

The Aging Population of Orange County, California and its Impact on Court Services



Institute for Court Management
ICM Fellows Program
May 2012

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ACKNOWLEDGMENTS

I would like to thank the leadership of the Orange County Superior Court for allowing me to experience this wonderful journey. I would like to particularly acknowledge Alan Carlson, Chief Executive Officer; Teresa Risi, Chief Operations Officer; and Directors of Operations Cherie Garofalo and Lori Myers, who collectively have been steadfast in their commitment to ensuring professional growth for the management team.

I would like to thank my advisor, Dan Straub, for his generous gift of time, patience, and understanding.

Additionally, I very much appreciate the assistance and expert advice of our Collaborative Courts Officer, Paul Shapiro.

Lastly, to my family, for the encouragement and unconditional love, I thank you from the bottom of my heart.

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ABSTRACT

The statistics are compelling. According to the U.S. Census Bureau, more than 40 million baby boomers had reached the age of 65 by the end of 2010. With more people 65 years and older than in any previous census, the growth is unprecedented. In 2030, the number of Americans aged 65 and older is projected to reach more than 70 million. In Orange County, California, while it is estimated that there were approximately 360,000 individuals 65 years of age and older in 2010, it is projected that the County's older population will increase 94% by the year 2030.

With the increasing numbers of the elderly in the county, it is imperative that the impact on court services in the coming decades be identified and examined. Orange County Superior Court's mission is to "serve the public by administering justice and resolving disputes under the law, thereby protecting the rights and liberties guaranteed by the Constitutions of the California and the United States". It is this very principle that is the impetus for this study. The court needs to ensure that all persons who come before the court have equal access to justice. The study focused on addressing the following research questions:

- What is the projected increase in the caseload involving elders?
- What court programs are we offering now for elderly court users?
- What best practices, techniques, and programs have been implemented by other courts for elderly court users?
- What court programs can we implement to better serve the elderly?

Research findings include information and analysis from two methods of data collection. First, the analysis of data extracted from the three case management systems that the Court currently uses; and second, compilation and analysis of the results from three surveys distributed to key personnel and program managers from California courts that have implemented programs or initiatives for the elderly.

The key findings of the study are: 1) case-filing trends reflect a continuing increase in the Court's workload; 2) Orange County Superior Court currently provides services for the elderly, but a more comprehensive response is needed in order for the Court to meet the anticipated increase in workload; 3) Elder Court initiatives have been implemented successfully in a number of courts; 4) there is a need to develop a training curriculum for court personnel to ensure that the needs of the elderly are identified and met.

Orange County Superior Court (OCSC) must take necessary proactive steps to ensure that we meet our mission and goals – that all persons will have equal access to the courts, court proceedings, and programs.

INTRODUCTION

Orange County Superior Court's mission is to "serve the public by administering justice and resolving disputes under the law, thereby protecting the rights and liberties guaranteed by the Constitutions of California and the United States of America". (Orange County Superior Court, 2011, October) It is this principle that is the impetus for this study. With the growing elderly population in Orange County, it is imperative that the impact on court services in the coming decades be identified and examined in order for the Court to prepare, so as to ensure that the needs of all persons who will need the services of the court are met – most especially the vulnerable segments of our society such as the elderly, who may have difficulty participating in the judicial system. Orange County Superior Court can take necessary proactive steps to ensure we meet our mission and goals – that all persons will have equal access to the courts, court proceedings, and programs.

The statistics are compelling. According to the U.S. Census Bureau, more than 40 million baby boomers had reached the age of 65 by the end of 2010. With more people 65 years and older than in any previous census, the growth is unprecedented. In 2030, the number of Americans aged 65 and older is projected to be more than 70 million and will comprise 20% of the U.S. population. (U.S. Census Bureau, 2011)

In Orange County, while it is estimated that there were approximately 360,000 individuals 65 years of age and older in 2010, it is projected that the County's older population will increase by 94% by the year 2030, compared to a 15% increase among

all ages, and in addition experience a significant shift in diversity. (Orange County Community Indicators, 2011, p. 6) Racial and ethnic minorities are the fastest growing segment of the older population in the United States, with minorities presently representing about 18% of the population 65 and older, and this segment projected to account for 40% by 2050. (Fritz, C., 2005, p.1) During the past 10 years, Orange County became a “minority majority” county, in which the non-Hispanic white population no longer comprised more than 50% of the county population. (Orange County Community Indicators, 2011, p.5) It is anticipated that this demographic shift will result in an increased demand for many kinds of services, including the services of the courts.

Orange County Superior Court is one of the 58 trial courts in the State of California. In the 1960’s, Orange County’s population reached the million mark. The City of Santa Ana and the County moved aggressively to build a court house that would meet the needs of the growing population of the county, and an eleven-story court house was built and completed in 1968. (McDewitt, R., 2011, p. 298)

Today, Orange County Superior Court consists of eight separate court facilities, including a Community Court that houses specialized court calendars such as Drug Court, DUI Court, and Veterans Court. The Superior Court has jurisdiction over all Civil and Small Claims cases, as well as all Criminal, Juvenile, Family Law, Probate, Mental Health and Traffic infraction matters.

Orange County Superior Court has a complement of 114 judges, 23 commissioners, and 1,635 staff to handle the Court's caseload. Most of the cases involving the elderly are currently categorized as Probate case type, and are filed and heard in the Probate Division. Criminal elder abuse matters, covered under the provisions of California Penal Code sections 368-368.5, (see Appendix A) are filed and adjudicated in the Criminal Division. Requests for Elder or Dependent Adult Protective or Restraining orders are filed and heard in the Family Law Division.

The purpose of this research paper is to address the following questions and issues:

- 1) What is the projected increase in caseload relative to the current elderly population in Orange County?
- 2) What court programs are we providing now specific to the elderly?
- 3) What best practices, techniques, and programs have been implemented by courts in other counties to meet court-related needs of the elderly?
- 4) What court programs can Orange County Superior Court implement to meet the court-related needs of the elderly?

Case filing trends in Orange County show a steady increase in the last decade in new case filings for Conservatorship and Elder Abuse cases, although, filings for General Probate cases showed a decline for the same period. Besides the case types mentioned that are specific to the elderly, it is difficult to ascertain how many more elders are parties to other case categories, such as small claims, landlord-tenant

disputes or foreclosure matters, or are defendants accused or convicted of other crimes in Orange County. Statistical research is hampered by the fact that Orange County Superior Court currently utilizes three different case management systems that do not interface and, in most cases, the age of a party or a victim is not captured in the case management systems.

The first part of this research paper reviews the relevant literature. As part of this report, a review of other available programs offered by courts nationally and in California was conducted to ascertain best practices that can be replicated or enhanced for Orange County Superior Court. A review of court websites in California shows that a number of courts have implemented programs that specifically address the needs of the elderly population.

Alameda County Superior Court established an Elder and Dependent Adult Access Program that provides information to the elderly, helps them to navigate the court system, assesses their needs, provides support for court hearings, and provides contact information for the various services offered by community partners.

Contra Costa County Superior Court's Elder Court Program was the recipient of the prestigious 2010-2011 Ralph N. Kleps Award for Improvement in Administration of the Courts. The Elder Court program is a unique partnership of the court and community pooling resources together to ensure justice for elders.

Ventura County Superior Court, after extensive research and partnering with community stakeholders implemented the Elder Law Project which included a dedicated Elder Abuse Court Calendar and a number of other measures to address the needs of the elderly population in that county.

The second part details the methodology and data collection steps that were undertaken. This includes the collection of data from three case management systems and distribution of three surveys. The research study analyzes case filing trends and identifies services our court currently provides to its elderly. This is necessary to determine if new and innovative approaches are necessary to meet the anticipated changing needs of this segment of the population. It is evident that the need for a comprehensive judicial response is needed now, and will even be more pressing in the coming years.

The third and fourth sections of this report present the results and findings of the data collection. Finally, the last section summarizes the conclusions and recommendations to establish concrete steps to ensure the Court is prepared to meet the challenges ahead.

Truly, there are innovative ideas that have been implemented by a number of courts by employing creative strategies, particularly those that include working collaboratively with community partners. The programs have been implemented in spite of the historical budget shortfalls that have presented unprecedented challenges to

the judicial system. Given the continued growth in the elderly population of Orange County, and recognizing that increased demands and expectations will be placed on the Court, we need to take a closer look now before we reach a crisis point. Orange County Superior Court provides some services now for its elderly constituents but what else can be done and what needs to be done? This study will attempt to answer these questions.

REVIEW OF RELEVANT LITERATURE

A. Projected Increase in Elderly Population

Nationally, the number of Americans 65 and older is projected to double to nearly 70 million by 2030. The latest report from the U.S. Census shows that the 85 and older population is the fastest growing cohort – projected to grow from 4 million in 2000 to 19 million in 2050. This is primarily due to increasing longevity and declining birth rates. Americans who are now turning 65 will live an additional 18 years, on average. This is significant since research shows that this “oldest old” age group has the highest levels of physical and cognitive disabilities. (Administration on Aging, 2010, p. 2)

In California, the population 65 and older is expected to double in size by 2020. (California Department of Aging, 2011) More than half the counties in California, including Orange County, are projected to have an increase of over 100% in this age group. (See Appendix B)

In 2009, approximately 6.9% of older adults in Orange County were living below the poverty level and the numbers are rising faster than that of the State and the nation. (Community Health and Prosperity, 2011) The 2011 Orange County Indicator noted that the demand among older adults for the County's In-Home Supportive Services program had increased 171% over the past 10 years and the number of seniors receiving Medi-Cal had grown an average of 5% per year. (Orange County Community Services, 2011)

B. Impact on Court Services

Orange County is a racially and ethnically diverse region. The projected change in older adult population compared to all ages shows a 260% increase for Hispanics and 152% for the Asian population between 2010 and 2030.

In 2009, more than a third of the people living in Orange County were foreign born and 45% spoke a language other than English at home, and of these, 60% spoke Spanish and 28% spoke Asian languages. (Orange County Community Indicators, 2011, p.6) In Orange County, where 22% of the total population report that they do not speak English "very well", the language barrier is a challenge the Court will increasingly face. The problem for any person with limited English proficiency is exacerbated for older adults who may also be experiencing declining physical and mental capacity. It is anticipated that there will be an increase in the need for language services, including court interpreters, document translation, and materials in languages other than English.

According to the 2009 California Health Interview Survey, 33% of older adults have a disability, compared to 5% of the non-senior adult population. (California Health Interview Survey, 2009) It is important to take this into consideration and examine barriers to full access. It is essential to “equal access to justice” to have courts that are accessible. It is often said that “inaccessible justice is justice denied” and this fact is particularly pressing for the elderly who might have problems getting to the court to fully participate in the judicial process. It is prudent to establish workable solutions now to overcome any possible barriers.

The Adult Protective Services in Orange County received a total of 7,422 unduplicated reports in 2010, a 65% increase from the year 2000. (see Appendix C) For FY 2009/2010, 463 reports of financial abuse of elder and/or dependent adults were received from financial institutions, reflecting an 18% increase from the previous fiscal year. (Orange County Social Services Agency, 2011) This will likely translate to an increase in the Court’s elder abuse cases.

C. Case Volume Projection

In a 2008 article entitled “The Implications of an Aging Population for State Courts”, Richard Van Duizend, a Principal Court Management Consultant for the National Center for State Courts, noted that:

The substantial increase in both the number and proportion of older Americans will propel the courts handling probate matters into the limelight. The caseload will increase greatly in most

areas of traditional probate-court jurisdiction, including wills and estates, mental-health matters, guardianships, and disputes over eligibility for and the scope of government services for ill, disabled, or elderly persons.

A review of the Court Statistics Report published annually by the Judicial Council of California and the Administrative Office of the Courts shows that more than 10 million new cases were filed in the State of California during fiscal year 2009-2010 (Table 1).

Fewer than 1% of the cases filed were categorized as Probate cases. Although California is home to one of the largest elderly populations, Probate case filings showed a decreasing trend (Table 2). In a report from the Center for Court Research, Innovation and Planning, (Aikman, A. & Viscia, K., 2003) it was noted that the trend in Probate case filings in California is not consistent with the national filing trends. The report added that the statewide filings between 1991 and 2000 in a 26 state national sample excluding California showed an increase by 14% and California's filings for the same period dropped by 19%. The statewide data does not account for separate filing numbers for conservatorship cases. The report further noted that it is likely that the decline can be attributed to proliferation of living trusts in California in the last decade. (Trial Court Workload, 2011) However, many of the living trusts are drawn up by non-lawyers and the potential for these matters to come back to court for interpretation and litigation is likely.

Table 1: Total Case Filings - California (FY 1998 - 2010)

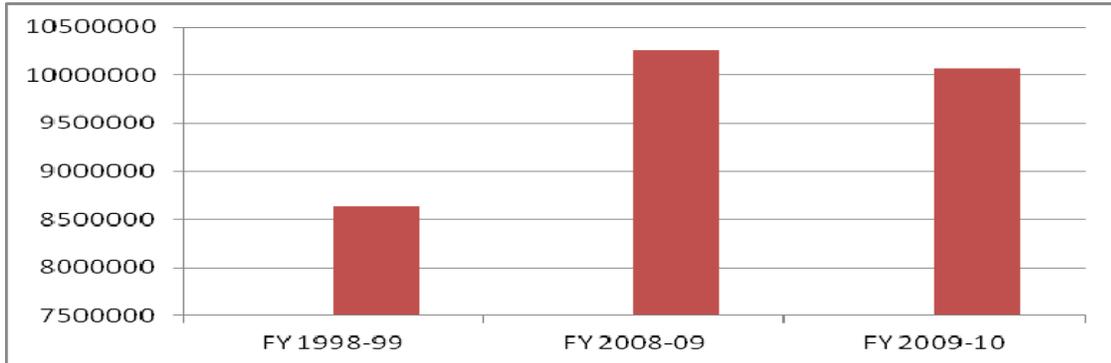
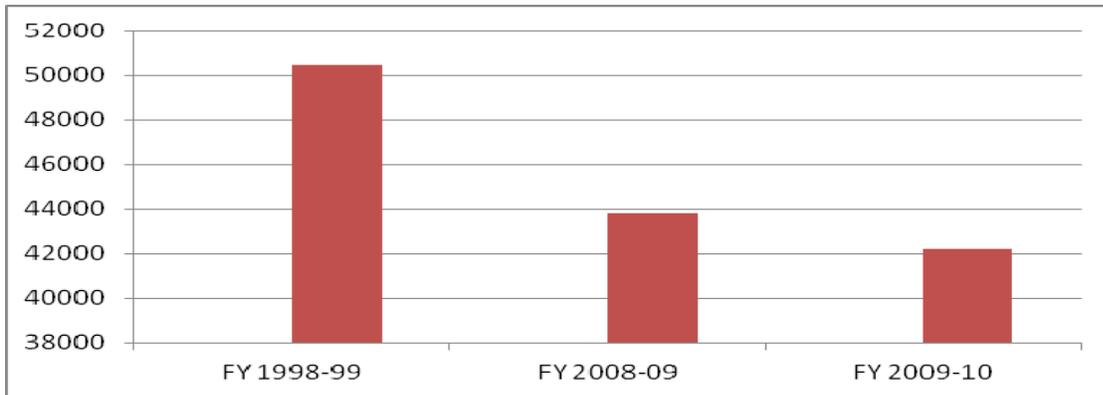


Table 2: Total Probate Filings – California (FY 1998 – 2010)



Even though General Probate and Conservatorships cases are two of the major case types affecting the elderly, there is a great likelihood that the rising elderly population will affect other case types, including criminal, civil, and family law - particularly cases involving Elder Abuse. According to the Administration on Aging, nearly 2 million older Americans are abused each year. The State of California Attorney General's office estimates nearly 200,000 Californians are victims of Elder Abuse each year. (California Office of the Attorney General, 2011) Orange County agencies receive

more than 8,000 reports annually. (UCI Today News, 2011) The substantial increase in number of elder abuse reports will have a major impact in the court's workload. Cases will not only increase in the criminal case filings but will like be manifested in other case types, such as small claims, unlawful detainer or landlord-tenant disputes, civil fraud, personal injury, and various other areas of the law.

D. Review of Programs or Initiatives Other Courts Have Implemented

A literature review was conducted from various on-line resources to gather information on programs, initiatives, technology and practices that have been implemented to address elder issues. The following section describes key elements of some of the programs.

Elder Justice Center (EJC) - Tampa and Hillsborough Counties in Florida.

The EJC provides five primary functions:

- 1) a designated facility to respond to the needs of the seniors in the community, including information and referrals. The facility includes assistance with communication devices, brochures on services available in the community, and wheelchairs for use at the courthouse;
- 2) public education with topics such as telemarketing and consumer fraud, elder abuse, identity theft, and guardianship;
- 3) coordination with existing agencies, such as legal services, law enforcement, and long-term care facilities;

4) case management services for victims of abuse, neglect, and exploitation, including advocacy in criminal cases and case coordination when an elder is involved in multiple cases; and

5) case management and monitoring services, including review of all initial guardianship reports, review of guardian fee petitions, and court monitoring services.

Elder Protection Court – Alameda Superior Court, California

Alameda Superior Court created the Elder Abuse Protection Court Project in 2002. It has combined civil and criminal calendars dedicated to elder abuse cases. The special calendars offer elders a shorter wait-time in the courtrooms, and provide greater privacy for public hearings dealing with confidential matters. The calendars are heard weekly at each of the courthouses, and they are scheduled late in the morning to give seniors more time to travel to the courthouse. One judge handles the calendars with the help of two court domestic violence case managers who provide limited services. The calendars do not include Probate and guardianship/conservatorship cases. Similar to a Family Violence Council where the courts provide leadership, the EPC has put together an Elder Access Committee that meets quarterly at the courthouse.

Elder Court – Contra Costa Superior Court, California

The court's website provided a wealth of information for this review. Contra Costa's Elder Court Program was launched in November 2008 with the Hon. Joyce Cram presiding, coordinating and adjudicating the Elder Abuse cases. The calendar includes felony, civil harassment, probate conservatorship applications for temporary restraining orders and permanent protection orders, and referrals of certain family law and small claims cases involving elder abuse. A senior peer counselor gives emotional support to each senior before their hearing, and experienced attorneys offer free legal advice to indigent seniors. The courtroom is equipped with a wheelchair, assisted listening devices, eyeglasses, and a document magnifier. This program was the recipient of the 2010-2011 Ralph N. Kleps Award for Improvement in the Administration of the Courts, the highest award given to the State's courts each year by the Judicial Council of California, the policy making body of state courts. Because of its success, other courts have replicated the program. The Superior Court of Ventura County's Elder Court is based on the Contra Costa court's model.

In June 2010, a research study completed for the National Institute of Justice entitled *A Multi-Site Assessment of Five Court-Focused Elder Abuse Initiatives* (Stiegel, L. & Teaster, P., 2010, p. 3-5) was reviewed for additional information. Two of the courts that took part in this study, Hillsborough and Alameda are described above. The other three programs described in the report were the "Elder Abuse Temporary Order of Protection Project" of Kings County, New York, the "In-Home Emergency Protection

Order Initiative” of Jefferson County, Kentucky, and the Elder Justice Center of Palm Beach County, Florida. The study described the programs for these three courts as follows:

“Elder Temporary Order of Protection” Initiative (ETOP) – Kings County, New York

The initiative assists eligible victims of domestic violence who are 60 or older and unable to travel and appear in court personally. Social workers and lawyers are available to assist any client age 60 years and older who is a victim of abuse. They provide emergency counseling, direct services, and information regarding services available. They also act as liaisons to the assistant district attorney.

“In-Home Emergency Protective Order Initiative” (IEPOI), Jefferson, Kentucky

The program helps medically fragile/homebound victims of abuse aged 60 and older to obtain emergency protective orders and longer-term domestic violence orders by telephone without having to leave their homes. The program is a partnership of a number of agencies, including ElderServe, Inc., a non-profit provider of aging services office, and the Jefferson County Sheriff’s office.

“Elder Justice Center” (EJC) in Palm Beach County, Florida

The EJC is a court program funded by the Board of County Commissioners. It is

available to persons over the age of 60 who have age-related issues and need assistance. The staff of the Elder Justice Center does not give legal advice. Some of the services provided include:

1. ensure persons over 60 have full access to the courts and various programs;
2. participate in the community's service providers' network;
3. provide information and make recommendations to the Court regarding special needs of persons over 60 who are involved in court; and
4. provide guidance and referrals to the elderly who have matters pending before the court.

The study found that the initiatives improved the handling of elder abuse cases and enhanced the criminal justice response in several ways, and that each initiative does a better job of handling elder abuse cases than do courts and communities without such initiatives. (Stiegel, L. and Teaster, P., 2010, p. 23)

E. National Center for State Courts Resource Website

The National Center for State Courts launched the Center for Elders and the Courts (CEC) in 2008. The cornerstone of the CEC is a court-focused website. The website provides a number of resources primarily geared towards the judiciary and court management on issues related to aging, probate and elder abuse. The user-friendly website offers a variety of resources that include a Problem-Solving Toolkit

which outlines problem-solving approaches and steps necessary to successfully develop court programs for the elderly. (Centers for Elders and the Courts, 2011)

METHODOLOGY

Information to help provide answers to the research questions was gathered from a number of sources using two basic methods:

1) compilation and analysis of statistical data from the Court's Monthly Filing Reports and three Case Management systems;

2) compilation and analysis of three surveys in the form of questionnaires. The following sections describe in particular the methodologies for each area of research.

Data compilation from Monthly Filing Reports for Probate Cases

The Planning and Research Division of the Orange County Superior Court distributes a Monthly Case Filings Report to all managers, executives and supervising judges. A summary report includes new case filing statistics for each case category. The Probate report breaks down by category cases heard and adjudicated in the Probate Division. The statistical breakdowns are as follows: General Probate, Guardianship, Conservatorship, Adoptions and Terminations, Mental Health, Civil Petitions and SafeKeeping Will. For this study, only statistical data for General Probate and Conservatorship cases were analyzed. The other categories do not have a

direct impact on elder issues and were not included in this report. The data from the reports was reviewed to determine filing trends from 2000 to 2010.

Compilation and Analysis of Case Filing Data from Case Management Systems

In addition to the monthly filing reports prepared by the OCSC Planning and Research Department, case filing data to project trends on case volume were pulled from the Court's two case management systems, Vision and Banner. Three separate case filing reports on PC 368 (criminal elder abuse) for FY 2000/01, FY2005/06 & FY2010/2011 were generated from the Vision Management Reports on November 21, 2011. Three separate case filing reports on family law elder abuse new case filings were generated on December 15, 2011 from the Banner Case Management system for FY 2000/01, FY2005/06 & FY 2010/11. The data from these reports have been analyzed to determine filing trends for Elder Abuse cases.

Survey Instruments

Three separate surveys were distributed to targeted groups. The first survey was distributed on November 6, 2011 as an attachment through the Court's e-mail system to key personnel comprised of the following: Victim Witness Advocate, Supervising Court Investigator, Traffic Referee/Mediator, Courtroom Clerk, Prosecutor that specializes in Elder Abuse cases, Operations Managers for Civil and Family Law Units, Courtroom Supervisor, Self-Help Attorney & Manager, SSA deputy administrator,

Public Law Center representative, Legal Aid Society Elder Cases specialist, judicial officers handling Probate & Elder Abuse matters, Elder Abuse Coordinator at the Center of Excellence on Elder Abuse and Neglect Program in Geriatrics from the University of California, Irvine; and the Orange County Senior Center administrator. Responses to the survey questions were received from 12 of the 15 questionnaires sent out. A follow-up reminder was sent out, but as of the drafting of this report, responses had not been received from three of the Court's justice partners.

The survey questionnaire asked the following questions:

- 1) The elderly population in Orange County is growing; do we need a special court to handle these cases?
- 2) Does the court need to change existing processes to handle the increase in the elderly population entering the judicial system? How?
- 3) What increased services, if any, will the elderly population need from the Court?
- 4) What cooperative efforts from the court and our stakeholders are needed to serve the anticipated growth of the elderly population in our county?
- 5) What do you envision the optimal response to look like, e.g., one judge to hear all cases involving seniors over a certain age?
- 6) What problems do you foresee the court will face if we maintain the status quo?
- 7) What other community resources should be incorporated in the Court's response?
- 8) What other considerations – such as facilities or hearing times should we keep in mind?

- 9) Do you feel that, no matter how the elder enters the system, there is a need for the Court to ascertain the elder's situation in its totality?

In collaboration with the Court Executive Officer, a second survey was distributed to Orange County Superior Court managers who are overseeing departments that provide services to the elderly. The objective of the survey was to ascertain what Orange County Superior Court is doing now and what services are currently offered. The request for information was sent out after a meeting convened by the CEO on November 17, 2011. A total of eight unit managers and court officers responded to the request for information.

The third survey was distributed on December 5, 2011 to all court personnel in other counties who are affiliated with the California "*PiNetwork Listserv*" electronic distribution list. This survey asked respondents to reply if their court has implemented a program or initiative geared towards the elderly. The survey was conducted to determine if other courts in California have recently developed and implemented programs or initiatives. Responses were received from the courts of Tulare, Sonoma, Alameda, Contra Costa and Nevada Counties. The survey questionnaire consisted of twelve questions, as follows:

- 1) Can you briefly describe the program or initiative your court implemented to meet the needs of the elder population?
- 2) What was the reason behind the creation of the program?
- 3) How are cases identified or tagged and managed?

- 4) How is the program staffed?
- 5) How did you get involved in the program?
- 6) Was there training needed for staff involved in this program?
- 7) How are bench officers assigned?
- 8) Do you use judges or commissioners?
- 9) Since you started the program, have other courts replicated the same?
- 10) What is the cost of running the program?
- 11) How do you measure program performance?
- 12) What are the challenges you faced in the implementation of the program?

RESEARCH FINDINGS

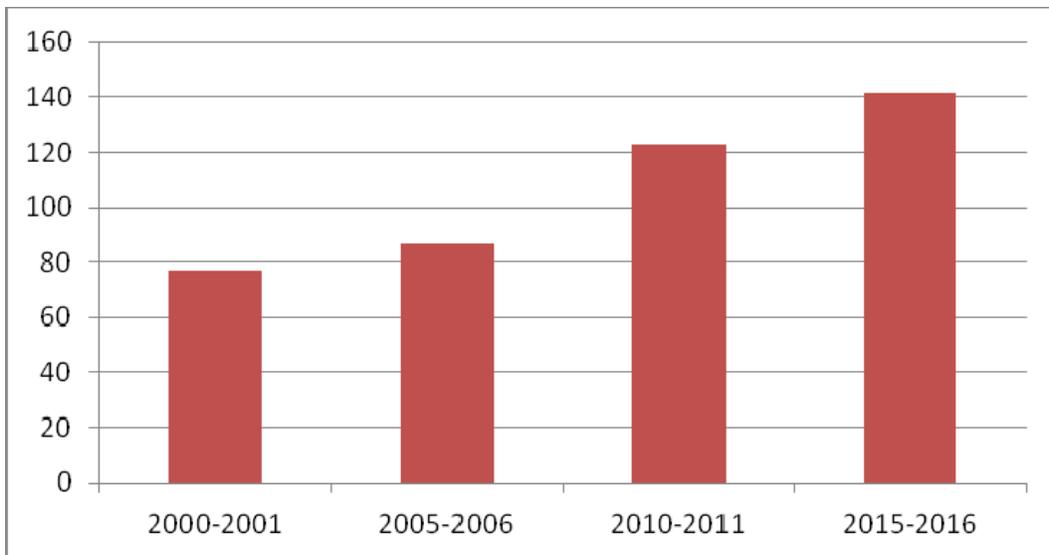
Results of the research conducted are provided for each area of study as described in the methodology section. The summary of the findings is divided into two sections. The first section consists of findings from data pulled from the Court's three case management systems, the objective of which is to analyze case filing trends and the anticipated impact on the Court's workload. The second section discusses the results of the three surveys. The first survey was sent out to court unit managers in charge of units or divisions that offer services to the elderly in order to ascertain services offered now and determine if what additional services are needed in the future. The second survey was distributed to key personnel including the Court's justice partners in order to explore opportunities for collaboration and information sharing and determine what court programs OCSC can implement to meet the court-related needs

of the elderly. The third survey sought to ascertain information from California courts that have implemented programs and initiatives to serve their elderly constituents.

Finding 1-1: There is a projected increase in Criminal Elder Abuse cases

As mentioned in the Introduction, criminal elder abuse cases (PC 368) are heard and adjudicated in the Criminal Division. Table 3 reflects the case filing trends based on data extracted from the Vision case management system for the FY 00/01, FY05/06 & FY10/11. New case filings reflect a 37% increase in the last ten years and are anticipated to double by 2015.

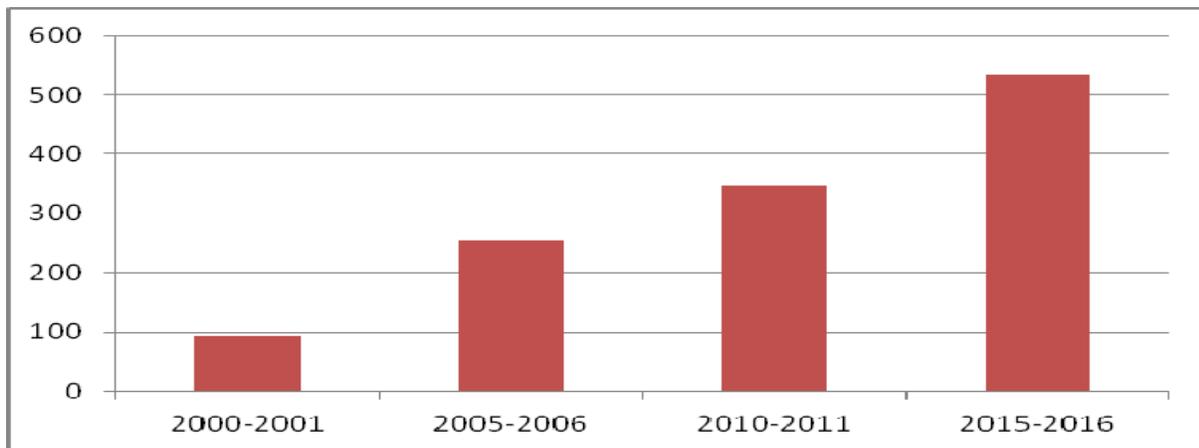
Table 3 - Past and Projected New Case Filings of Criminal Elder Abuse Cases: Orange County Superior Court



Finding 1-2: There is a projected increase in Family Law Elder Abuse Requests for Protective Order.

Data pulled from the Banner case management system for Family Law Elder Abuse cases reflects an increase in filings of more than 300% compared to 10 years ago. Case filings are anticipated to increase further in 2015 as the number of elders increase.

Table 4 - Past and Projected New Filings of Family Law Elder Abuse Cases: Orange County Superior Court



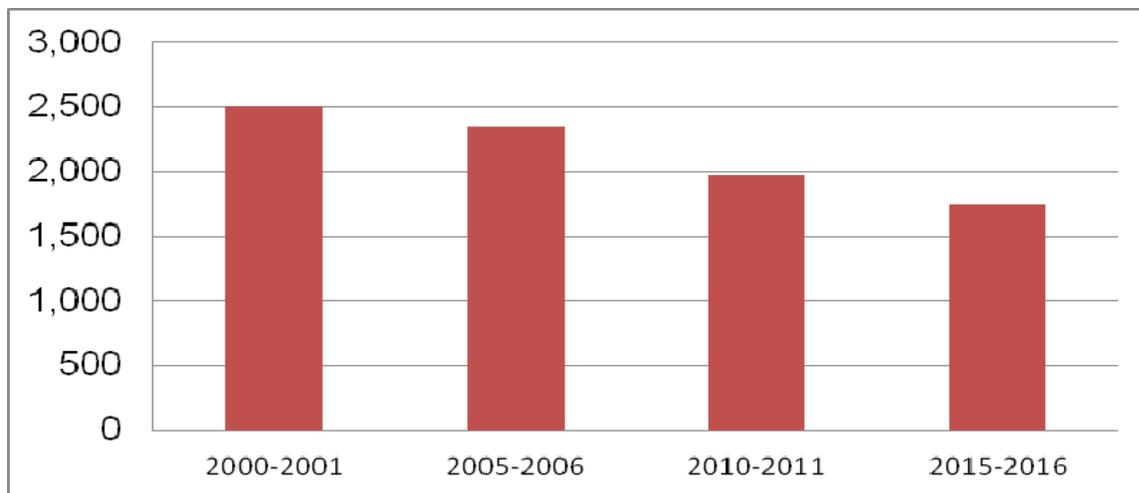
Finding 1-3: There is a projected decrease in General Probate case filings

General Probate case filings decreased by 21% from FY00/01 with total filings of

2,506 compared to 1,977 in FY10/11. As shown in Table 5, the number is projected to decrease slightly in 2015. As stated previously in the Introduction, the decline in filings may be attributed to the popular use of living trusts and other estate planning processes in California. Additional research is needed to validate this assumption.

Table 5 - Past and Projected New Case Filings of General Probate Cases:

Orange County Superior Court

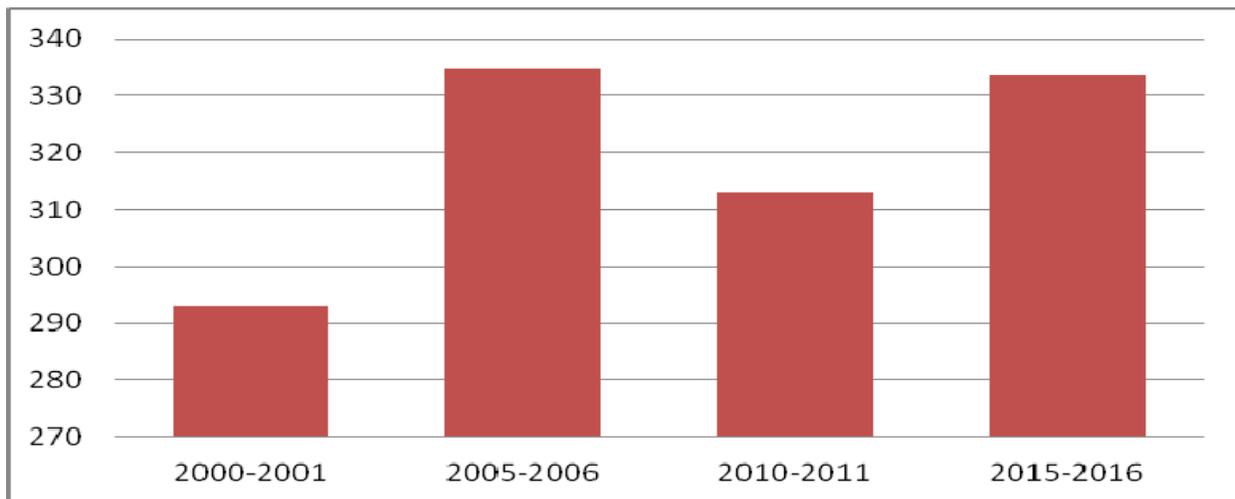


Finding 1- 4: There has been a steady increase in Conservatorship case filings and this is expected to continue.

Statistical data gathered by the OCSC Planning and Research unit from the Court Case Management System (CCMS) showed a 6% increase in filings, compared to filings 10 years ago. However, the filings declined by roughly the same amount compared to FY05/06. It is estimated that case filings will continue to increase in the next decade. This is illustrated in the following Table 6.

Table 6 – Past and Projected New Filings of Conservatorship Cases:

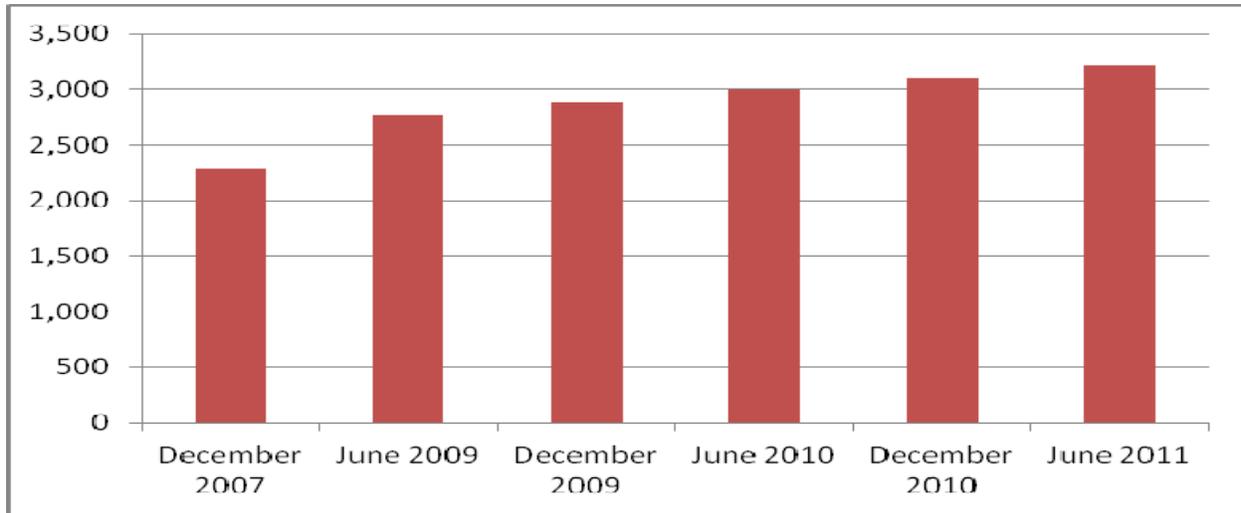
Orange County Superior Court



Although new case filings in conservatorship cases showed a slight decrease compared to five years ago, data pulled by OCSC Planning and Research Unit as to the total number of general conservatorships under supervision has steadily increased since 2007. As illustrated in Table 7, at the end of fiscal year in 2011, there were a total of 3,215 cases, compared to 2,286 in December 2007. This reflects a continued increase in the Court’s workload as illustrated in Table 7.

Table 7 - Number of General Conservatorships Under Court

Supervision: Orange County Superior Court



Survey Instruments

The first survey results reviewed were responses received from an electronic mail communication distributed to eight court managers in OCSC who are in charge of a unit or department that oversees cases affecting the elderly. The request for information posed the question, “What services do we offer now?”

Finding 2-1: OCSC is currently providing services to elders.

OCSC currently provides physical accommodations to all persons with disabilities, not just the elderly. Some examples of these are assisted listening devices, wheel chair accommodations such as low filing counters, and accessible restrooms. The request for information sought from the managers information about additional services currently offered besides the physical accommodations mentioned above.

The eight responses received from the court managers were compiled and detailed on the following table.

Table 8 - Services Currently Offered by OCSC Geared Towards Cases Involving Elderly

Department	Services Offered
Probate	<ul style="list-style-type: none"> • Orientation class each Tuesday afternoon for potential conservators • Prior to the conservatorship hearings, the proposed conservatee is interviewed by a probate court investigator. If conservator is appointed, the conservatee is visited a year later then every two years to determine if the conservatee’s needs are being met by the conservator. Referrals to community resources are also made available. • As need is identified, the probate investigator or examiner may request the court to consider appointment of an attorney and/or guardian ad litem for the proposed conservatee. • Probate investigators conduct unannounced home visits any time the department receives a community complaint. • “Red Inbox Strategy” – if the investigator finds the care of a conservatee substandard, the annual/biennial report is routed directly to supervising judge for immediate review.
Family Law	<ul style="list-style-type: none"> • Resources for elder/dependent adults are available in the clerk’s office • Referrals are made to the Lamoreaux Justice Center (LJC) Domestic Violence Assistance Office (DVAP) for assistance in obtaining a restraining order. • Hearings are heard in late morning to better accommodate the needs of elder or dependent adults. • Ex parte and noticed hearings are scheduled before judicial officers specially trained in elder/dependent adult abuse. • Judicial officer may make referrals to Adult Protective Services and may appoint a W&I Code 730 expert to

	perform an evaluation of an elder.
Family Court Services	<ul style="list-style-type: none"> • Mediation is available after referral from either Probate or Family Law departments
Self-Help Center	<ul style="list-style-type: none"> • Community resource lists in English and Spanish language, as well as the “Seniors and the Law” publication from the California State Bar, are available in all court Self Help Centers. • Clinics for limited conservatorships for developmentally disabled adults are held on the first Monday of each month, except for holidays. Legal Aid has applied for a partnership grant to expand the clinics from monthly to weekly. • Guardianship clinics • Triage for all restraining order types
Collaborative Courts	<ul style="list-style-type: none"> • All clients of the Community Court, including elder and dependent adults, are assessed for their needs and referred to appropriate providers and resources -from health services and legal aid, to physical assistance and government benefits. • Homeless clients, including elder and dependent adults, are able to resolve their infractions and low-level misdemeanors while being connected to a variety of supportive services through Homeless Outreach Court.
Criminal and Civil	<ul style="list-style-type: none"> • Physical accommodation such as assisted listening devices, ADA filing counter and wheel chairs are provided by both divisions to the elderly.
Domestic Violence Assistance Program (DVAP) at Lamoreaux Justice Center	<ul style="list-style-type: none"> • Victim Advocate trained in elder and dependent adult issues is available all day on Thursdays and Fridays each week to work with domestic violence restraining order clients. The rest of the week, the regular DVAP staff is available to assist with restraining order issues. • Provides the resource guide “A Citizen’s Guide to Preventing and Reporting Elder Abuse”, available in English, Spanish and Chinese (created by the California Office of the Attorney General) • Provides referrals to local resources

The second survey instrument was distributed to fifteen key personnel and justice partners previously described in the Methodology section of this report. The survey questions were designed to elicit information from the respondents to determine the anticipated impact to the Court of the projected increase in the elderly, and to identify the range of potential responses the Court should undertake to meet the needs of this segment of the population. The results of the survey provided valuable insights and a summary of the significant findings relevant to this survey instrument is discussed in detail below:

Finding 2-2: There is a need for an Elder Court or Specialized Court.

Overwhelmingly, 11 out of 12 respondents agreed that with the growing elderly population in Orange County, creating a special court is the optimal response. The vision is to have an elder community court where one judge hears all cases and all resources at one site for easy referral. Elder Court would be advantageous from both a physical accommodation viewpoint and as the most efficient use of court resources. However, a number of respondents stated that it might not be as important to designate a special court, as it would be to make special accommodations in the court system. Respondents surmised that courts with 3 to 4 judges sensitive to issues concerning the elderly would be more beneficial. It is important that judges and court personnel fully understand the difficulties that the elderly face and be flexible enough to allow for special consideration based upon the needs of the elderly when they appear in court.

Finding 2-3: There is a need for cooperative efforts from the Court and its justice partners.

Responses to Question No. 4 of this survey revealed that there is a consensus among respondents that a great opportunity exists for the Court to work collaboratively with its justice partners. There are obvious areas that will lend themselves to collaboration, such as working with community services to determine what services are available for the elderly population, what help is available to the elderly in navigating the legal process, and what information is available about clinics and workshops, low-cost legal representation, mediation and shelters. The Court may need to increase referrals to available assistance providers and networks for aging and disability. Joining on projects that are both beneficial to the Court and its justice partners could open up additional funding sources and allowing the Court and the stakeholders to pursue their core objectives. Respondents added that the Court's participation at stakeholder meetings, conferences and in-service trainings is important for open information sharing.

Finding 2- 4: There is a need for Judicial and Court staff training on Elder Abuse and other aging issues.

All respondents agree that educating the Judicial Officers and the Court staff about the special needs of elderly is paramount. A more comprehensive training program is needed, particularly on elder abuse cases, dementia-related criminal and

civil cases, conservatorships and the special needs of elderly witnesses and victims. Issues of capacity will arise in a number of situations such as landlord-tenant disputes, real estate cases, and jury service. It is necessary that court staff are sensitive to these issues and recognize cognitive biases - dispelling the myth that all the elderly are alike. A number of the respondents stated that too often older adults are “lumped” into one category – senior citizen – and at times stereotyped and subjected to judgments about the way they think, or that someone with physical disability is impaired cognitively or vice versa.

Finding 2-5: There is a need for accommodations to best enhance court access for the elderly.

The court currently provides physical accommodations such as assisted listening devices, automatic doors in some areas, and filing counters and restrooms that are wheelchair accessible. Analysis of the responses to the relevant question of the survey revealed that respondents feel increased services will be needed from the court. A number of accommodations include proper sound and amplification systems so court proceedings can be heard; materials in large print; document magnifiers and eyeglasses; additional ADA parking spaces; and easy access to courtrooms and the witness stand. In addition to physical accommodations, several respondents added that scheduling calendars later in the morning might be more convenient for an elderly person. Assistance from trained staff or peer volunteers or representatives from on-site

agencies to explain court process has been suggested by a number of the research participants.

Finding 2-6: Programs or initiatives have been implemented in some courts to accommodate the elderly.

A third survey was carried out informally through the California Court PiNetwork group. The questionnaire requested information for innovative programs or initiatives that have been implemented to address elder issues. While the review of literature identified a number of innovative programs that have been implemented nationally, this survey, focused on programs and initiatives that have been implemented in California and Nevada. Five program managers responded from five courts: Alameda, Contra Costa, Tulare, Sonoma and Nevada. Responses to the survey are presented in the following section.

Tulare County Superior Court

The Court Administrative Manager described the program as a partnership between the Tulare Superior Court and the Central California Legal Services (CCLS), a non-profit group. Assistance is provided to income-eligible seniors who need assistance with paperwork. The project is funded by the Equal Access Fund Partnership Grant. An advocate from CCLS is present in the courthouse five days a week to assist the elderly with obtaining protective orders, responding to

Conservatorship petitions. With the aging baby boomer population, the need for assistance is greater. Cases are managed by referring parties to the service provided by the court, primarily by word of mouth. Flyers about the program area made available in the clerks' offices and in the courtrooms. Parties appearing in court who may need assistance in preparing orders or completing paperwork are approached and offered assistance. The program was started after CCLS sought grant funding and contacted the court to develop a partnership. There is no additional cost to the court with the exception of the space provided for CCLS staff and the cost of flyers. The biggest challenge the program faces is making elders aware of the assistance that is available to them. Since the program is new, the court has not completed program performance measurement at this time.

Ninth Judicial District Court – Nevada

The Ninth Judicial District Court for the State of Nevada established the Douglas County SAFE (Special Advocates for Elders) program in 2010. The program was based on a combination of similar programs in Reno, NV and the Court Appointed Special Advocate (CASA) program. The program differs from the Reno SAFE program in that it operates under the jurisdiction of the judges instead of a non-profit corporation. The advocates are considered investigators and therefore, carry judicial immunity.

The coordinator of the program is a retired attorney, whose responsibility is to recruit and train and supervise volunteer advocates as cases are assigned to them. The program has approximately 25 trained advocates with the goal of training an additional 15 within the next six months. SAFE is involved in about 50 Conservatorship cases. In Nevada these are referred to as “adult guardianship” cases.

The program was created after the District Court judges became concerned about the large number of Guardianship cases in which there were no close family members involved as the wards had relocated to Nevada for retirement. The SAFE advocates have uncovered abuses by the Public Guardian as well as by family guardians.

Cases are identified by the SAFE coordinator who reviews cases for issues such as untimely filings, lack of inventories, accountings, and Guardian compensation. All new cases are reviewed by the coordinator to determine if the case needs to be referred to SAFE. Judges review the SAFE report to determine if guardianship is needed, who should be the guardian, and whether the guardianship should be a full or limited. The program is funded from grants, funds from filing fees, and from the general fund. The cost of running the program is about \$60,000 per year.

Sonoma County Superior Court

The Probate Court Services manager for Sonoma County Superior Court

responded to the survey advising the author that their court has been working over the last year and a half planning and developing an elder court program. These efforts were suspended last spring because of the fiscal challenges that a majority of the courts in California are facing.

A planning committee consisting of various justice partners who have an investment in this program has been established. Judge Julie Conger, a retired judge from Alameda Court who was instrumental in launching the elder court in Alameda, has been consulting with the committee to help identify the needs and priorities for the program. Members of the committee also visited Contra Costa Superior Court to look into their program, and met with the judicial officers and court staff involved. At the present time, the committee members are continuing with the planning process in the hopes that the California fiscal crisis improves in the near future.

Alameda County Superior Court

Alameda County Superior Court piloted an elder protection court several years ago. The objective of the program is to provide assistance and information to underserved seniors in the community and facilitate their navigation of the courts. Two case managers who are court employees staff the program. The case managers work on domestic violence and elder abuse cases. Dedicated phone lines were installed allowing parties to contact the program office directly to get information and referrals, particularly resources for elder abuse and assistance in navigating the courts. Two

bench officers are assigned at the north and south county locations to hear both criminal elder abuse and elder abuse protective order cases. Case managers provide on-the-spot information, including referrals to adult services to the parties that need them. In addition, case managers meet with the judicial officers regarding respondents' criminal histories and other relevant information. In addition, cases managers may also make appropriate APS reports.

Contra Costa County Superior Court

The Judicial Council of California awarded Contra Costa Superior Court's Elder Court Program the prestigious Ralph N. Kleps¹ award for 2010-2011 for Improvement in the Administration of the Courts.

The author interviewed Contra Costa Superior Court's Director of Court Program and Services who provided valuable information about the initiative, which was implemented in November 2008. A key element of the program is Elder Court, with one judicial officer presiding over a docket calendar heard weekly. The calendar includes every case type that involves elder abuse, including felony complaints, civil harassment, probate conservatorship applications for temporary restraining orders and permanent protective orders after hearings; referrals of certain family law and probate hearings involving elder abuse; and small claims and landlord tenant cases. Hearings are scheduled in the late morning or in the branch courts to accommodate elders'

physical needs and issues with transportation. The courtroom is equipped with assisted listening devices, eyeglasses, a document magnifier and a wheelchair.

The Contra Costa Elder Court collaborates with a number of community organizations that provide services to the elders; such as the Center for Human Development which offers mediation services to seniors who are in conflict with family members or care providers.

Volunteer Senior Peer Counselors, sponsored by the Contra Costa Health Services, are available at most elder court sessions. The program offers individual counseling and support groups. The Court obtained a partnership grant with the Contra Costa Senior Legal Services that supports the Senior Self-Help Center housed in the courthouse, close to the Elder Court. The Center is staffed by experienced attorneys and offers free legal assistance and referrals to indigent seniors. Services include assistance in completing restraining orders, small claims forms, and unlawful detainer and foreclosure actions. In addition, the Court has partnered with Spanish Global Solutions to provide volunteer interpreters every Tuesday morning. The services provided are free, there are plans to expand the program to include additional languages.

Another component of the Elder Court is the significant outreach efforts conducted by the judicial officer involved in the program and by representatives from the court's partner agencies. These efforts include printing and distribution of brochures

describing Elder Court and the promotion of the program by conducting presentations and actively speaking at service club meetings and various community events.

CONCLUSIONS AND RECOMMENDATIONS

Conclusion 1: There is a need for OCSC to actively collaborate with community groups and create alliances to address the needs of the elderly.

In order for our court to effectively provide the best service to the elderly population of Orange County, it is important for the court to know what services are available in the community, where services currently overlap, and what services are not available. There are a number of federal, states, local and private programs and services geared towards the elderly that currently exist in Orange County. Awareness of available community resources will aid the court in providing appropriate referrals and facilitate collaboration to ensure access to justice.

Recommendation 1: The Court should take a leadership role by convening a working group consisting of experts on older adult issues that include judges, court personnel, and representatives from area agencies on aging, advocacy agencies, and other justice partners. The group can identify needed services, and explore new possibilities for exchange of information and resources.

Conclusion 2: There is a need for a comprehensive judicial response to deal with the needs of the elder population in Orange County

Orange County Superior Court currently offers a number of services to accommodate the needs of its elderly population. The current response of the Court includes physical accommodations such as assisted listening devices, in addition to various other services provided by a number of different units or departments within the court. These efforts, however, do not include a coordinated response and there is limited information sharing among the various case types. Calendar coordination will continue to be a challenge since OCSC currently has three different case management systems.

Recommendation 2: The Court should conduct a comprehensive review of current structure and procedures in handling cases involving the elders to explore possibilities for the integration of court calendars and the coordination of courtroom proceedings.

It is important for the Court to ascertain the elder's situation in its totality. Having a complete understanding of the elders' family situation is critical in most cases. Information sharing among the various case types can result in the identification of related case-types involving identical parties. As an example, the Petitioner who is seeking to be named Conservator of an elder's estate can be a restrained party in a criminal case.

Conclusion 3: There is a need to develop training programs for judges and court staff on best practices in serving older adults in the court

Responses received from the second survey supports this conclusion. Judges and court personnel need training in meeting the needs of older people. It is important for the court to develop training programs and materials to recognize best practices, techniques, and a full understanding of the complex issues - particularly on the topics of elder abuse and neglect.

Recommendation 3: The Court should develop a training curriculum for judges and court staff on issues with aging and best practices in serving older adults in Orange County Superior Court.

Judicial officers and staff need education on elder abuse and the needs of the elderly. Training curriculum should include information about the aging process and its physical, psychological and financial aspects. The Bench and staff will need to understand the special needs of the elderly including witnesses and victims.

Conclusion 4: Elder Court initiatives have been successfully implemented in a number of courts

Elder Court programs in which one judge hears all cases involving elders, have been successfully implemented in a number of jurisdictions; the programs have ensured

comprehensive problem resolution and timely protections for elderly victims. However, most of the courts that have implemented these programs are small courts in comparison to Orange County Superior Court.

Recommendation 4: The Court should evaluate the potential benefits in establishing an Elder Community Court in Orange County. The Court can consider implementation of a pilot program with limited integration of calendars and courtroom proceedings for some case types. Having three different computer systems and separate courthouses can pose logistical challenges in integrating elder cases. We can, however, start with some “baby steps”.

APPENDICES

Appendix A: Penal Code 368 – 368.5

CALIFORNIA CODES
PENAL CODE
SECTION 368-368.5

368. (a) The Legislature finds and declares that crimes against elders and dependent adults are deserving of special consideration and protection, not unlike the special protections provided for minor children, because elders and dependent adults may be confused, on various medications, mentally or physically impaired, or incompetent, and therefore less able to protect themselves, to understand or report criminal conduct, or to testify in court proceedings on their own behalf.

(b) (1) Any person who knows or reasonably should know that a person is an elder or dependent adult and who, under circumstances or conditions likely to produce great bodily harm or death, willfully causes or permits any elder or dependent adult to suffer, or inflicts thereon unjustifiable physical pain or mental suffering, or having the care or custody of any elder or dependent adult, willfully causes or permits the person or health of the elder or dependent adult to be injured, or willfully causes or permits the elder or dependent adult to be placed in a situation in which his or her person or health is endangered, is punishable by imprisonment in a county jail not exceeding one year, or by a fine not to exceed six thousand dollars (\$6,000), or by both that fine and imprisonment, or by imprisonment in the state prison for two, three, or four years.

(2) If in the commission of an offense described in paragraph (1), the victim suffers great bodily injury, as defined in Section 12022.7, the defendant shall receive an additional term in the state prison as follows: (A) Three years if the victim is under 70 years of age. (B) Five years if the victim is 70 years of age or older. (3) If in the commission of an offense described in paragraph (1), the defendant proximately causes the death of the victim, the defendant shall receive an additional term in the state prison as follows: (A) Five years if the victim is under 70 years of age.

(B) Seven years if the victim is 70 years of age or older. (c) Any person who knows or reasonably should know that a person is an elder or dependent adult and who, under circumstances or conditions other than those likely to produce great bodily harm or death, willfully causes or permits any elder or dependent adult to suffer, or inflicts thereon unjustifiable physical pain or mental suffering, or having the care or custody of any elder or dependent adult, willfully causes or permits the person or health of the elder or dependent adult to be injured or willfully causes or permits the elder or dependent adult to be placed in a situation in which his or her person or health may be endangered, is guilty of a misdemeanor. A second or subsequent violation of this subdivision is punishable by a fine not to exceed two thousand dollars (\$2,000), or by imprisonment in a county jail not to exceed one year, or by both that fine and imprisonment.

(d) Any person who is not a caretaker who violates any provision of law proscribing theft, embezzlement, forgery, or fraud, or who violates Section 530.5 proscribing identity theft, with respect to the property or personal identifying information of an elder or a dependent adult, and who knows or reasonably should know that the victim is an elder or a dependent adult, is punishable as follows:

(1) By a fine not exceeding two thousand five hundred dollars (\$2,500), or by imprisonment in a county jail not exceeding one year, or by both that fine and imprisonment, or by a fine not exceeding ten thousand dollars (\$10,000), or by imprisonment pursuant to subdivision (h) of Section 1170 for two, three, or four years, or by both that fine and imprisonment, when the moneys, labor, goods, services, or real or personal property taken or obtained is of a value exceeding nine hundred fifty dollars (\$950).

(2) By a fine not exceeding one thousand dollars (\$1,000), by imprisonment in a county jail not exceeding one year, or by both that fine and imprisonment, when the moneys, labor, goods, services, or real or personal property taken or obtained is of a value not exceeding nine hundred fifty dollars (\$950).

(e) Any caretaker of an elder or a dependent adult who violates any provision of law proscribing theft, embezzlement, forgery, or fraud, or who violates Section 530.5 proscribing identity theft, with respect to the property or personal identifying information of that elder or dependent adult, is punishable as follows:

(1) By a fine not exceeding two thousand five hundred dollars (\$2,500), or by imprisonment in a county jail not exceeding one year, or by both that fine and imprisonment, or by a fine not exceeding

ten thousand dollars (\$10,000), or by imprisonment pursuant to subdivision (h) of Section 1170 for two, three, or four years, or by both that fine and imprisonment, when the moneys, labor, goods, services, or real or personal property taken or obtained is of a value exceeding nine hundred fifty dollars (\$950).

(2) By a fine not exceeding one thousand dollars (\$1,000), by imprisonment in a county jail not exceeding one year, or by both that fine and imprisonment, when the moneys, labor, goods, services, or real or personal property taken or obtained is of a value not exceeding nine hundred fifty dollars (\$950).

(f) Any person who commits the false imprisonment of an elder or a dependent adult by the use of violence, menace, fraud, or deceit is punishable by imprisonment pursuant to subdivision (h) of Section 1170 for two, three, or four years.

(g) As used in this section, "elder" means any person who is 65 years of age or older.

(h) As used in this section, "dependent adult" means any person who is between the ages of 18 and 64, who has physical or mental limitations which restrict his or her ability to carry out normal activities or to protect his or her rights, including, but not limited to, person who have physical or developmental disabilities or whose physical or mental abilities have diminished because of age. "Dependent adult" includes any person between the ages of 18 and 64 who is admitted as an inpatient to a 24-hour health facility, as defined in Sections 1250, 1250.2, and 1250.3 of the Health and Safety Code.

(i) As used in this section, "caretaker" means any person who has the care, custody, or control of, or who stands in a position of trust with, an elder or a dependent adult.

(j) Nothing in this section shall preclude prosecution under both this section and Section 187 or 12022.7 or any other provision of law. However, a person shall not receive an additional term of imprisonment under both paragraphs (2) and (3) of subdivision (b) for any single offense, nor shall a person receive an additional term of imprisonment under both Section 12022.7 and paragraph (2) or (3) of subdivision (b) for any single offense.

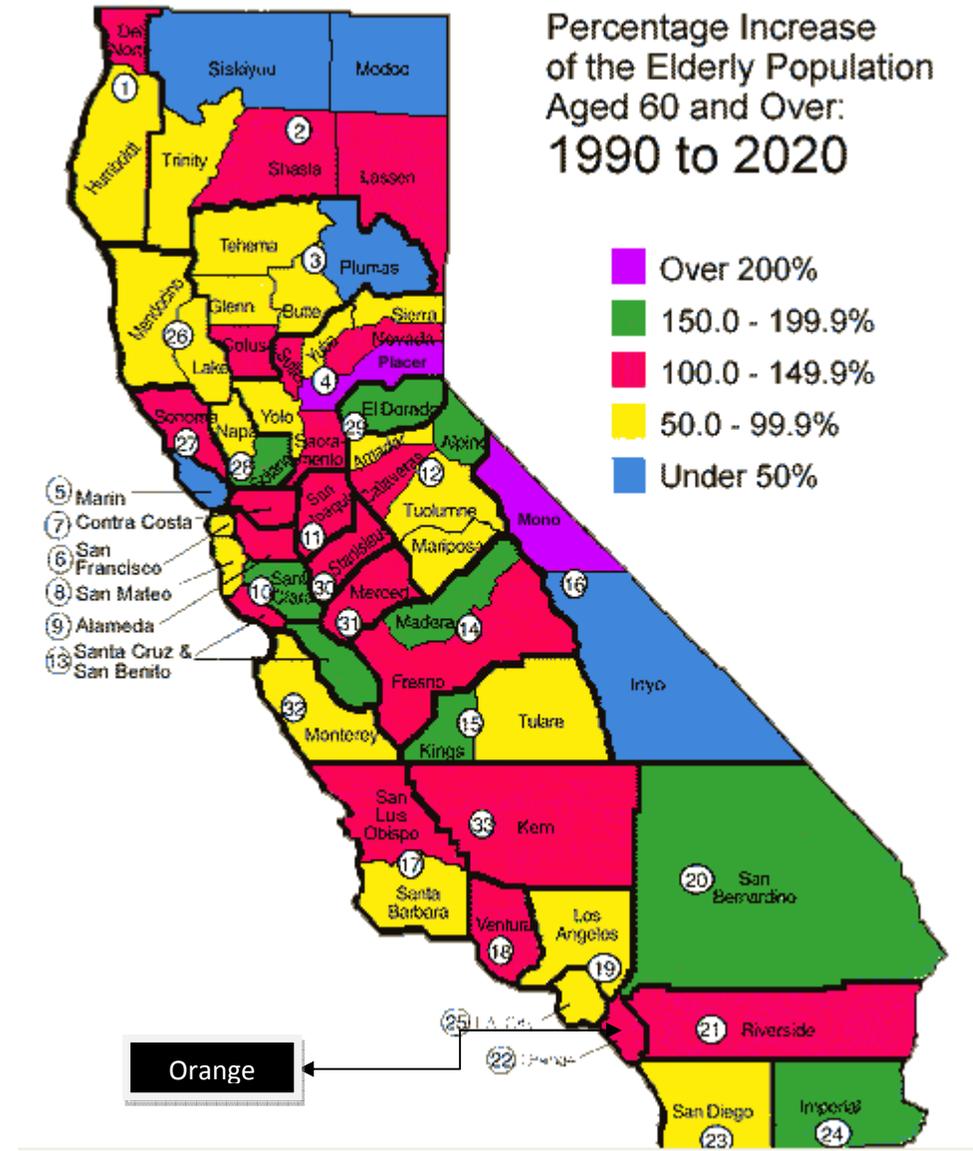
(k) In any case in which a person is convicted of violating these provisions, the court may require him or her to receive appropriate counseling as a condition of probation. Any defendant ordered to be placed in a counseling program shall be responsible for paying the expense of his or her participation in the counseling program as determined by the court. The court shall take into consideration the ability of the defendant to pay, and no defendant shall be denied probation because of his or her inability to pay.

368.5. (a) Local law enforcement agencies and state law enforcement agencies with jurisdiction shall have concurrent jurisdiction to investigate elder and dependent adult abuse and all other crimes against elder victims and victims with disabilities.

(b) Adult protective services agencies and local long-term care ombudsman programs also have jurisdiction within their statutory authority to investigate elder and dependent adult abuse and criminal neglect, and may assist local law enforcement agencies in criminal investigations at the law enforcement agencies' request, provided, however, that law enforcement agencies shall retain exclusive responsibility for criminal investigations, any provision of law to the contrary notwithstanding.

Appendix B: Percentage Increase of the Elderly in California

Source: http://www.aging.ca.gov/stats/map_narrative_2.asp (December 2011)

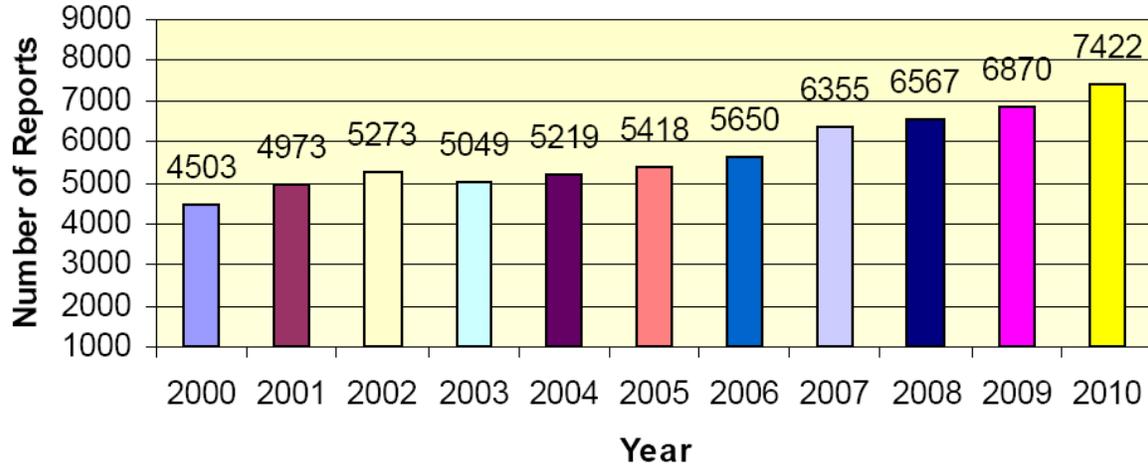


Demographics - Facts About California's Elderly

Map of the Percentage Increase of the Elderly Population Aged 60 and Over, Years 1990 to 2020

Appendix C: Orange County Adult Protective Services Fact Sheet

Unduplicated Reports Taken at OC Adult Abuse Registry



Orange County Adult Protective Services Fact Sheet

The number of reports received by APS increased 65% from 2000 through 2010 and 8% from 2009. Significant growth occurred from 1999 through 2002, after the implementation of SB 2199. A spike in the number of reports received occurred in 2007 when Financial Institutions became mandated reporters. Reports to APS continue to steadily increase.

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