SENIORS COUNCIL BOARD OF DIRECTORS

Thursday, April 15, 2021

10 a.m. – 12 Noon

ZOOM VIRTUAL MEETING
https://us02web.zoom.us/j/88044639222

One tap mobile
+12532158782,,88044639222# US (Tacoma)

Dial by your location
+1 669 900 6833 US (San Jose)

Meeting ID: 880 4463 9222

AGENDA

10 a.m.
1. Welcome, Call to Order and Introductions

2. Additions & Deletions to the Agenda

3. Receive Announcements from Board Members

4. Comments from Members of the Public on Items Not on the Agenda

5. CONSENT AGENDA
   Approve minutes of March 18, 2021 and March 26, 2021 Board Meetings

10:10 6. Committee Reports
   1. Finance Committee
      Consider Adoption of 2021-22 Salary Schedule
2. Nominating & Board Development
3. Executive Committee
4. Advocacy Committee

10:50  7. Adoption of 2021-22 Area Plan Update

11:00  8. Executive Director’s Report
   1. COVID-19 & Consideration of Employee Vaccine Policy
   2. Budget Outlook
   3. Developing & Delivering the Master Plan for Aging in PSA-13

11:30  9. Program Reports (as needed)
   1. Falls Prevention
   2. Foster Grandparent Senior Companion Program
   3. Area Agency on Aging
   4. ADRC/No Wrong Door
   5. Project SCOUT

11:50  10. Miscellaneous Correspondence & Other Items

12 Noon  11. Adjourn

Next Meeting:

Board of Directors: Thursday, May 21, 10 a.m. – 12 noon
Questions, Clarifications or Additional Information:

If you have a question or wish clarification or additional information about any agenda item or attached materials, please telephone Seniors Council Executive Director Clay Kempf at 688-0400 ext. 115 before the meeting. If you get voicemail, please leave a detailed message so that a response can be made.

Distribution of Materials:

If you have information to share with members of the Board, a table or other suitable space will be provided on which you may make it available. It is the wish of the Executive Committee that meetings not be disrupted by distribution of paperwork or other items.

Accessibility:

This organization attempts to make meeting content understandable in languages other than English. All Meeting rooms are accessible for people with disabilities. If you wish to discuss reasonable modifications or accommodations for language or disability, please contact the Seniors Council office at 688-0400 at least 48 hours before the meeting.

Seniors Council Mission Statement

It is the mission of the Seniors Council to enable older persons to function with independence and dignity in their homes and in the community to their fullest capacity.

Area Agency on Aging Mission

To provide leadership in addressing issues that relate to older Californians; to develop community-based systems of care that provide services which support independence within California’s interdependent society, and which protect the quality of life of older persons and persons with functional impairment; and to promote citizen involvement in the planning and delivery of services.
BOARD OF DIRECTORS
March 18, 2021
*Held by Zoom Conference Call in accordance with COVID-19 distancing
requirements*

MINUTES

BOARD MEMBERS PRESENT: Pam Arnsberger, Barbara Canfield, Darrell Johnson,
Barbara Kaiser, Wendy King, Mickie Luna, Steven Matzie, Wayne Norton, Antonio
Rivas, Jane Schwickerath, Gwen Yeo

ABSENT: Cathy Cress, Creighton Mendivil

OTHERS PRESENT: Clay Kempf, Executive Director; Patty Talbott, AAA;
Britt Bassoni, Special Projects; Rose Apodaca, guest

1. Welcome, Call to Order and Introductions
   Board President Pam Arnsberger called the meeting to order at 10:03 AM.

2. Additions and Deletions to the Agenda
   None.

3. Receive Announcements from Board Members
   Wayne said that he attended the C4A Capitol Day and thanked Clay for making an
   early morning presentation to the Rotary Club.

   Rose Apodaca introduced herself. She is from San Juan Bautista and is attending
   as an interested prospective Board member

4. Comments from Members of the Public on Items Not on the Agenda
   None.

5. Consent Agenda
   Board members were referred to pages 5-1 to 5-5, minutes of the February Board
   meeting. MOTION, Luna/King, to approve the minutes of the February 18, 2021 as
   submitted. PASSED Kaiser abstained

6. Presentation of 2019-20 Independent Financial Audit
   Clay said that the auditor is still finishing the audit. The audit needs to be turned in
   by March 31. Alternative is to schedule a special Board meeting so the Board can
   approve it or have the Executive Committee approve and have presentation later.
MOTION, Rivas/Norton to schedule a special Board meeting to hear the CPA audit presentation before March 31. PASSED unanimously. Clay will contact auditor for available times and send out a meeting Doodle. Patty noted that since action needs to be taken a quorum of at least seven Board members need to be in attendance.

7. Committee Reports

7.1 Finance Committee – Barbara Kaiser said the committee will meet next month and thanked Jane for her great report last month when Barbara could not attend.

7.2 Nominating and Board Development – Time for biannual membership terms. Roster was shared with term dates, please contact if you don’t want to continue. May will be nomination of officers, please consider becoming an officer, contact Gwen if interested.

7.3 Executive Committee – Pam reported that the committee looked at funding updates and reviewed C4A priorities: Nutrition, ADRC, Falls Prevention. Planning for Master Plan for Aging local launch May 19 will include Santa Cruz and San Benito Counties. Also discussed Live Oak Senior Center – meeting scheduled for April 22 with Supervisor Manu Koenig. Antonio asked to attend, Clay encouraged Antonio to contact Manu’s staff as they are designating the attendees. Gwen reported on the most recent meeting regarding Jovenes.

7.4 Advocacy Committee – Wayne referred to the report in packet. Local priority is the Live Oak Senior Center. Clay referred to C4A list of bills starting on Page 7-12. C4A will be reviewing and prioritizing. Looking at AB383 Mental Health AB665 internet access in SNF AB911 LTSS SB28 rural broadband and digital infrastructure (Caballero is author) SB107 streamlined application for CalFresh for older adults.

Referred to page 7-1 senior nutrition, ADRC, Falls Prevention and increased funding for AAAs (baseline funding has not been increased in 40 years). Already starting to think about what to focus on next year. Looking at Older Californians Act and how to reinvest in community-based service programs like Foster Grandparents.

Senior fact sheets are great places to bring forward talking points for legislative priorities. Patty will send out individual copies of each.

Wayne AB858 bring attention – raises the amount of personal needs money for residents of nursing homes from $35 a month, really needed and important, has been only $35 for years. Also tracking bills sponsored by John Laird and Robert Rivas. Good to be track legislation from local electeds. Pam expressed concern about rise attacks on Asian Americans, most of whom are elderly.

8. Executive Director’s Report

COVID Update. most staff continue to work from home most of the time. Katie Nunez at the Watsonville Senior Center reported that 60% of 65+ have been vaccinated.
As vaccines go out and cases go down, looking at how we reopen services. This was discussed at this week’s Aging & Disability Service Provider meeting, conversations continuing with state associations, public health, etc. Senior center directors invited to the next A&D meeting. Clay intends to take a cautious approach. Reopening brings up the prospect of office space and will need to revisit search for office space.

Project SCOUT – traditional model is sites throughout the county and people go to sites. A lot of VITA/TCE tax programs just shut down when COVID hit. Ed has tried to continue serving people safely, requires making appointments for scheduled drop offs, scan materials and email to volunteers. Had to put a cap on new requests for people who need to drop off materials, still offering online. If folks need to pay taxes they can request extension, if they’re getting a refund they can still apply late. Clay said the American Recovery Act includes additional tax credits.

Local funding. Scotts Valley voted again not to provide community program funding. Current AAA Advisory Council member Jack Dilles and former member Donna Lind strongly advocated for funding it. Capitola just sent out notice for current year community program funding, very short timeline. Watsonville will putting community program services out to bid. County and City of SC CORE program funding being discussed for next year. Normally applications are due in March. County of San Benito and City of Hollister continue to be easy to work with. City of Hollister funds AAA.

American Recovery Act rough estimate is it will similar to CARES Act, more ILIB dollars, need to find out if we’ll be able to transfer it. Clay good to look at EITC – (that’s not seniors). Really not movement on Age Friendly communities, meet on a regular basis with County staff. Master Plan for Aging, local toolkit and launch event will be on May 19, hosted by Agency on Aging Advisory Council. Electeds funders policy makers service providers older adults caregivers, etc. Clay provided an overview of event, which will include representative from CDA and hopefully from Independent Living Centers.

MOTION, Rivas/Luna, to allocate $37,500 to Jovenes de Antaño for purchase of a vehicle and warming oven for home-delivered meal delivery in San Benito County and $13,705 for the Seniors Council to purchase emergency response kits for distribution to vulnerable seniors in Santa Cruz and San Benito Counties. PASSED unanimously

9. Miscellaneous Correspondence
9.1 Falls Prevention – report in packet
9.2 Foster Grandparent/Senior Companion Program – no report
9.3 Area Agency on Aging – Patty referred to page 9.3, CDA approval letter for 2020-24 Area Plan on Aging. She is beginning work on the 2021-22 Update due to CDA on May 1. The draft will come to the Board for approval at the April meeting.
9.4 ADRC – No report in packet.
9.5 Project SCOUT - Report in packet. Project SCOUT is at capacity for
10. Miscellaneous Correspondence & Other Items

Page 10-1 flyer for latest webinar in the series the Seniors Council is doing with Kaiser and the Santa Cruz Warriors. Continuing with webinars with Kaiser and Santa Cruz Warriors. This month’s webinar featured AAA Registered Dietitian Caren Dix and was very well received. Board members are encouraged to attend them.

11. Adjournment

The meeting was adjourned at 11:35 PM

Next meeting – April 15

Minutes prepared by: Patty Talbott
BOARD OF DIRECTORS

Special Meeting convened for Presentation of Independent Financial Audit
March 26, 2021
*Held by Zoom Conference Call in accordance with COVID-19 distancing requirements*

MINUTES

BOARD MEMBERS PRESENT: Pam Arnsberger, Darrell Johnson, Barbara Kaiser, Steven Matzie, Creighton Mendivil, Wayne Norton, Antonio Rivas, Jane Schwickerath, Gwen Yeo

ABSENT: Barbara Canfield, Cathy Cress, Wendy King, Mickie Luna

OTHERS PRESENT: Clay Kempf, Executive Director; Cathy Colvard, Fiscal Officer; Hilary Minugh, Fiscal Specialist; Patty Talbott, AAA; Britt Bassoni, Special Projects; Krystal Weaver, CPA, Walters & Kondrasheff

1. Call to Order
   Board President Pam Arnsberger called the meeting to order at 1:21 P.M.

2. Presentation of 2019-20 Independent Financial Audit
   Cathy Colvard introduced Krystal Weaver, CPA with Walters & Kondrasheff, who presented the 2019-20 Independent Financial Audit.
   Ms. Weaver provided a review of all documents and exhibits contained in the audit report, and stated that this is a clean audit with no findings.
   She noted that there was a significant increase in revenue due primarily to funding related to COVID relief. Primary expense is pass through grants (AAA). Current agency admin rate is 8%. Net assets show a surplus of $250K at end of audit period. She provided a review of the detailed breakout of Federal and State funds contained in the audit report and reviewed required audit notes and stated that there were no deficiencies noted in financial reporting and no findings. Ms. Weaver confirmed that the date referred to in Note 22 will be the date the management letter is signed to accept the audit and certify agreement with the results. It was agreed that Clay and Jane will sign the letter by the morning of March 29 so that the audit can be submitted to the Audit Clearinghouse by the required date of March 31. MOTION, Norton/Rivas, to accept the 2019-20 Independent Financial Audit as presented. PASSED unanimously

3. Adjournment
   The meeting was adjourned at 2:00 PM.
   The next regular meeting of the Seniors Council Board will be April 15

Minutes prepared by: Patty Talbott
## Seniors Council of Santa Cruz and San Benito Counties

### Agency Wide Budget vs. Actual

**July 2020 through February 2021**

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<th>$ Over Budget</th>
<th>Annual Budget</th>
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**Expense**

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**CONTRACTED SERVICES**

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**EQUIPMENT**

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# Seniors Council of Santa Cruz and San Benito Counties

## Agency Wide Budget vs. Actual

**July 2020 through February 2021**

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Page 3 of 5
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Page 4 of 5
### Seniors Council of Santa Cruz and San Benito Counties

**Agency Wide Budget vs. Actual**

*July 2020 through February 2021*

<table>
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<tr>
<td>Net Income</td>
<td>335,245.81</td>
<td>212,316.29</td>
<td>122,930.52</td>
<td>63,329.20</td>
</tr>
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</table>
### ADOPTED 2020-2021 Salary Schedule
(3% COLA Increase Effective first payroll July 2020)

<table>
<thead>
<tr>
<th>POSITION</th>
<th>Entry</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
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<tbody>
<tr>
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<td>$31.08</td>
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<tr>
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<tr>
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<td>$35.96</td>
<td>$37.75</td>
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<td>$41.62</td>
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<tr>
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<td>$22.64</td>
<td>$23.77</td>
<td>$24.96</td>
<td>$26.21</td>
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<td>$19.25</td>
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<td>$21.22</td>
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<td>$23.40</td>
<td>$24.57</td>
<td>$25.79</td>
<td>$27.08</td>
</tr>
</tbody>
</table>

*English/Spanish speakers receive $0.75 per hour bilingual differential for bilingual required/preferred positions*

### PROPOSED 2021-2022 Salary Schedule
(1.6% COLA Increase Effective first payroll after July 1, 2021)

<table>
<thead>
<tr>
<th>POSITION</th>
<th>Entry</th>
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<th>5</th>
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<tr>
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<tr>
<td>FGP/SCP Program Director</td>
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<tr>
<td>CFL Program Director/Manager?</td>
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<td>$27.39</td>
<td>$28.76</td>
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<td>$31.70</td>
<td>$33.29</td>
<td>$34.95</td>
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<tr>
<td>Director of Programs &amp; Special Project</td>
<td>$27.26</td>
<td>$28.62</td>
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<td>$38.36</td>
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<tr>
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<td>$34.79</td>
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</tr>
<tr>
<td>Fiscal Assistant</td>
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<td>$28.76</td>
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<tr>
<td>Project SCOUT Program Manager</td>
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</tbody>
</table>
(Salas D)  Mental health: older adults.

Location: 2/12/2021-A. AGING & L.T.C.
Calendar: 4/6/2021 9 a.m. - State Capitol, Room 437  ASSEMBLY AGING AND LONG TERM CARE, NAZARIAN, Chair

Summary: Would establish within the State Department of Health Care Services an Older Adult Mental Health Services Administrator to oversee mental health services for older adults. The bill would require that position to be funded with administrative funds from the Mental Health Services Fund. The bill would prescribe the functions of the administrator and its responsibilities, including, but not limited to, developing outcome and related indicators for older adults for the purpose of assessing the status of mental health services for older adults, monitoring the quality of programs for those adults, and guiding decisionmaking on how to improve those services.

Position
Support
A

(Carrillo D)  Medi-Cal: eligibility.

Last Amend: 3/18/2021
Location: 3/18/2021-A. HEALTH
Summary: Would prohibit the use of resources, including property or other assets, to determine eligibility under the Medi-Cal program to the extent permitted by federal law, and would require the State Department of Health Care Services to seek federal authority to disregard all resources as authorized by the flexibilities provided pursuant to federal law. The bill would authorize the department to implement this prohibition by various means, including provider bulletins, without taking regulatory authority.

Position
Support
A

(Garcia, Eduardo D)  Residential care facilities for the elderly: basic services: internet access.

Location: 2/25/2021-A. HUM. S.
Summary: Current law provides for the licensure and regulation of residential care facilities for the elderly by the State Department of Social Services. A violation of these provisions is a misdemeanor. Current law requires a licensed residential care facility for the elderly to provide specified basic services, including, but not limited to, care and supervision, and helping residents gain access to appropriate supportive services. This bill would add to basic services required for a licensed residential care facility for the elderly, by requiring a facility that has internet service for business administration or entertainment purposes to provide at least one common internet access tool with microphone and camera functions, to enable residents to
participate in virtual visits or meetings in a manner that allows for discussion of personal or confidential information.

Position
Support
A

(Nazarian D)  Long-term services and supports.

Location:  2/25/2021-A. AGING & L.T.C.
Calendar:  4/6/2021 9 a.m. - State Capitol, Room 437  ASSEMBLY AGING AND LONG TERM CARE, NAZARIAN, Chair

Summary: Would establish the California Long-Term Services and Supports Benefits Board (LTSS Board), to be composed of 10 specified members, including, among others, the Treasurer as chair, the Secretary of California Health and Human Services as vice chair, and 3 members to be appointed by the Governor. The bill would require the LTSS Board to manage and invest revenue deposited in the California Long-Term Services and Supports Benefits Trust Fund (LTSS Trust), which the bill would create in the State Treasury, to, upon appropriation, finance long-term services and supports for eligible individuals. The bill would require the Long Term Supports and Services Subcommittee of the Master Plan on Aging to provide ongoing advice and recommendations to the board.

Position
Support
A

(Wiener D)  CalFresh.

Last Amend:  2/18/2021
Location:  3/23/2021-S. THIRD READING
Calendar:  3/25/2021 #27  SENATE SENATE BILLS -THIRD READING FILE

Summary: Would require the State Department of Social Services, in order to increase client access and retention within CalFresh, to participate in the Elderly Simplified Application Project, a demonstration project operated by the United States Department of Agriculture, Food and Nutrition Service. The bill would require the department, on or before January 1, 2023, to develop a CalFresh user-centered application for seniors 60 years of age or older and for people with disabilities who are eligible to be enrolled in the Elderly Simplified Application Project.

Position
Support
A

(Pan D)  Long-term services and supports.

Location:  2/25/2021-S. HUM. S.
Calendar:  4/6/2021 1:30 p.m. - John L. Burton Hearing Room (4203)  SENATE HUMAN SERVICES, HURTADO, Chair
Summary: Would establish the California Long-Term Services and Supports Benefits Board (LTSS Board), to be composed of 10 specified members, including, among others, the Treasurer as chair, the Secretary of California Health and Human Services as vice chair, and 3 members to be appointed by the Governor. The bill would require the LTSS Board to manage and invest revenue deposited in the California Long-Term Services and Supports Benefits Trust Fund (LTSS Trust), which the bill would create in the State Treasury, to, upon appropriation, finance long-term services and supports for eligible individuals. The bill would require the Long Term Supports and Services Subcommittee of the Master Plan on Aging to provide ongoing advice and recommendations to the board.

Position
Support
A

(Muratsuchi D) Broadband for All Act of 2022.

Last Amend: 3/16/2021
Location: 3/11/2021-A. C. & C.
Summary: Would enact the Broadband for All Act of 2022, which, if approved by the voters, would authorize the issuance of bonds in the amount of $10,000,000,000 pursuant to the State General Obligation Bond Law to support the 2022 Broadband for All Program that would be administered by the Department of Technology for purposes of providing financial assistance for projects to deploy broadband infrastructure and broadband services. The bill would provide for the submission of the bond act to the voters at the November 8, 2022, statewide general election.

Position
Support
B

(Frazier D) Health care: medical goods: reuse and redistribution.

Location: 1/11/2021-A. AGING & L.T.C.
Calendar: 4/6/2021 9 a.m. - State Capitol, Room 437 ASSEMBLY AGING AND LONG TERM CARE, NAZARIAN, Chair

Summary: Would require the California Department of Aging, upon appropriation by the Legislature, to establish a comprehensive 3-year pilot program in the Counties of Contra Costa, Napa, and Solano to facilitate the reuse and redistribution of durable medical equipment and other home health supplies. The bill would require the department to contract in each county with a local nonprofit agency to oversee the program and would require the contracting nonprofit agency to, at a minimum, develop a computerized system to track the inventory of equipment and supplies available for reuse and redistribution and organize pickup and delivery of equipment and supplies.
Last Amend: 3/18/2021
Location: 3/18/2021-A. AGRI.
Calendar: 4/15/2021 10:30 a.m. - State Capitol, Room 4202 ASSEMBLY AGRICULTURE, RIVAS, ROBERT, Chair

Summary: Would enact the Equitable Economic Recovery, Healthy Food Access, Climate Resilient Farms, and Worker Protection Bond Act of 2022, which, if approved by the voters, would authorize the issuance of bonds in the amount of $3,122,000,000, pursuant to the State General Obligation Bond Law, to finance programs related to, among other things, agricultural lands, food and fiber infrastructure, climate resilience, agricultural professionals, including farmers, ranchers, and farmworkers, workforce development and training, air quality, tribes, disadvantaged communities, nutrition, food aid, meat processing facilities, fishing facilities, and fairgrounds.

(Nazarian D)  Program of All-Inclusive Care for the Elderly.
Location: 2/18/2021-A. AGING & L.T.C.
Calendar: 4/6/2021 9 a.m. - State Capitol, Room 437 ASSEMBLY AGING AND LONG TERM CARE, NAZARIAN, Chair

Summary: Current state law establishes the California Program of All-Inclusive Care for the Elderly (PACE program), to provide community-based, risk-based, and capitated long-term care services as optional services under the state’s Medi-Cal State Plan, as specified. Current law authorizes the State Department of Health Care Services to enter into contracts with various entities for the purpose of implementing the PACE program and fully implementing the single state agency responsibilities assumed by the department pursuant to those contracts, as specified. This bill would require the department to make permanent the specified PACE program flexibilities instituted, on or before January 1, 2021, in response to the state of emergency caused by the 2019 novel coronavirus (COVID-19) through all-facility letters, or other similar instructions taken without regulatory action. The bill would require the department to work with the federal Centers for Medicare and Medicaid Services to determine how to extend PACE flexibilities approved during the COVID-19 emergency.

(Calderon D)  Medi-Cal: monthly maintenance amount: personal and incidental needs.
Location: 3/23/2021-A. APPR.
Summary: Current law requires the State Department of Health Care Services to establish income levels for maintenance need at the lowest levels that reasonably permit a medically needy person to meet their basic needs for food, clothing, and shelter, and for which federal financial participation will still be provided under applicable federal law. In calculating the income of a medically needy person in a medical institution or nursing facility, or a person receiving institutional or noninstitutional services from a Program of All-Inclusive Care for the Elderly organization, the required monthly maintenance amount includes an amount providing for personal and incidental needs in the amount of not less than $35 per month while a patient. Current law authorizes the department to increase, by regulation, this amount as necessitated by increasing costs of personal and incidental needs. This bill would increase the monthly maintenance amount for personal and incidental needs from $35 to $80, and would require the department to annually adjust that amount by the same percentage as the Consumer Price Index.

Position
Support
B

(Reyes D) Skilled nursing facilities: intermediate care facilities: liability.

Location: 2/25/2021-A. HEALTH
Summary: Current law authorizes a current or former resident or patient of a skilled nursing facility or intermediate care facility, as defined, to bring a civil action against the licensee of a facility who violates any of specified rights of the resident or patient or any other right provided for by federal or state law or regulation. Current law makes the licensee liable for up to $500. This bill would make the licensee liable for up to $500 per violation.

Position
Support
B

(Atkins D) Affordable Housing Bond Act of 2022.

Last Amend: 3/10/2021
Location: 3/18/2021-S. HOUSING
Summary: Would enact the Affordable Housing Bond Act of 2022, which, if adopted, would authorize the issuance of bonds in the amount of $6,500,000,000 pursuant to the State General Obligation Bond Law. Proceeds from the sale of these bonds would be used to fund affordable rental housing and homeownership programs. The bill would state the intent of the Legislature to determine the allocation of those funds to specific programs. This bill would provide for submission of the bond act to the voters at the November 8, 2022, statewide general election in accordance with specified law.

Position
Support
B

(Caballero D) Rural Broadband and Digital Infrastructure Video Competition Reform Act of 2021.
**SB 48**

**Dementia and Alzheimer’s disease.**

**Last Amend:** 3/9/2021  
**Location:** 3/23/2021-S. THIRD READING  
**Calendar:** 3/25/2021 #24 SENATE SENATE BILLS -THIRD READING FILE

**Summary:** Would require all general internists and family physicians to complete at least 4 hours of mandatory continuing education on the special care needs of patients with dementia.

Position  
Support  
B

**SB 258**

**Aging.**

**Location:** 3/9/2021-S. APPR.  
**Summary:** Current law requires the California Department of Aging, in allocating specified state and federal funding to area agencies on aging, to ensure that priority consideration is given to criteria that reflect the state’s intent to target services to those in greatest economic or social need. Existing law defines “greatest social need” to mean the need caused by noneconomic factors, including physical and mental disabilities, that restrict an individual’s ability to perform normal daily tasks or that threaten the individual’s capacity to live independently. This bill would revise this definition to include human immunodeficiency virus (HIV) status as a specified noneconomic factor.

Position  
Support  
B

**Laird D**
(Dodd D)  Medi-Cal: California Community Transitions program.

Last Amend: 3/18/2021  
Location: 3/18/2021-S. APPR. 
Summary: Current law requires the State Department of Health Care Services to provide services consistent with the Money Follows the Person Rebalancing Demonstration for transitioning eligible individuals out of an inpatient facility who have not resided in the facility for at least 90 days, and to cease providing those services on January 1, 2024. Current law repeals these provisions on January 1, 2025. This bill would instead require the department to provide those services for individuals who have not resided in the facility for at least 60 days, and would make conforming changes. The bill would extend the provision of those services to January 1, 2029, and would extend the repeal date of those provisions to January 1, 2030.

Position
Support  
B

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(Arambula D)  Medi-Cal: eligibility.

Location: 1/11/2021-A. HEALTH  
Summary: Would, effective January 1, 2022, extend eligibility for full scope Medi-Cal benefits to anyone regardless of age, and who is otherwise eligible for those benefits but for their immigration status, pursuant to an eligibility and enrollment plan. The bill would delete the specified provisions regarding individuals who are under 25 years of age or 65 years of age or older and delaying implementation until the director makes the determination described above. The bill would require the eligibility and enrollment plan to ensure that an individual maintains continuity of care with respect to their primary care provider, as prescribed, would provide that an individual is not limited in their ability to select a different health care provider or Medi-Cal managed care health plan, and would require the department to provide monthly updates to the appropriate policy and fiscal committees of the Legislature on the status of the implementation of these provisions.

Position
Support  
C

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(Aguiar-Curry D)  Communications: broadband services: California Advanced Services Fund.

Location: 1/11/2021-A. C. & C.  
Summary: Current law establishes the State Department of Education in state government, and vests the department with specified powers and duties relating to the state’s public school system. This bill would authorize local educational agencies to report to the department their pupils’ estimated needs for computing devices and internet connectivity adequate for at-home learning. The bill would require the department, in consultation with the Public Utilities Commission, to compile that information and to annually post that compiled information on the department’s internet website.
(Aguiar-Curry D)  Telehealth.

Last Amend: 2/12/2021  
Location: 1/11/2021-A. HEALTH

Summary: Current law requires a health care service plan contract or health insurance policy issued, amended, or renewed on or after January 1, 2021, to specify that coverage is provided for health care services appropriately delivered through telehealth on the same basis and to the same extent as in-person diagnosis, consultation, or treatment. Current law exempts Medi-Cal managed care plans that contract with the State Department of Health Care Services under the Medi-Cal program from these provisions, and generally exempts county organized health systems that provide services under the Medi-Cal program from Knox-Keene. This bill would delete the above-described references to contracts issued, amended, or renewed on or after January 1, 2021, would require these provisions to apply to the plan or insurer’s contracted entity, as specified, and would delete the exemption for Medi-Cal managed care plans. The bill would subject county organized health systems, and their subcontractors, that provide services under the Medi-Cal program to the above-described Knox-Keene requirements relative to telehealth.

(Gonzalez, Lorena D)  Paid family leave: weekly benefit amount.

Location: 1/11/2021-A. INS.
Calendar: 4/15/2021 10:30 a.m. - State Capitol, Assembly Chamber  ASSEMBLY INSURANCE, DALY, Chair

Summary: Current law establishes, within the Unemployment Compensation Disability Fund program, a family temporary disability insurance program, also known as the paid family leave program, for the provision of wage replacement benefits for up to 8 weeks to workers who take time off work to care for a seriously ill family member or to bond with a minor child within one year of birth or placement, as specified. Current law defines “weekly benefit amount” for purposes of both employee contributions and benefits under this program to mean the amount of weekly benefits available to qualifying disabled individuals pursuant to unemployment compensation disability law, calculated pursuant to specified formulas partly based on the applicable percentage of the wages paid to an individual for employment by employers during the quarter of the individual’s disability base period in which these wages were highest, but not to exceed the maximum workers’ compensation temporary disability indemnity weekly benefit amount established by the Department of Industrial Relations. This bill would revise the formula for determining benefits available pursuant to the family temporary disability insurance program, for periods of disability commencing after January 1, 2022, by redefining the weekly benefit amount to be equal to 90% of the wages paid to an individual for employment by employers during the quarter of the individual’s disability base period in which these wages were highest, divided by 13, but not exceeding the maximum workers’ compensation temporary disability indemnity weekly benefit amount established by the Department of Industrial Relations.
**AB 540**

**Petrie-Norris D)** *Program of All-Inclusive Care for the Elderly.*

**Location:** 2/18/2021-A. AGING & L.T.C.
**Calendar:** 4/6/2021 9 a.m. - State Capitol, Room 437 ASSEMBLY AGING AND LONG TERM CARE, NAZARIAN, Chair

**Summary:** Current state law establishes the California Program of All-Inclusive Care for the Elderly (PACE program) to provide community-based, risk-based, and capitated long-term care services as optional services under the state’s Medi-Cal State Plan, as specified. Current law authorizes the State Department of Health Care Services to enter into contracts with various entities for the purpose of implementing the PACE program and fully implementing the single-state agency responsibilities assumed by the department in those contracts, as specified. This bill would exempt a beneficiary who is enrolled in a PACE organization with a contract with the department from mandatory or passive enrollment in a Medi-Cal managed care plan.

**Position**
Support
C

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**AB 636**

**Maienschein D)** *Financial abuse of elder or dependent adults.*

**Location:** 2/25/2021-A. AGING & L.T.C.
**Calendar:** 4/6/2021 9 a.m. - State Capitol, Room 437 ASSEMBLY AGING AND LONG TERM CARE, NAZARIAN, Chair

**Summary:** Current law makes specified reports, including reports of known or suspected financial abuse of an elder or dependent adult, confidential. Current law requires information relevant to the incident of elder or dependent adult abuse to be given to specified investigators, including investigators from an adult protective services agency, a local law enforcement agency, and the probate court. This bill would also authorize information relevant to the incident of elder or dependent adult abuse to be given to a federal law enforcement agency charged with the investigation of elder or dependent adult abuse or to a local code enforcement agency for the sole purpose of investigating a property where the health and safety of an elder or dependent adult resident is at risk.

**Position**
Support
C

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**AB 1083**

**Nazarian D)** *Senior affordable housing: nursing pilot program.*

**Location:** 3/4/2021-A. AGING & L.T.C.
**Calendar:** 4/20/2021 9 a.m. - State Capitol, Room 437 ASSEMBLY AGING AND LONG TERM CARE, NAZARIAN, Chair
Summary: Would require the California Department of Aging to establish and administer the Housing Plus Services Nursing Pilot Program in the Counties of Los Angeles, Orange, Riverside, Sacramento, and Sonoma. The program would provide grant funds to qualified nonprofit organizations that specialize in resident services for the purposes of hiring one full-time registered nurse to work at 3 senior citizen housing developments in each county to provide health education, navigation, coaching, and care to residents. The bill would require the department to submit a report to specified legislative committees and state agencies on or before January 1, 2026, and would repeal the program as of January 1, 2027.

Position
Support
C

SB 56

(Durazo D) Medi-Cal: eligibility.

Last Amend: 3/1/2021
Location: 3/22/2021-S. APPR. SUSPENSE FILE
Summary: Current law provides that Medi-Cal benefits for individuals who are 65 years of age or older, and who do not have satisfactory immigration statuses or are unable to establish satisfactory immigration statuses, will be prioritized in the Budget Act for the upcoming fiscal year if the Department of Finance projects a positive ending balance in the Special Fund for Economic Uncertainties for the upcoming fiscal year and each of the ensuing 3 fiscal years that exceeds the cost of providing those individuals full scope Medi-Cal benefits. This bill would, subject to an appropriation by the Legislature, and effective July 1, 2022, extend eligibility for full-scope Medi-Cal benefits to individuals who are 65 years of age or older, and who are otherwise eligible for those benefits but for their immigration status.

Position
Support
C

SB 256

(Pan D) Medi-Cal: covered benefits.

Location: 2/3/2021-S. HEALTH
Summary: Current federal law authorizes specified managed care entities that participate in a state’s Medicaid program to cover, for enrollees, services or settings that are in lieu of services and settings otherwise covered under a state plan. This bill would require those mandatorily developed health-plan- and county-specific rates for specified Medi-Cal managed care plan contracts to include in lieu of services and settings provided by the Medi-Cal managed care plan. The bill would require each Medi-Cal managed care plan to disclose the availability of in lieu of services on its internet website and its beneficiary handbook, and to disclose to the department specified information on in lieu of services that are plan specific, including the number of people receiving those services. The bill would require the department to publish that information on its internet website.

Position
Support
C

6.4.10
**SB 591**

**(Becker D)**  Senior citizens: intergenerational housing developments.

**Location:** 3/4/2021-S. JUD.

**Calendar:** 4/6/2021  1:30 p.m. - Senate Chamber  SENATE JUDICIARY, UMBERG, Chair

**Summary:** Current law requires the covenants, conditions, and restrictions or other documents or written policy of a senior citizen housing development to set forth the limitations on occupancy, residency, or use on the basis of age. Current law requires that the limitations on age require, at a minimum, that the persons commencing any occupancy of a dwelling unit include a senior citizen who intends to reside in the unit as their primary residence on a permanent basis. Current law defines “senior citizen housing development” for these purposes as a residential development for senior citizens that has at least 35 dwelling units. Current law defines “qualifying resident” or “senior citizen” to mean a person 62 years of age or older, or 55 years of age or older in a senior citizen housing development. This bill would, among other things, permit the covenants, conditions, and restrictions to permit the establishment of an intergenerational housing development that includes senior citizens along with caregivers and transition age youths.

Position

Support

C

**AB 71**


**Last Amend:** 1/12/2021

**Location:** 1/15/2021-A. REV. & TAX

**Summary:** Would, for taxable years beginning on or after January 1, 2022, include a taxpayer’s global low-taxed income in their gross income for purposes of the Personal Income Tax Law, in modified conformity with the above-described federal provisions. The bill would exempt any standard, criterion, procedure, determination, rule, notice, or guideline established or issued by the Franchise Tax Board to implement its provisions from the rulemaking provisions of the Administrative Procedure Act.

Position

Watch

**AB 279**

**(Muratsuchi D)**  Intermediate care facilities and skilled nursing facilities.

**Location:** 1/28/2021-A. HEALTH

**Summary:** Would prohibit the owner of an ICF or SNF from ceasing to deliver or making significant changes to the nature of residential care services, or from transferring a resident to another facility, during any declared state of emergency relating to the coronavirus disease 2019 (COVID-19), except if the owner files for bankruptcy. The bill would require, upon termination of the same type of state of emergency, the owner of an ICF or SNF to issue a
6-month advance notice of any proposed sale or termination of the licensed operation of the facility to each resident before the sale or termination goes into effect. The bill would also prohibit during the same type of state of emergency, any changes in all conditions for the sale of assets imposed by the Attorney General, except if the owner of an ICF or SNF files for bankruptcy.

Position

Watch

(Arambula D) Elder and dependent adults.
Location: 2/25/2021-A. AGING & L.T.C.
Calendar: 4/20/2021 9 a.m. - State Capitol, Room 437 ASSEMBLY AGING AND LONG TERM CARE, NAZARIAN, Chair

Summary: Current law requires each county welfare department to establish and support a system of protective services for elderly and dependent adults who may be subjected to neglect, abuse, or exploitation or who are unable to protect their own interests. Current law authorizes, in certain circumstances, an elder or dependent adult to be taken into temporary emergency protective custody. For the purposes of the above-described provisions, existing law defines an elder as a person who is 65 years of age or older and a dependent adult as an adult between 18 and 64 years of age who has specific limitations.

Position

Watch

(Voepel R) Senior legal services.
Location: 2/25/2021-A. AGING & L.T.C.
Calendar: 4/6/2021 9 a.m. - State Capitol, Room 437 ASSEMBLY AGING AND LONG TERM CARE, NAZARIAN, Chair

Summary: Current law requires the California Department of Aging to establish a task force of certain members to study and make recommendations to the Legislature on the improvement of legal services delivery to senior citizens in California by exploring specified matters, including ways to ensure uniformity in the provision of legal services throughout the state and the possible establishment of a statewide legal hotline for seniors. Current law requires the task force to report and make its recommendations to the Legislature on or before September 1, 2002. This bill would require the department to establish a similar task force to assess the implementation of the recommendations made pursuant to the above-mentioned provisions, make additional recommendations by exploring the same matters explored by the initial task force, and to report the assessment and make its recommendations to the Legislature on or before September 1, 2023.

Position

Watch
(Quirk-Silva D) PACE program: risk mitigation program.

Last Amend: 3/18/2021  
Location: 3/18/2021-A. REV. & TAX  
Summary: Existing law also requires the California Alternative Energy and Advanced Transportation Financing Authority to develop and administer a PACE risk mitigation program for PACE financing to increase its acceptance in the marketplace and protect against the risk of default and foreclosure. This bill would require the authority, upon an appropriation by the Legislature for purposes of the bill, to develop and administer the PACE risk mitigation program to address residential PACE-related mortgage and tax delinquencies in order to avoid default or foreclosure by awarding a grant, in an amount equal to at least one annual PACE assessment but not more than 4 annual PACE assessments, to an eligible property owner, as defined. The bill would require the authority to award the grants on a first-come, first-served basis.

Position  
Watch

(Holden D) Residential care facilities: conditions.

Last Amend: 3/18/2021  
Location: 3/18/2021-A. HUM. S.  
Calendar: 4/7/2021 1:30 p.m. - State Capitol, Room 4202 ASSEMBLY HUMAN SERVICES, CALDERON, Chair  
Summary: The California Residential Care Facilities for the Elderly Act generally requires the State Department of Social Services to license, inspect, and regulate residential care facilities for the elderly and imposes criminal penalties on a person who violates the act or who willfully or repeatedly violates any rule or regulation adopted under the act. This bill would require the department, on or before July 1, 2022, and every month thereafter, to post on its internet website every inspection report for every licensed residential care facility for the elderly within 5 years from the date of posting.

Position  
Watch

(Arambula D) Skilled nursing facilities: intermediate care facilities: feeding assistants.  

Location: 3/4/2021-A. HEALTH  
Summary: Would authorize a skilled nursing facility or intermediate care facility to adopt a feeding assistant training program and would require the department to approve a feeding assistant training program for facilities to adopt that meets specified requirements. The bill would require skilled nursing facilities and intermediate care facilities that utilize feeding assistants to comply with certain requirements, including that a feeding assistant only provide dining assistance for residents who have no complicated feeding problems. The bill would also specify that hours of care provided by a feeding assistant may be used in determining whether a facility satisfies direct care service hour, or nursing hour, per patient day requirements.
(Rubio, Blanca D)  Protective orders: elder and dependent adults.

Location: 3/4/2021-A. JUD.
Summary: Current law authorizes an elder or dependent adult who has suffered abuse, or another person who is legally authorized to seek that relief on behalf of that elder or dependent adult, to seek a protective order and governs the procedures for issuing that order. Current law defines protective order for purposes of these provisions to include an order enjoining a party from specified forms of abuse, including attacking, stalking, threatening, or harassing an elder or dependent adult, an order excluding a party from the elder or dependent adult’s residence, or an order enjoining a party from specified behavior that the court determines is necessary. This bill would require an action seeking a protective order, as described above, to be heard in the probate or family division of the superior court.

(Ting D)  Surplus land.

Last Amend: 3/11/2021
Location: 3/11/2021-A. L. GOV.
Summary: Current law, beginning January 1, 2021, imposes a penalty for violation of specified surplus land provisions after a local agency receives the notification from the Department of Housing and Community Development and a penalty for subsequent violations. Current law authorizes specified entities or persons to bring an action against a local agency to enforce the provisions related to surplus land and allows a local agency 60 days to cure or correct an alleged violation before the action may be brought, except as specified. This bill would provide that these surplus land provisions do not preclude a local agency that purchases surplus land from a disposing agency from reconveying the surplus land to a nonprofit or for-profit housing developer for development of low- and moderate-income housing as authorized under other provisions of law.

(Voepel R)  Residential care facilities for the elderly: electronic monitoring.

Location: 3/4/2021-A. HUM. S.
Calendar: 4/7/2021 1:30 p.m. - State Capitol, Room 4202  ASSEMBLY HUMAN SERVICES, CALDERON, Chair

Summary: Would enact the Electronic Monitoring in Residential Care Facilities for the
Elderly Act to authorize the use of electronic monitoring devices either inside a resident’s room by a resident or in certain areas of a facility by the facility under specified conditions. For the use of a personal electronic monitoring device inside a resident’s room by a resident, the bill would require, among other things, the resident or the resident’s representative, as defined, to provide the facility with a completed notification and consent form, as specified, that includes the consent of the resident’s roommate, if any. The bill would also require the resident or the resident’s representative to post a sign at the entrance to the resident’s room stating that the room is monitored electronically.

Position

Watch

(Rivas, Robert  D)  Residential care facilities for the elderly.

Location: 2/19/2021-A. PRINT
Summary: Current law provides for the licensure and regulation of residential care facilities for the elderly by the State Department of Social Services. A violation of these provisions is a misdemeanor. Current law requires a licensed residential care facility for the elderly to provide specified basic services. This bill would make technical, non-substantive changes to these provisions.

Position

Watch

(Muratsuchi D)  Freestanding skilled nursing facilities.

Last Amend: 3/22/2021
Location: 3/11/2021-A. HEALTH
Summary: Current law prohibits a person from acquiring a beneficial interest of 5 percent or more in any corporation or partnership licensed to operate a skilled nursing facility, or in any management company under contract with a licensee of a skilled nursing facility, or from becoming an officer or director of, or general partner in, a corporation, partnership, or management company without the prior written approval of the State Department of Public Health. Current law requires a licensee for a skilled nursing facility to provide written notice of a proposed change in licensee or management company to all residents of the facility and their representatives at least 90 days prior to a finalization of the sale, transfer of operation, or other change or transfer of ownership interests, except as specified. Current law imposes criminal penalties on a person who violates the licensing and regulatory requirements imposed on skilled nursing facilities. This bill would prohibit a person, firm, entity, partnership, trust, association, corporation, or political subdivision of the state, or other governmental agency within the state from acquiring, operating, establishing, managing, conducting, or maintaining a freestanding skilled nursing facility without first obtaining a license from the department for that purpose.

Position

Watch
SB 4

(Gonzalez D) Communications: California Advanced Services Fund.

Location: 1/28/2021-S. E. U., & C.
Calendar: 4/12/2021 Upon adjournment of Session - Senate
Chamber SENATE ENERGY, UTILITIES AND COMMUNICATIONS, HUESO, Chair

Summary: Current law establishes the Governor’s Office of Business and Economic Development, known as “GO-Biz,” within the Governor’s office to serve the Governor as the lead entity for economic strategy and the marketing of California on issues relating to business development, private sector investment, and economic growth. This bill would require the office to coordinate with other relevant state and local agencies and national organizations to explore ways to facilitate streamlining of local land use approvals and construction permit processes for projects related to broadband infrastructure deployment and connectivity.

Position

Watch

SB 460

(Pan D) Long-term health facilities: patient representatives.

Last Amend: 3/16/2021
Location: 3/23/2021-S. HEALTH
Summary: Would create the Office of the Patient Representative in the Department of Aging to train, certify, provide, and oversee patient representatives to protect the rights of nursing home residents, as specified. The bill would, among other things, require the office to establish appropriate eligibility, training, certification, and continuing education requirements for patient representatives and to convene a group of stakeholders to advise the office regarding the eligibility requirements. The bill would, among other things, require the office to collect and analyze data, including the number of residents represented, the number of interdisciplinary team meetings attended, and the number of cases in which judicial review was sought and to present that data in an annual public report delivered to the Legislature and posted on the office’s internet website.

Position

Watch

SB 648

(Hurtado D) Care facilities.

Location: 3/3/2021-S. HUM. S.
Calendar: 4/20/2021 1:30 p.m. - John L. Burton Hearing Room (4203) SENATE HUMAN SERVICES, HURTADO, Chair

Summary: Would provide that a resident in an adult residential facility or a residential care facility for the elderly in which at least 75 percent of the residents receive benefits pursuant to the State Supplementary Program for the Aged, Blind, and Disabled is also eligible to receive IHSS following an assessment for IHSS. The bill would authorize an adult residential facility or residential care facility to receive up to 60 hours of IHSS a week and would require an adult residential facility or residential care facility that receives benefits pursuant to those provisions
to use the savings derived from IHSS towards certain expenses, including, among others, facility upkeep or upgrades.

Position

Watch
DATE: April 9, 2021

TO: AAA Advisory Council
    Seniors Council Board of Directors

FROM: Patty Talbott, Planner

RE: 2021-22 Update to the 2020-24 AREA PLAN

Included with this report is the draft summary of the 2021-22 Update to the 2020-24 Area Plan. This report summarizes the key components of the full Area Plan including:

- **Goals and objectives.** No changes to goals, updates to objectives highlighted. Please note that objectives with a "PD" or "C" are funded with a very small amount of allowable direct service Title IIIIB funding which must be approved by the Department of Aging.

- **Proposed service units and funding.** As we are in the final year of our contract cycle and there is no significant change in our Area Plan funding for 2021-22, there are no service changes proposed.

Services in the plan do not reflect additional services funded by COVID relief funding. These services may not be included in the Area Plan and are tracked separately.

Our providers are currently in what would have been the last year of a 4-year funding cycle, but due to the pandemic, the Department of Aging allowed a 1-year extension of contracts. **Therefore, the Requests for Proposal for services will take place in Fall/Winter of 2021-22 and the next 4-year contract cycle will begin in July of 2022.**

The Area Plan is a comprehensive document that is nearly 75 pages long. It is completed in accordance with a prescribed template provided by the California Department of Aging, and the content required is very specific. The summary report will be posted on our website throughout the month, and is being distributed throughout our network including relevant commissions. The full draft Update will also be posted to our website. The Update will be finalized for submittal to CDA on May 1.

**ACTION REQUESTED**

- Review draft Update summary, discuss any feedback, questions or comments
- Approve draft Area Plan Update Summary
AREA AGENCY ON AGING
FOR SANTA CRUZ AND SAN BENITO COUNTIES
Committed to maximizing the health and independence of seniors since 1979

2020-24
AREA PLAN ON AGING
2021-22 UPDATE
SUMMARY REPORT

PLANNING AND SERVICE AREA 13
Santa Cruz and San Benito Counties

DRAFT

234 Santa Cruz Avenue, Aptos, CA 95003
Phone: 831-688-0400 x119
www.seniorscouncil.org

Written questions or comments on the draft must be received by April 23
and should be addressed to Patty Talbott, AAA Planner at pattyt@seniorscouncil.org.
OVERVIEW OF THE AREA AGENCY ON AGING

WHAT IS THE AREA AGENCY ON AGING?

For over 40 years, the Seniors Council has been the designated Area Agency on Aging (AAA) for Santa Cruz and San Benito Counties, part of a network of 33 such agencies in California. So what does an Area Agency on Aging do?

- **Assess** the needs of seniors.
- **Advocate** at the local and state level for the needs of seniors.
- **Provide visible leadership** on senior issues in the community by monitoring and evaluating and commenting, or providing technical support on issues affecting seniors.
- **Plan for services** for the more than 81,000 seniors (age 60+) in Santa Cruz and San Benito Counties, and ensure that all senior services are well-coordinated.
- **Receive and allocate Older Americans Act funding and Health Insurance Counseling and Advocacy Program funds in our two-county planning region.** During Program Year 2020-21 these funds totaled more $2 million. Nearly all program funding contracted out to local service providers.
- **Ensure that AAA-funded programs provide quality, efficient, effective services** that meet all OAA program and regulatory requirements and service delivery methods.
- **Ensure that the senior service delivery network is well-coordinated.**
- **Monitor emerging needs and support the development of innovative programs,** during 2020-21 this included coordinating and overseeing any COVID-related service delivery modifications and innovative programs such as grocery shopper services.

WHO DO WE SERVE?

- In general, Older Americans Act programs are available to those **age 60 or older.** Some programs, such as Family Caregiver Support are available to those under 60.
- **Programs are available to all seniors, but the Act that services are targeted to those in greatest economic and social need.**
- **More than half of clients receiving meals through our nutrition programs reported incomes at or below the federal poverty level.**

The California Department of Aging estimates that in 2021, the 60+ population is:

- Santa Cruz County: 67,628 persons age 60 or older with 17,484 age 75+
- San Benito County: 13,594 persons age 60 or older with 3,737 age 75+

*Source: California Department of Finance Population Projections.*

1-3
THE AREA AGENCY ON AGING PLANNING AND CONTRACT CYCLE

Assess needs ➔ Develop a plan ➔ Allocate Funds ➔ Ensure Quality & Accountability

ASSESSING LOCAL NEEDS
The federal Older Americans Act required the establishment of local Area Agencies on Aging. Local planning allows areas to tailor program funding to the unique needs and resources in each area. Every four years, the AAA conducts a senior needs assessment survey, which is the foundation of the planning process. **It also provides an important opportunity for seniors to participate directly in the planning process, and for their voices to be heard.** Some issues identified can be addressed with program funding, while others become advocacy priorities.

Nearly 900 seniors completed and returned during the survey. The top 10 self-identified needs identified were, in order:
1. Maintaining Home/Yard Work
2. Doing Housework
3. Understanding Medicare/Medi-Cal
4. Paying for dental care
5. Paying for Help in My Home if I Need It
6. Finding Reliable Help if I Need it
7. Feeling Sad or Depressed
8. Feeling Lonely or Isolated
9. No money saved for emergencies*
10. Paying for Healthcare Costs mortgage or rent

These needs and others identified in the senior needs assessment survey, are incorporated into our planning, requests for proposals as well as local and state advocacy efforts.

DEVELOPING A PLAN
We then prepare the 4-year Area Plan on Aging for submittal to the California Department on Aging. **The plan outlines what our goals are and what services that will be provided with the federal and state program funds.** It also highlights the AAA’s unique role in providing advocacy and leadership on senior issues and ensuring a well-coordinated senior service delivery network. The Plan and its annual updates are submitted to the California Department of Aging for review and approval. The 2021-22 program year will be the second year of the four-year Area Plan.

ALLOCATING FUNDS
The funding for Area Agency on Aging programs originates at the federal level with the Older Americans Act, and is augmented by state matching funds. These funds come in specific service categories. AAA’s are also required to obtain local matching funds, these local funds are critical to service delivery. Typically, Area Agency on Aging services are put out to bid every four years and 2020-21 would have been the final year of the 4-year funding cycle for AAA-contractors. However, due to the COVID emergency, the California Department of Aging granted AAA’s the
authority to extend contracts for an additional year. Therefore, current provider contracts will be extended through June 30, 2022. During Program Year 2021-22, the AAA will complete a Request for Proposals for services for the next funding cycle. Approved service providers will be awarded funds on a 4-year funding cycle, with one-year renewable contracts, pending funding availability and provided that the provider remains in good standing with contract terms.

**ENSURING QUALITY & ACCOUNTABILITY**

Services provided by the AAA and its contracted services providers must fully comply with state and federal requirements for Older Americans Act programs, including a requirement to target services to seniors in greatest need, which includes low-income and ethnic minority seniors. All contracted providers receive ongoing desk monitoring, technical support as needed, and on site visits at least every two years. Nutrition programs receive annual onsite monitoring and quarterly reviews. The AAA is regulated and monitored by the California Department of Aging, by a publicly-appointed AAA Advisory Council and by the Seniors Council Board of Directors.

**RESPONDING TO UNPRECEDEDENT CHALLENGES**

The COVID pandemic literally changed the landscape of senior service delivery overnight. From the lockdowns of nursing homes, care facilities and congregate living, to closures of congregate dining sites, business shut downs and stay at home orders all thrust many seniors and other at risk populations into immediate isolation. The disconnection from essential services, family and friends and familiar routines had profound impacts.

As senior programs quickly pivoted to new service models, they also struggled with the challenges of implementing new workspace and business practices to keep staff and volunteers safe. Many programs rely heavily on volunteers for their operations, most of whom are seniors themselves. A decrease in available volunteers combined with increased demand for services such as meals created many challenges for service delivery. And for the first time in its history, Ombudsman staff and volunteers were locked out of facilities, losing the ability to do much-needed visitation and facility monitoring when residents were at their most vulnerable.

As providers were struggling to meet all of these challenges, the CZU Lightning Complex fires in Santa Cruz County destroyed over 900 homes, displacing thousands of residents and burning tens of thousands of acres. Service providers worked diligently to track their most vulnerable participants to ensure their safety and provide services when possible.

**The AAA service provider network rises to the occasion.** The AAA service provider network and the senior service delivery network as whole was truly put to the test during these challenging times. Through the use of both time-tested service models and innovative modifications our network continues to provide high quality, essential services to seniors in Santa Cruz and San Benito Counties. We are proud to support this network of dedicated service providers. We will continue to be here for seniors through the pandemic and into the future.
PROPOSED CHANGES FOR 2021-22 AREA PLAN UPDATE

2021-22 FUNDING: Funding awards for 2021-22 have not yet been released. At this time, we have not received confirmation of any changes to funding levels for Older Americans Act Programs from 2020-21 levels.

2021-22 SERVICE DELIVERY: Proposed service units for Older Americans Act programs will be relatively unchanged. If funding is increased or decreased, service units will be renegotiated with contracted service providers if necessary. During the COVID pandemic, additional services funded by federal relief funds must be tracked and reported separately and are therefore not reflected in the Area Plan.

2021-22 GOALS AND OBJECTIVES:
- No changes are proposed to the four goals.
- Proposed revisions to existing objectives are in blue.

PRIORITIES FOR THE AREA AGENCY ON AGING IN 2021-22
- Continue to monitor the changing landscape of service delivery during the COVID pandemic and ensure safe delivery of AAA-funded services with modifications as approved as communities move towards reopening.
- Ensure effective distribution and use of additional COVID response funding.
- Promote equity and inclusion in all facets of service delivery.
- Provide visible leadership at the State level as a member of the State Master Plan on Aging Steering Committee and with continued advocacy in Sacramento, providing testimony on senior funding issues as needed.
- Provide expertise and technical support for local projects related to senior issues.
- Continue work towards implementation of an Aging and Disability Resource Connection in San Benito County.
- Provide effective falls prevention services including Matter of Balance classes, in home assessments and availability of locally-provided emergency response systems.
- Monitor proposals or legislation affecting seniors and coordinate advocacy efforts as needed.
- Provide support the AAA contracted service provider network to ensure a sustainable and viable service delivery system of high quality, proven programs that support the greatest level of autonomy and independence for seniors.
- Conduct a Requests for Proposal process for the next funding cycle.
- Monitor new and emerging needs.
GOAL 1: VISIBLE LEADERSHIP. The AAA will provide visible leadership and effective advocacy to promote the needs of seniors and caregivers.

Rationale: The AAA is mandated to be a visible leader and advocate in the community on issues relating to seniors. The need to continue to educate elected officials and the public about the growth of the senior population, the needs of seniors in the PSA and advocacy for funding for senior programs continues to be a top priority.

NOTE: Objectives marked with a “PD” (Program Development) or “C” (Coordination) are funded in part by direct service Title IIIB funds. This is an allowable use of funds, but only for when the specific objectives are approved by the Department of Aging during Area Plan review.

Objectives

1.1 State leadership on senior issues. The AAA Executive Director will continue to work with former members of the State Master Plan on Aging Steering Committee to share opportunities for improving OAA and non-OAA services and service delivery as well as identify unique equitable opportunities for older Californians to thrive and age in place. Measurement: by participating in workgroups and policy work on issues such as Loneliness and Isolation and the Digital Divide, the Executive Director will work cooperatively towards local and statewide implementation. 7/1/21-6/30/22  C

1.2 Local leadership on senior issues. The AAA Executive Director will provide local leadership to educate and inform elected officials and the public about current and emerging issues affecting seniors, including, impacts of COVID-19 on seniors and the service delivery system and updated senior demographics for the PSA. Measurement: increased awareness about the needs of seniors in the PSA. 7/1/21-6/30/22

1.3 Age Friendly California. The AAA Executive Director will continue work at the State level on both the Master Plan on Aging’s Age Friendly workgroup to promote the State becoming Age Friendly. Measurement: participation in Master Plan on Aging Age Friendly workgroup. Status: Complete

1.4 Local Age Friendly Planning. The AAA Executive Director, and key staff, will engage in local efforts in the PSA to create an Age Friendly Santa Cruz County, providing local expertise and planning support as appropriate, with a goal of a coordinated planning effort. A similar effort will be explored for San Benito County and its two cities. The intended result is that representatives from cities and counties in the PSA will attend trainings, informational meetings and take action to consider joining Age Friendly/Livable Communities efforts. Measurement: number of trainings, informational meetings and jurisdictions taking action to commit to Age Friendly/Livable Communities Projects. 7/1/21-6/30/22  C

1.5 Local advocacy and engagement. The Seniors Council Advocacy Committee will develop a legislative platform, identify local advocacy priorities and through advocacy alerts and updates on the Seniors Council website, promote civic engagement. Measurement: approved legislative platform, increased web visits to Seniors Council advocacy page. 7/1/21-6/30/22
1.6 **Active participation on local commissions and committees.** The AAA Executive Director and key staff will actively participate on local committees and commissions including the Human Care Alliance, Santa Cruz County Seniors Commission, San Benito County Aging and Long Term Care Commission, Santa Cruz County RTC's Elderly and Disabled Transportation Advisory Committee, San Benito County Social Services Transportation Advisory Committee. Measurement: regular attendance and participation at these meetings. 7/1/21-6/30/22

1.7 **COVID Response and Transitioning of Services.** The AAA Executive Director will continue to lead local efforts, including regular meetings with State and local leaders and the Aging and Disability Service Provider Group to maintain a coordinated response and efficient use of funding for COVID-19 activities, and, as reopening begins, ensure that providers receive accurate and timely information to ensure a safe transition. The effort may include the development of new programs, partners and projects. Measurement: documentation of coordinated planning and response. 7/1/21-6/30/22
GOAL 2: ENSURE THE PROVISION OF HIGH QUALITY SERVICES THAT PROMOTE OPTIMAL WELL-BEING AND INDEPENDENCE. Provide resources and services that promote optimal well-being and are efficient, effective and delivered through a well-coordinated service network.

Rationale: A key function of the AAA is to oversee the contracting and service delivery process for program funding. During the contracting process, the AAA ensures that services are delivered by providers that meet all contract and regulatory requirements, and that services are delivered in an efficient and effective manner, in accordance with all mandates and applicable regulations.

Objectives:

2.1 Contracts and Allocations. AAA staff will ensure that AAA service delivery funds are allocated appropriately in accordance with the mandates and requirements of the AAA’s Area Plan Contract with the California Department of Aging and all applicable regulations. Due to the COVID pandemic, the AAA received approval from the Department of Aging to extend current contracts for an additional year. During 2021-22 the AAA will conduct an RFP for the 2022-26 Funding and Contract Cycle. Measurement: Successful completion and funding awards for the 2022-26 funding cycle. 7/1/21-6/30/22

2.2 Program Monitoring/Compliance. AAA program and fiscal staff will ensure that AAA-funded services are efficient, effective and high quality, and meet all contract and regulatory requirements. All service providers will receive ongoing fiscal and program desk monitoring, annual risk assessments and on-site monitoring every two years. Measurement: completion of ongoing service and fiscal performance monitor and site visits and technical support as needed. 7/1/21-6/30/22

2.3 Quality Services, Measurable Results. In accordance with the service unit plan outlined in this Area Plan, the AAA will ensure the effective provision of services of Title IIB Supportive Services, Title IIC Nutrition Programs, Title IID Health Promotion, Title IIIE Family Caregiver Support Program, Long Term Care Ombudsman, Title VIII Elder Abuse Prevention Program and Falls Prevention, as well as the Health Insurance Counseling and Advocacy Program and the Medicare Improvements for Patients and Providers Act (MIPPA) funding. Expected outcome is provision of services that meets program service delivery requirements and service targets contained in the Service Unit Plan and are delivered safely during COVID 19 restrictions and the transition to reopening. Measurement: Documentation of ongoing service performance. 7/1/21-6/30/22

2.4 Services Targeted to Those in Greatest Need. In accordance with the Older Americans Act, all AAA-funded service providers will be required by policy and contract language to target services to those in greatest economic and social need including low-income, ethnic minority seniors. Measurement: client data reporting 7/1/21-6/30/22
2.5 Ensure a coordinated service delivery network. The AAA Executive Director will convene monthly meetings of Aging and Disability Service Providers to ensure a high level of coordination and information sharing beyond the AAA-contracted network. Non-AAA contracted providers include the, the Central Coast Center for Independent Living, Health Projects Center/MSSP/Caregiver Resource Center, the Cabrillo College Stroke Center, Elderday Adult Day Health Care, Grey Bears Brown Bag Program and Village Santa Cruz. A particular area of focus during 2021-22 will be the sharing of state and local guidance and best practices for safe service delivery and transitions to reopening. Measurement: coordinated response and sharing of best practices for safe service delivery, innovative service models and procedures for reopening of services. 7/1/21-6/30/22

2.6 Coordinate with organizations beyond the traditional AAA network such as senior center directors, healthcare providers, Parks and Recreation Departments and others to encourage new partnerships and collaborations. Building on work begun in 2020-21, the AAA Executive Director and key staff will continue a partnership of health promotion webinars with Kaiser Permanente and the Santa Cruz Warriors and regular meetings with local senior center directors. Measurement: at least six meetings of senior center directors and local health providers, such as Kaiser and at least six webinars will be convened. 7/1/21-6/30/22
GOAL 3: ENSURE ACCESS TO INFORMATION, BENEFITS AND PROTECTION OF RIGHTS FOR COMMUNITY LIVING SENIORS, CAREGIVERS AND RESIDENTS OF FACILITIES

**Rationale:** Access to information about services is the foundation of the service delivery system. Seniors and their caregivers must have accurate information about available services and benefits in order to access services and ensure that the rights of seniors are protected.

**Objectives**

3.1 **Information & Assistance** Through the provision of Title IIIIB and Title IIIIE information and assistance services by AAA contracted providers in both counties, the public will have access to accurate, up-to-date information about senior programs and services. Services will be available by phone, through agency web pages and via agency-developed resource guides. 
Measurement: achievement of service unit targets, distribution of resource guides and maintenance of websites. 7/1/21-6/30/22

3.2 **ADRC San Benito County.** With a grant provided from the Department of Aging, the AAA Executive Director and Special Projects Coordinator, in collaboration with Jovenes de Antaño and the Central Coast Living Center, and the San Benito County Aging and Long Term Care Commission, will open and actively expand the operations of a “no wrong door” single point of entry San Benito County Aging and Disability Resource Center for seniors and persons with disabilities. Measurement: transition of San Benito County ADRC from emerging to full ADRC status. 7/1/21-6/30/22 PD

3.3 **Maintain and support key focal points for senior services.**

3.3.1 With progress largely stalled during 2020-21 due to the COVID pandemic, the AAA Executive Director will renew efforts to work with County Supervisors, senior service providers, state legislators and other partners to protect the status of Live Oak Senior Center, a community focal point housing key AAA services which is proposed to be converted to housing, and advocate to preserve this center for senior programs. Measurement: Maintenance of a key focal point for senior services in the Greater Santa Cruz Area 7/1/21-6/30/22 C

3.3.2 Building on work begun in 2020-21 the AAA Executive Director will actively participate in the newly formed City of Watsonville Senior Center/Community Program workgroup to address new (COVID 19), ongoing and emerging issues and services to support older adults living in the City of Watsonville and surrounding South Santa Cruz County areas. Measurement: improved coordination and continued strengthening of this key focal point for senior services and expanded opportunities for engagement for seniors. 7/1/21-6/30/22 C

3.4 **Legal Assistance.** Through a contract with Senior Citizens Legal Services, seniors in Santa Cruz and San Benito Counties will have access to free, high quality Legal Assistance for issues such as benefits eligibility, consumer and housing issues. Measurement: program monitoring and achievement of service unit targets 7/1/21-6/30/22
3.5 **Ombudsman.** Through a contract with Advocacy, Inc. the Long Term Care Ombudsman Program will provide facility-placed residents advocacy and rights protection, complaint investigation and resolution. It will also offer education, information and referrals to the community and facility staff as mandated by law. Focus during 2021-22 will be increasing safe access to residents for Ombudsman staff and volunteers and family members during COVID-19 transitions to reopening. Measurement: achievement of program benchmarks and successful initiatives during COVID-19 to increase access to residents. 7/1/21-6/30/22

3.6 **Elder Abuse Prevention.** Through a contract with Advocacy Inc., Title VII Elder Abuse Prevention activities will result in greater awareness about elder abuse, including identifying and preventing elder/dependent adult abuse. Services may include: public education sessions, trainings for professionals or caregivers and support to develop a coordinated system for elder abuse prevention. Measurement: achievement of benchmarks in service unit plan 7/1/21-6/30/22

3.7 **HICAP** Through a contract with Senior Network Services Health Insurance Counseling and Advocacy (HICAP) program, Medicare and Medicare-eligible seniors will receive accurate information about Medicare enrollment, benefits and supplemental insurance options. Funds provided by the Medicare Improvements for Patients and Providers Act (MIPPA) will support HICAP to do targeted outreach to Medicare beneficiaries about the Low Income Subsidies and the Medicare Savings Program. Measurement: achievement of established benchmarks 7/1/21-6/30/22

3.8 **Project SCOUT/Tax Assistance.** The AAA will, through use of direct service Title IIIIB funds, provide support to Project SCOUT to provide free tax assistance to seniors by IRS-trained volunteers, ensuring that seniors receive accurate tax preparation to the greatest extent possible with safe service modifications which actively engaging and coordinating with local partners such as local credit unions, United Way and Community Ventures. Expected outcome is completion of accurate tax returns, including any refunds, and assistance with late filing as needed and maximum program impact through local coordination of efforts. Measurement: number of returns completed, total dollar amount of refunds and number of late filings prepared. 7/1/21-6/30/22

3.9 **Senior Farmers Market Vouchers.** Providing that it is safe and allowable to do so and vouchers are made available, the AAA RD will oversee the distribution of Senior Farmers Market vouchers to qualifying seniors at senior market days in summer, 2022. Seniors will benefit from increased access to fresh fruits and vegetables. Measurement: distribution of vouchers qualifying seniors. 7/1/21-6/30/22

3.10 **LGBT Diversity Training.** As part of ongoing efforts to ensure equity and inclusion, the AAA will provide LGBT cultural competency training for contracted service providers and the aging and disability service provider network. Measurement: completion of training session 7/1/21-6/30/22
GOAL 4: AGE-FRIENDLY, LIVABLE COMMUNITIES. The AAA will promote the creation of, and coordinate the planning process for, Age-Friendly communities that support senior's ability to age in place and engage in their communities to the greatest degree possible.

Rationale: Providing programs and supports that empower seniors to remain as healthy, independent and engaged in their communities to the greatest extent possible is the core mission of Area Agencies on Aging. Age Friendly Communities provide a way to ensure that the needs of seniors are included in local planning processes. A recent survey by AARP found that ¾ of survey respondents expressed a desire to stay in their current residence as long as possible.

4.1 Reduce senior loneliness and isolation AAA staff, building on prior years work of the Seniors Council/AAA Loneliness and Isolation Workgroup, will continue to coordinate local efforts to reduce senior loneliness and isolation. During 2021-22, AAA Executive Director will work locally with AAA-funded providers and community partners including senior center program staff at Louden Nelson Center in Santa Cruz and Watsonville Senior Center, Village Santa Cruz, California Grey Bears Brown Bag Program, Health Projects Center, Santa Cruz Museum of Art and History, Elderday Adult Day Health Care, Santa Cruz Police Department’s You Are Not Alone Program and Kaiser Permanente, and with the Department of Aging and other AAA’s to develop programs and strategies to combat loneliness and isolation: Measurement: During 2021-22 the AAA will partner with agencies listed above to develop a plan to increase awareness and reduce senior loneliness, connecting with traditionally isolated populations, including those in rural settings, the LGBT community and ethnic populations in Santa Cruz and San Benito Counties. 7/1/21-6/30/22  C

4.2 Develop tools to help bridge the digital divide. Collaborate with the AAA-funded providers and the Loneliness and Isolation Workgroup, including community partners such as senior center program staff at Louden Nelson Center in Santa Cruz and Watsonville Senior Center, Village Santa Cruz, California Grey Bears Brown Bag Program, Health Projects Center, Santa Cruz Museum of Art and History, Elderday Adult Day Health Care, Santa Cruz Police Department’s You Are Not Alone Program and Kaiser Permanente to bridge the digital divide and increase opportunities for connection, training and engagement. Develop a coordinated technology plan and assessment tool(s) to assess older adults for social isolation. A grant received from the Santa Cruz Community Foundation will support this effort. Measurement: development of increased access to technology and number of older adults provided with equipment, training and connectivity. 7/1/21-6/30/22  C
4.3 Expand options for minor home repairs and yardwork. Home and yard maintenance ranked as the #1 need in the AAA senior survey. The COVID pandemic halted the delivery of minor home repair services during much of 2020-21 due to both COVID restrictions and heavy reliance on senior volunteers. During 2021-22, the AAA will support efforts to strengthen the program through volunteer recruitment and promotion of the service as reopening gets underway. AAA staff will also promote the importance of assistance with minor home maintenance and yard work and modifications such as installation of grab bars and hand rails as an important and highly cost-effective methods to support senior’s ability to remain safely independent in their homes. Services will be coordinated with local Falls Prevention program efforts. Measurement: number of seniors served and number of minor home modifications during 2021-22. 7/1/21-6/30/22

4.4 Improve awareness and access to resources about Falls Prevention. Building on work done in 2021-22, through a grant from the California Department of Aging, the AAA Special Projects Director will continue the development of a falls prevention program. Components of the program will include an expanded awareness campaign, in home assessments completed safely and as reopening allows, grant funds to purchase equipment for modifications such as installation of grab bars and hand rails and coordination with the Seniors Council in-house emergency response devices program, Companion for Life. Measurement: successful completion of CDA Falls Prevention grant objectives. 7/1/21-6/30/22

4.5 Provide Health Promotion Programs: Through the use of Title IIIID Health Promotion funds, the AAA will support the provision of evidence-based classes, with a focus programs that reduce the risk of falls and improve health and well being. Classes will be available both virtually and in-person when safe to do so. During 2021-22 focus will be on increasing trained volunteers for both virtual and in-person service delivery. Programs planned to be offered include Matter of Balance, Tai Chi for Arthritis and Active Choices. Measurement: number of volunteers trained and sessions provided with Title IIIID funding. 7/1/21-6/30/22

4.6 Promote and Expand Opportunities for Senior Volunteerism and Engagement. The AAA Executive Director, in partnership with the Volunteer Center, will promote civic engagement and volunteerism by seniors and encourage its contracted service providers and the Aging and Disability Provider Network to offer meaningful opportunities for seniors to participate in, and contribute to program operations. AAA funding will support a number of programs that utilize trained senior volunteers to provide services including: tax preparation, Ombudsman services, minor home modifications, assistance at senior dining centers, delivery of home-delivered meals, and HICAP counseling. The agency will seek funding to develop coordinated efforts to enhance volunteer recruitment and other opportunities in San Benito County. Expanded opportunities will be created through projects related to reducing senior loneliness and isolation. Measurement: increased opportunities for senior volunteerism and engagement. 7/1/21-6/30/22

4.7 Promote the need for improved access to affordable, reliable in-home help. Help with housework was identified as the #2 need, paying for help in the home #5 and finding reliable help #6. AAA staff will use the needs assessment survey results to promote the growing need for reliable, affordable in-home help. The COVID pandemic delayed progress on this objective, efforts will be renewed in 2022. Measurement: Expansion of opportunities for seniors to access affordable, reliable in-home help. 7/1/21-6/30/22
4.8 Local Disaster Preparedness. During 2020-21, the AAA played a key role in COVID-19 response, coordinating communication, information sharing and best practices for safe service delivery and innovative service models at monthly Aging and Disability Service Provider Meetings. The AAA Executive Director attended key meetings with County Health staff in both counties as needed, such as the development of local Great Plates Delivered Programs. The Aging and Disability Service Provider meetings also provided a key forum for sharing information and resources during the Santa Cruz County fires of Fall, 2020. In addition to ongoing COVID response and reopening efforts, AAA staff will also continue to support efforts for coordinated disaster preparedness efforts for fire, flood and earthquakes and planned power shut-offs and advocate for disaster planning to be included as a domain in all Age Friendly planning. Measurement: Participation in local efforts and successful inclusion of disaster preparedness in Age Friendly planning.
7/1/21-6/30/22
2021-22 CONTRACTED SERVICE PROVIDERS

SERVING SANTA CRUZ COUNTY ONLY

Community Bridges
  Meals at Senior Dining Sites
  Transportation to Meal Sites

Senior Network Services
  Information and Assistance
  Case Management
  Visiting/In-Home Assessment
  Family Caregiver Support Program

Family Service Agency
  Peer Counseling and Friendly Visiting
  Independent Living Skills Training

Volunteer Center
  Helping Hands Home Repair Program

SERVING SAN BENITO COUNTY ONLY

Jovenes de Antaño
  Information and Assistance
  Home-delivered Meals
  Meals at Senior Dining Sites

Family Caregiver Support Program
  Case Management
  Transportation to Senior Dining Sites

SERVING BOTH SANTA CRUZ AND SAN BENITO COUNTIES

Advocacy, Inc.
  Ombudsman & Elder Abuse Prevention

Senior Network Services
  Health Insurance Counseling and
  Advocacy Program (HICAP)

Senior Citizens Legal Services
  Legal Assistance

Vista Center for the Blind
  and Visually Impaired
  "Comprehensive Assessment"

AREA AGENCY ON AGING DIRECT SERVICES

Project SCOUT Tax Assistance (Santa Cruz County only)
Health Promotion Activities- Tai Chi for Arthritis, Matter of Balance
Outreach/Senior Farmer’s Market Voucher Distribution
Program Development & Coordination Activities
  *note: AAA Direct Services utilize less than 3% of available service funding
Date: 4-9-21

To: Area Agency on Aging Advisory Council
   Seniors Council Board of Directors

From: Clay Kempf, Executive Director

RE: Executive Director’s April Report

COVID-19
COVID-19 continues to be at the forefront of all programs serving seniors, including our own agency. We operate remotely for most of our activities as much as possible, with the office only being open for staff and deliveries.

As vaccinations become more widespread, we’re having internal and external discussions about a number of topics, including re-opening processes for in-person services for ourselves and our contracted service providers; establishment of a vaccine policy for our staff & volunteers; and how we address our space shortage as we reopen.

Re-opening Discussions involve not only ourselves and our contracted service providers, but also our local senior centers. Preliminary discussions with California Department of Aging has directed all AAA’s to follow the guidance of local County Public Health Departments. Director McCoy-Wade and her staff are assisting in encouraging County Public Health Departments to engage with AAA’s in developing senior-specific guidelines. California Association of Area Agencies on Aging (C4A) and Meals on Wheels of California (MOWCa) are also working on this challenging topic. Our next meeting of Santa Cruz County Aging & Disability Service Providers will feature a discussion on our next steps.

Seniors Council staff have drafted an Employee Vaccination Policy for Board consideration. As this is a personnel matter, it will require Board Approval. Our intent is to develop a separate policy for our program volunteers, and we anticipate bringing that back to the Board in May or June. Until then, the Employee Policy will be the default guideline for our volunteers as well. See the attached document for discussion and action.
Office space has been an issue for over a year, as the Board knows, and we delayed our pursuit of additional space when the pandemic moved our staff into working remotely at least part of the time. But as we ready for re-opening the issue has, of course, resurfaced. We have a likely solution in the works which we’ll share with both the Board & AAA Advisory Council during our meetings.

BUDGET OUTLOOK
Local funding discussions are about to get underway, for better or for worse. San Benito County and the City of Hollister continue to be the most progressive of our jurisdictions in their recommendation of the AAA’s role of a quasi-government organization and fund us as part of their regular budget. Discussions with Santa Cruz County staff continue regarding this option, with very little progress made to date.

Details of our other local jurisdictions include the following:
- County of Santa Cruz – extend CORE Contracts another year
- City of Santa Cruz – probably extend CORE Contracts another year
- City of Scotts Valley – continue moratorium on Community Program Funding
- City of Capitola – reconsidering Community Program Funding for 2021-22; reinstating some funding for 2020-21 with April Awards
- City of Watsonville – considering opening up applications for 2021-22 & 2022-23

Perhaps more relevant to our discussion involves the American Recovery Plan Act, or ARPA. We’re not sure of the funds we’ll be receiving, but a rough estimate puts the number around $800,000. We’re not sure when these funds will become available, or if the timeline will be for one year or two. California Department of Aging is awaiting formal notice of award from the Administration of Community Living (ACL), along with guidance relating to expenditures, timeline, etc.

Our local cities and counties are also receiving ARPA funding, and we’re hoping that we can match our funds and projects with some efforts by local government.

State Funding increases continue to be considered in Sacramento, and will be discussed under the Advocacy Committee Report. Also included under the Advocacy Committee is our list of legislative positions on various state bills.

AGE-FRIENDLY COMMUNITIES No update. As reported last month, the effort remains on hold (due to COVID 19) with no action taking place since the County of Santa Cruz took over the project a year ago.

The AAA Advisory Council and the Seniors Council Board of Directors recommendation to move forward with the Advisory Council serving as the County-wide Age-Friendly
Advisory Committee has been discussed with County staff but no action has taken place. The Board’s offer to provide independent analysis of the implementation of the Age Friendly plans has also been mentioned in meetings with County staff.

MONTHLY WEBINARS
We continue to partner with Kaiser Permanente and the Santa Cruz Warriors to host local webinars featuring health-related topics. This week the event was “Food for Thought: Nourishing the Mind, Body & Spirit While at Home”, and was very well received. Our Registered Dietician Caren Dix did a fantastic job of cooking on camera while discussing healthy eating and socialization.

MASTER PLAN FOR AGING
Your packets include invitations to our Wednesday, May 19th AAA Advisory Council meeting as our local launch of Master Plan for Aging (MPA) activities. Please share the invitation with other City Council members and County Supervisors, staff, and anyone you feel might be interested in participating. Also included is a working draft of the agenda for the day. We have a more detailed draft agenda that includes a number of local projects for the Five MPA Goals that are already underway.

May is Older Americans Month, and this year’s theme “Communities of Strength” fits perfectly with kicking off the development of a MPA local playbook. Our federal partners put special emphasis on the power of connection and engagement in building strong communities as part of the celebration.

Members of the former Master Plan for Aging Stakeholder Advisory Committee continue to meet on a regular basis to promote the adoption of Master Plan for Aging recommendation on local and statewide levels, including several subcommittees. I’m actively participating on with the main group and the Legislative Committee

TRANSITIONS
Several transitions and passings of note have occurred in the past 30 days, and deserve mention, with more on the horizon. These include the pending retirement of Derrell Kelch, Executive Director of the California Association of Area Agencies on Aging, who has been a wonderful friend and political mentor of immeasurable value to me and to our organization; and the departure of Allison Yant from the Monterey County Area Agency on Aging. Best wishes to both. Derrell has always been willing to take the lead in dealing with controversial and
potentially polarizing issues on behalf of individual AAA's, making us all stronger and more secure in the process.

Sadly, Steven Wallace, Ph.D. at the UCLA School of Public Health, and Dennis Dudley both passed away in recent weeks. Steve was a world renown leader in Senior Health Policy, and Dennis was a former AAA Planner and Director that went out of his way to make both Patty and me feel welcomed and valued when we first joined the California AAA network. Dennis left his AAA Director position to work with the Federal Administration for Community Living. He remained a warm and friendly face to all of his past colleagues at state & national events, and we always remained in contact. Life and work were always more fun when Dennis was with us.
**DRAFT  Proposed Agency Policy**

**PANDEMIC VACCINATION POLICY:**

Coronavirus (COVID-19) is officially classified as a pandemic and is affecting lives and work around the globe. The purpose of this policy is to prevent the spread of Covid-19 in our workplace and the communities we serve.

Because Seniors Council has a responsibility to provide and maintain a workplace that is free of known hazards, all employees working for Seniors Council of Santa Cruz and San Benito Counties are required to present proof of Covid-19 vaccination before returning to the workplace or interacting with those we serve.

An exemption to the vaccination policy based on an ADA (Americans with Disabilities Act) disability may be requested for certain medical reasons, as defined by the most current recommendations of the CDC’s Advisory Committee on Immunization Practices (ACIP). Under the Title VII of the Civil Rights Act of 1964, an employee whose religion prohibits vaccinations may also apply for an exemption.

Receiving an exemption means the Seniors Council will make reasonable accommodations for the exempt employee. For the safety of all involved parties, including those we serve, a reasonable accommodation will not necessarily provide for full contact with other staff, volunteers, and/or service recipients.

We will continue to emphasize best Public Health practices to prevent further spread of COVID-19 in the workplace, including maintaining physical distancing, frequently washing hands, and wearing face coverings.

Unless otherwise amended this policy applies to all Seniors Council program staff & volunteers.

The policy will also apply to future CDC declared pandemic events.

**Effective Date: 5/15/21**

Adopted 4/15/21
Launching California’s Master Plan for Aging

Developing a Local Playbook for
Santa Cruz & San Benito Counties

Hosted by the Area Agency on Aging Advisory Council

10 am  Welcome & Introduction of the AAA Advisory Council

10:10  Review of our Agenda, format, how to ask questions, etc.

PART ONE – What is the Master Plan on Aging?

10:15  California Department of Aging - Overview of the Master Plan for Aging
   1. Concept
   2. Stakeholder Advisory Committee
   3. Public Input
   4. Draft Recommendations to Governor Newsom’s Office
   5. Governor’s Cabinet - Final Report

10:45  Q & A

11:00  PART TWO – Developing our Local Playbook & Action Plan
   Possible Local Projects within the Five MPA Goals

MPfA GOAL 1: HOUSING for All Ages
MPfA GOAL 2: HEALTH REIMAGINED
MPfA GOAL 3: INCLUSION & Equity
MPfA GOAL 4: CAREGIVING that Works
MPfA GOAL 5: AFFORDING Aging

11:15  Ideas, Comments & Local Experts Reaction Panel
   Elected Officials from the AAA Advisory Council, County Staff; CRC John Beleutz, CCCIL, Kaiser, Alliance for Health, Hazel Hawkins?

11:45  Next Steps: Turning Today’s Launch into Action
CALIFORNIA'S
MASTER PLAN FOR AGING

SANTA CRUZ & SAN BENITO COUNTIES
LAUNCH EVENT

IDEAS, PERSPECTIVES, AND STRATEGIES ON CREATING
COMMUNITIES FOR ALL AGES & ABILITIES

PLEASE REGISTER AT . . .

MPA Local
Launch Event
Registration Link

AND JOIN VIA ZOOM • MAY 19, 2021 • 10AM

Hosted by
Seniors Council and the Area Agency on Aging Advisory Council
ADRC of San Benito County  
Staff Report – March 2021

Staff continues work on various aspects of the telephony upgrade at three locations. The Aptos office work is wrapping up, save a few call messaging and routing issues that are being resolved. Project SCOUT’s site at the Watsonville Senior Center is nearing completion with more out-going call lines, and a pending improvement/solution to the overwhelmed messaging system currently in-place. The final step will be to configure the voicemail-to-e-mail notifications per staff/volunteer, and then port the new lines to the new carrier. All of this has taken longer and been a little more complicated than we would have liked, but we are increasingly pleased with the new functionality, and the projected future cost savings. The work at Jovenes de Antaño will begin in earnest in coming weeks, with the goal of having a new system there operational by mid-May.

Staff was disappointed that a possible hire for the open ADRC Site Coordinator position, to be located in Hollister, ended up backing out after initially accepting the offer of employment. After some discussion, we are moving forward with re-opening the search process over the next couple of weeks, and hope to have a pool of candidates to interview by late April. A copy of the position description is available from staff upon request, and we’d appreciate it being shared with any qualified candidates you might know.

Staff attended a number of virtual informational and training events including: CA Long Term Care Insurance Task Force Meeting; Administration for Community Living; CDA Assistive Technology II – Peer Action Learning Group; COVID-19 Check-In Webinar; San Benito County Aging and Long Term Care Commission; CFILC’s Digital Access Project Webinar; State ADRC Advisory Committee Meeting; CDA ADRC Fridays: Talk, Learn, Connect.

Staff participated in a check-in call with ADRC Branch Team staff regarding projected program grant funds expenditures relative to the June 30, 2021 sunset date for FY19/20 funds. Staff provided assurances of full expenditure of funds and a formal notice of minor - - did not meet the 25% cost category changes threshold to warrant a formal request - - budget amendments to CDA prior to the April 4, 2021 deadline for such as established by CDA. Once approved, a copy of the amended budget can be made available to Advisory Council and Board Member upon request.

Staff and ADRC LTSS Options Counseling Certificate Program participants continue to actively work on their certification program curriculum. Six individuals, to date, have completed the course work. Others are at various stages of completion.

Staff is pursuing a vendor agreement with Iversen Designs to complete a website redesign and upgrade for www.seniorscouncil.org, and a new-from-scratch website for the ADRC - - both sites are will be redesigned to foster greater access through accessibility and alt features for people who use e-reader technology, are visually impaired and require larger text, or even require basic site translation into another primary language. A developing ADRC Countywide Aging and Disabilities Resources Directory will be provided. The directory will be searchable and printable so as to provide 24/7 access to resources information for older adults, individuals living with disability, and caregivers. Both sites will employ simple navigation tools, plain language, and more recognizable iconography. The upgrade also provides an opportunity to add new content, include an event/meeting calendar, reorganize some aspects of Seniors Council’s site.

ADRC Partnership outreach efforts continue: County Veterans Services; County HHSA; and HPC/DMCRC.
PROJECT SCOUT
APRIL 2021 Report

Project SCOUT’s Online and Drop off Service 2021

Project SCOUT continues providing county-wide online, as well as pre-assigned drop-off tax assistance, by appointment. We are taking most clients online, but some at our drop off sites as they are opening up to more clients, and more volunteers are willing to service them as they have gotten their COVID vaccinations.

Our current drop-off sites serving clients (all by appointment):

NORTH COUNTY:

- Highlands Park Senior Center
- Mountain Resource Center (Felton)
- Scotts Valley Senior Center
- Davenport Resource Center
- Santa Cruz Community Credit Union Branch, downtown Santa Cruz

MID COUNTY:

- Live Oak Resource Center
- Senior’s Council Aptos Office

SOUTH COUNTY:

- Santa Cruz Community Credit Union, Watsonville Branch
- La Manzana Resource Center
- Immigration Project
- Watsonville Senior Center, Project SCOUT’s Office
Totals as of March 31st, 2021:

**SCC TCE program**

- Number of Federal returns prepared – 330
- Dollar Amount of Total refunds – $203,566.00
- Dollar Amount of Federal EITC Claimed – $16,411.00
- Requesting Direct Deposit – 126
- Primary or Secondary 60+ - 251

**SCC VITA program**

- Number of Federal returns prepared – 219
- Dollar Amount of Total refunds – $197,599.00
- Dollar Amount of Federal EITC Claimed – $61,449.00
- Requesting Direct Deposit – 74
- Primary or Secondary 60+ - 11
What is working:

- Committed crew of volunteers supporting the Program:
  - Currently stands at 19
  - 4 Phone volunteers calling clients from home or Watsonville office; All clients have received a call/email if they contacted us before the March 15th cutoff date for services.
  - 15 volunteers providing tax prep and phone support.
- Community Partners allowing us to provide more assistance as we finish tax season:
  - Aside from the mentioned above, we also have drop off sites for seniors at their living facilities in:
    - Brookdale Lodge (Scotts Valley)
    - La Posada (E. Santa Cruz)
    - Paloma del Mar (Freedom)
- Online tax support:
  - Clients can get their taxes completed fully online and have done about 40% of our total this way.
  - It is a much faster, easier, and convenient approach for those who are able to do taxes this way.

Challenges:

- Late start to tax season (February 12th), started us off with a massive backlog.
- Some of our seasoned volunteers decided to sit this season out, leaving us with both a smaller and newer crew who needs more support.
- Volunteers hesitant to volunteer at drop-off sites, limiting the amount of people that can be serviced.
- Although new phone system partially working, and now can make up to six calls out while getting calls in, which has allowed to get caught up with calls, the amount of calls/emails still received take lots of time which means that both program manager and volunteers have to limit time dealing with new inquiries so we can attend to those already being serviced. Also, voicemail system is still running from old system, which changes voicemail message on its own, and after 40 minutes plus of voicemails will not take any other. We are constantly running into the issue of clients not being able to leave a message for this reason.
- Online approach is "scary" to some volunteers who are not "techie" enough to be able to respond to clients quickly. This limits the amount of clients we can service and respond to.
- Hiring seasonal, part time staff is complicated; we are in the process of certifying Ms. Beatriz Perez, a highly capable and bright senior retiree, who will be working both from home and office when trained and certified, we hope by the end of the week.
Follow up:

- Awaiting the full transferring to the new phone system.
- Getting clients who contacted us by 3/15 fully processed, both online and via phone.

Story of the month:

Woman migrant came to us, was charged over $150.00 for tax prep services in Watsonville for an improperly done return in which her husband, who does not yet have an ITIN, was not included (filed as single, less work for the tax preparer, and done illegally!), and where she owed over $2000 to the IRS. Not only did she pay this amount, but also late fees since the client was left out in the cold trying to navigate with the IRS how to do a payment plan.

Project SCOUT has been able to assist said client and her husband by:

- Creating an ITIN application for the client’s husband, they will finish the process at the local IRS office.
- Re-creating the tax return for the client with the proper filling.
- Now the client will be saving around $1,000, which will be returned to them by the IRS.