors, with the majority being low income.

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**Provider: Senior Legal Services**

**Counties: El Dorado**

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

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 30**

**Provider: Dor v' Dor Senior Advocacy Network**

**Counties: Stanislaus**

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

Settled Elder Financial Abuse Case involving financial abuse of a gentleman with Alzheimer's Disease by his girlfriend who then died leaving all of his finances to her children. Successfully negotiated a settlement whereby Senior would receive monthly income from a special trust set up so that he could live at the same level he was used to prior to being placed in the assisted living facility.

Successfully negotiated the return of money from a major bank for a senior whose credit card was used by unknown persons. She reported it missing to the bank but bank did not cancel card, just issued a new one. The Card was then used for up to \$20,000 by the unknown person who spent \$20,000. The bank agreed to return 75% of the money taken.

Contacted debt collector on behalf of client who was judgment proof. Collector agreed to dismiss lawsuit that was filed.

Optional Information on  
Collaboration with Other  
Advocacy Groups

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

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Provider: Central California Legal Services

Counties: Merced

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

APRIL

CCLS Case No.: 14E-3001041:

CCLS received a call from Client, an 80-year-old Merced resident, who has complained about her hearing aids purchased from Miracle Ear in Modesto. Client claims that the hearing aids never worked, and that the Modesto shop refuses to accept a return of the hearing aids. After reviewing the facts and documents presented by Client, Attorney concluded that Client was entitled to a refund under both the terms of the Purchase Agreement and California Law. Attorney then contacted both Miracle Ear Consumer Affairs and the franchise owner of the Modesto shop, demanding that the contract be rescinded. The Modesto shop has since ceased its debt collection attempts against Client while it evaluates the circumstances surrounding her case. Attorney is willing to undertake litigation against all parties involved (West Coast Hearing LLC, Sears, and other individuals) if Client's money is not refunded. Attorney is currently working with Sen. Canella's office in Merced to put pressure on the hearing aid franchise owner to capitulate, which would obviate the need for litigation.

CCLS Case No.: 14E-3001723:

CCLS received a call from Client, a 62 year old, limited English-speaking Livingston resident without any transportation, who requested estate planning advice and a will. Attorney and Spanish speaking assistant travelled to his home in Livingston, counseled him on his estate planning options, assisted him in completing his will, and acted as witnesses to it.

MAY

CCLS Case No.: 14E-3001968:

CCLS was contacted by Client, a 63-year-old Atwater woman, who complained of violent physical elder abuse by her daughter. Client told Attorney that she didn't feel safe, and that she needed her daughter out of her home immediately. Attorney met with Client the next day, and found that Client had called the police to come out several times, each time telling her there was nothing they could do without a court order. Attorney also learned that Client has custody of abuser's teenaged daughter. Attorney interviewed client and prepared all documents needed for a temporary elder abuse prevention restraining order protecting both Client and her granddaughter, and requiring abusing daughter to move out of the home. After it was granted, Attorney had the order served on the abuser by the Sheriff, and counseled Client on how to represent herself at her hearing to make the order permanent. Client prevailed at the hearing, and was granted a permanent protective order.

CCLS Case No.: 14E-3001983:

CCLS was contacted by Client, a 62-year-old Merced man, who claimed that he and his family were being harassed by her drug-addled stepdaughter. Client informed Attorney that Merced Child Protective Services had given custody of the stepdaughter's three children to him and his wife and that they all lived in the home together. Client claimed that the stepdaughter would periodically appear at the family

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home and demand money while banging on doors and windows, and shattering glass bottles in their driveway. Attorney interviewed Client and prepared all documents needed for a temporary civil harassment restraining order prohibiting his stepdaughter from setting foot within 100 yards of the home or any household member. After it was granted, Attorney had the order served on the abuser by the Sheriff, and counseled Client on how to represent himself at her hearing to make the order permanent. Client prevailed at the hearing, and was granted a permanent protective order.

CCLS Case No.: 14E-3002029:

CCLS was contacted by Client, a wheelchair-bound 62-year-old Atwater woman, who said she was being sued by a debt collector for about \$500. This immediately sounded odd to Attorney, who had never seen a collector sue for such a small amount in California. Attorney reviewed the documents served on Client and decided to defend her in the lawsuit, knowing that it would be uneconomical for the other side to pursue a case. Weeks later, counsel for the debt collector dismissed the lawsuit.

CCLS Case No.: 14E-3002029:

CCLS was contacted by Client, a 63-year-old Los Banos woman who spoke only Spanish. Client told Attorney that she felt unsafe in her apartment, and that her subtenant had become belligerent and abusive. When Client asked her abusive subtenant to leave, she threatened to have Client arrested and thrown in jail for "fraud" if she tried to remove her. The Client was scared, and did not involve the authorities until after the subtenant stopped paying rent, and began stealing client's food and personal items. Attorney interviewed Client and prepared all documents needed for a temporary elder abuse restraining order, agreeing to represent Client in court as needed on account that she did not speak English. Attorney filed documents with the court and, the requested order was granted. Client then notified the subtenant and showed her a copy of the signed order. Rather than involving the Merced Sheriff to enforce the order, Subtenant agreed to leave the premises voluntarily. No further court action was necessary to achieve Client's goals.

CCLS Case No.: 14E-3002422:

CCLS was contacted by Client, a 102-year-old Los Banos woman who was then a patient at Los Banos Nursing & Rehabilitation Center. Client told staff that he needed an attorney to come out and assist her with changing her Will and making a Durable Financial Power of Attorney. Attorney drove down to the nursing home in Merced, met with Client, and assisted her with making and executing a new Will, and in preparing her Durable Financial Power of Attorney.

JUNE

CCLS Case Nos. : 14E-3001785 & 14E-3001782

CCLS was contacted by Clients, a 72-year-old Dos Palos man and his spouse. Clients live in a mobile home near a house that they own on the same property. Clients complained of that their son and his girlfriend had moved into the home without permission, and that they were selling illegal drugs out of the location. When Clients asked the son and girlfriend to leave, they refused. Clients' son told his parents "You want me gone? Try to evict me then." Clients are elderly and live 45 minutes from the courthouse, are completely unfamiliar with the complex eviction process, and had no resources with which to hire a

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Optional Information on  
Collaboration with Other  
Advocacy Groups

private attorney. Clients had intended to rent the house out to family members as an income to supplement their social security. Attorney agreed to represent Clients in an Unlawful Detainer (eviction) lawsuit against their son and his girlfriend. Attorney drafted eviction notices and had them served on the son and his girlfriend. After the expiration of their time to move out, requested and obtained a waiver of court costs, and then filed an eviction lawsuit in Merced Superior Court and had it served on defendants. After defendants refused to respond to the lawsuit or vacate the premises, Attorney requested and obtained court order directing the Sheriff to remove defendants from the premises. Defendants no longer live on the premises.

APRIL

On April 18, 2014, Attorney was joined by CCLS's Executive Director and Merced Foreclosure Expert in attending the swearing-in ceremony of newly-appointed Judge Paul Lo, the first Hmong-American judge. Also in attendance were his associate Judges, Mayor Thurston, several members of the Merced Bar, as well as representatives from Merced HSA, Sen. Canella's Office, United Way of Merced, as well as some former clients. Attorney and Executive Director met with private attorneys and community members spoke about CCLS services.

MAY

On May 14, 2014, Attorney was joined by CCLS's Merced Health/Benefits Advocate in attending the annual Merced Senior Recognition Day. Attorney and Advocate met with seniors and distributed information about the Free Legal Services for Seniors program, as well as other CCLS programs that may be of interest to Merced Seniors. Attorney also met Merced AAA, HICAP, and LTC Ombudsman staff.

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**Provider: Legal Services for Seniors**

**Counties: Monterey**

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

This past quarter we began quarterly joint meetings with the two other local legal aid organizations in the Monterey Bay area to keep in touch with them on how we can better serve our joint clients in the Greater Monterey Bay area.

Our first meeting on June 23rd included a three-hour disabilities law presentation to the group by Linda Kilb of the Disabilities Rights and Education Defense Fund (DREDF). It is our group's intent to continue to feature an all-day meeting with staff legal discussion in the morning and educational sessions in the afternoon.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Services for Seniors continued to collaborate with the Alliance on Aging, the Area Agency on Aging, Watsonville Law Center and other agencies and organizations.

**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