SENIORS COUNCIL BOARD OF DIRECTORS

Thursday, April 21, 2022

10 a.m. – 12 Noon

📅 ZOOM VIRTUAL MEETING

Clay Kempf is inviting you to a scheduled Zoom meeting.

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Meeting ID: 810 5565 9360

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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 2022 Board Meeting
10:10  6. Committee Reports
       1. Finance Committee
       2. Nominating & Board Development
       3. Advocacy Committee
       4. Executive Committee
          a. Proposed Personnel Policy Change
          b. Other Exec. Discussions

10:40  7. 2022-25 RFP – Final Action

10:50  8. 2022-23 Area Plan Update

11:10  9. Executive Director’s Report
       1. COVID-19 Update
       2. ARPA, OARR, & Nutrition Infrastructure Funding
       3. Developing & Delivering the Master Plan for Aging in PSA-13
       4. Other Agency Activities

11:40  10. 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  11. Miscellaneous Correspondence & Other Items

12 Noon  12. Adjourn

Next Meeting:

Board of Directors: Thursday, May 19, 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, please provide them to Seniors Council staff prior to the meeting. 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 17, 2022
*Held by Zoom Conference Call in accordance with COVID-19 distancing requirements*

MINUTES

BOARD MEMBERS PRESENT: Pam Arnsberger, Tami Aviles, Barbara Canfield, Darrell Johnson, Barbara Kaiser, Wendy King, Mickie Luna, Steven Matzie, Jane Schwickerath, Mark Trabing, Gwen Yeo

ABSENT: Cathy Cress, Wayne Norton, Creighton Mendivil, Antonio Rivas

STAFF PRESENT: Clay Kemp, Executive Director; Patty Talbott, AAA; Hilary Minugh, Fiscal Specialist; Cathy Colvard, Fiscal Officer; Britt Bassoni, Special Projects; Tanya Wildbill, Foster Grandparent/Senior Companion Program Director; Maureen Hebert, Fiscal Assistant; Leanne Oliveira, San Benito County ADRC

OTHERS PRESENT: Krystal Weaver, CPA, Walters and Kondrasheff; Alma Molina, Community Bridges/Meals on Wheels; Lisa Berkowitz, Community Bridges/Meals on Wheels; Suzanne Stone, Advocacy, Inc.; Tim Bratton, Grey Bears; Ray Cancino, Community Bridges

1. Welcome, Call to Order and Introductions

Board Vice-President Pam Arnsberger called the meeting to order at 10:04 AM. Those present introduced themselves. Clay introduced and welcomed Tanya Wildbill, Program Director for Foster Grandparent and Senior Companion Programs.

2. Additions and Deletions to the Agenda

None.

3. Receive Announcements from Board Members

None.

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

None.

5. Consent Agenda

Board members were referred to minutes of the February 17, 2022 meeting. MOTION, Yeo/Luna, to approve the minutes of the February 17, 2022 meeting as submitted. PASSED unanimously.

6. 2020-21 Independent Financial Audit

Krystal Weaver, CPA, Walters and Kondrasheff, presented the agency's 2021 Audit.
Seniors Council Board of Directors March 17, 2022

Krystal reviewed the various components of the fiscal audit. Krystal said the agency’s funding is very complex. A lot of new funds this year. The audit is a clean audit, with no findings.

**MOTION**, Kaiser/Luna, to accept the 2021 Independent Financial Audit as presented. **PASSED** unanimously.

Gwen thanked Cathy, Hilary and Maureen. Great to have a clean audit. Mickie thanked Krystal for the audit and presentation. Krystal said there has been a lot of growth and staff it doing a great job, but would be good to consider adding staff. Cathy thanked Krystal and said she did a great job during a challenging year to audit. Clay thanked fiscal staff, who work as a great team. Clay and Board Treasurer will then sign letter to finalize.

7. **Area Agency on Aging Requests for Proposals**

Clay reviewed all the funding streams for contracted service providers and the process used to allocate funding by funding stream and service category for going out bid. If there are uncontested service categories, the AAA may contract as sole source with qualified applicants and enter into contract negotiations. Some services require to serve two counties — legal services, ombudsman and HICAP. The AAA may only contract for one year at a time, which can be renewed annually pending funding availability and satisfactory compliance. Typically contract cycle is 4 years, CDA granted one year extensions, so will be on a 3-year cycle this time to bring cycle back in alignment.

Clay said only two categories that went out to bid are competitive: senior nutrition program and meal site transportation. Clay referred to page 7-1 in packet. Grey Bears and Community Bridges both submitted proposals for the senior nutrition program, but Grey Bears did not apply for meal site transportation. The RFP panel recommends the award of the meal site transportation contract to Community Bridges/Lift Line as sole applicant.

**MOTION**, Yeo/Kaiser, to direct staff to enter into contract negotiations with Community Bridges/Lift Line for meal site transportation. **PASSED**

**Abstaining** Matzie

Clay reviewed the process and panel composition. Review panel consisted of two staff; three Board members and two AAA Advisory Council members and a community member. Great panel, great applicants, panel very engaged. Panel recommendation was to recommend Community Bridges/Meals on Wheels as provider for the senior nutrition program. Panel expressed their appreciation for both providers for their decades of service. Recommendation is also that the two agencies look for ways to collaborate and also to continue to monitor the Live Oak Senior Center situation if that center is lost as a central kitchen and meal site. AAA Advisory Council and Seniors Council Board review this month and make preliminary recommendation, final recommendation next month. If any appeals, will be considered next month.

Tim Bratton said Grey Bears board approached the proposal as an innovative solution to an emerging need in the aging community. He said he is disappointed at
the outcome, but accepts the results and isn’t planning to appeal. He shared his opinions on some of the process that he believes could be improved. He said the process felt rushed. 3 weeks to put together a very detailed proposal, need more time for something of this nature. Very close to presentation day, there was an irregularity on the review panel, and question about recusing, which ended up happening. Also the program director for the incumbent program is a member of the Advisory Council, may want to rethink that. Environmental impact, carbon footprint and whether food is locally sourced are also good to consider for future proposals. Tim expressed that he felt transparency and impartiality maybe wasn’t quite what he hoped.

Mickie asked if Tim if he was going to put his comments in writing to the Board, or he just wanted to express it at the meeting Accountability is important. Gwen and Steven agreed. Clay said after the preliminary decision is made, an applicant can submit a formal written appeal, is this interpreted as appeal or is the Board just requesting the feedback be put it in writing? Mickie said she is not talking about appeal, just documenting concerns. Pam said it needs to be very clear whether this is a formal appeal or just making comments. The form for appeal is available. Clay agreed and reiterated there needs to be clarity about this. There is a form for formal appeal and it is important that it is clear and obvious. Tim said he is just sharing his feedback and observations. Will ask his Board if they want to pursue formally.

Lisa said she is a member of the AAA Advisory Council, and it is the composition of Advisory Council to have a service provider representative. Clay confirmed this is a designated seat on the AAA Advisory Council. Lisa abstains from votes on any potential conflict. All AAA RFP process and development has been discussed and reviewed by AAA Advisory Council and Seniors Council Board of Directors, and discussed at Aging and Disability Service provider meetings. Tim said he disagrees that there could be impression of bias by having a contracted service provider on the AAA Advisory Council.

Ray Cancino thanked the staff and panel for their time and commitment to providing the best meals and service to our seniors and said he disagrees with the strategy of removing a provider representative from the Advisory Council and thanked everyone for their thoroughness and fairness in this process.

Clay said that at yesterday's meeting, the AAA Advisory Council voted to certify the process to date and recommended that Board accept the panel's recommendation, while encouraging discussion of collaboration and locally sourced food, but the review panel's recommendation was supported as submitted. Pam thanked Tim for his feedback. Wendy asked if locally sourced food was part of RFP or just Grey Bears proposal. Clay said locally source food was not a specific requirement or item in the proposal.

**MOTION**, Johnson/Kaiser to approve the preliminary recommendation to contract with Community Bridges as the senior nutrition program provider, as described in the RFP, the submitted proposal, and per state and federal regulations.  
**Roll call:** AYE: Luna, Kaiser, Trabing, Yeo, Johnson, King, Aviles, Canfield, Arnsberger. **NO:** none. **PASSED** ABSTAINING: Matzie  

-5-3
8. **Committee Reports**

8.1 **Finance Committee** – Barbara Kaiser said the committee met, agency-wide financials included in packet. Most programs looking good, some cash flow issues related to timing. Clay said that while there are timing issues in receiving payments, there are reserves cover it and there hasn’t been an issue with cash flow.

8.2 **Nominating Committee** – Pam reported there are two openings on the board starting in the new year. Sad to say goodbye to Darrell Johnson and Wendy King who will be stepping down. Both have served for many years and contributed so much. Mickie thanked Wendy so much for all she did, especially for farm workers, Darrell we will miss you. Lisa thanked Darrell and Wendy, have served on many committees with both of you, thank you for all you’ve done for so many years. Clay said both have brought so much integrity and care for those we serve and the organization. Wendy started years ago as an intern with disaster kit project. Darrell brought so much to the organization, can’t express thanks enough.

Pam has sent out applications to 3 suggested applicants from San Benito County. Would like nominations in April to have a slate in May. Evaluation year for Executive Director, board and staff participate and will receive. Will be done by mail. Encourage comments about specifics. Director’s evaluation is every other year.

8.3 **Advocacy Committee** – Wendy talked about messaging in meeting with electeds, moving from elevating the conversation to elevating investment in senior programs. Talking points for meeting with electeds. Meet with mayors. State legislative efforts, moving Master Plan for Aging into action. Clay forwarded talking points in the chat. Wendy covered what is in it. Clay we have elevated the conversation, time to invest in senior programs. 1. Embrace the creation of local playbooks. 2. Get support for State budget augmentations proposed 3. Challenge ableism and ageism as equity issues. Clay shared signup sheets for visiting electeds.

8.4 **Executive Committee** – no additional report

9. **Executive Director’s Report**

COVID remains a challenge, trying to get back to normal, but still operating with a lot of caution as variant emerging in Europe. Community Bridges has reopened their meal sites for second time after shutting down. Jovenes de Antaño has not reopened their dining site, in part due to pending kitchen remodel. Staying active in variety of state and local committees and workgroups. MPA workgroup, which Clay was a member of, officially disbanded, but has continued to meet on their own to keep the work going, including a legislative committee. Budget ask in packet is on the list, hearing on proposal in packet is next week at Assembly Budget Subcommittee on HHS, Wed 23rd. $40M infrastructure grants, purpose is to make sure that there are resources to prepare and deliver meals. Our PSA will receive about $600K, but CDA guidelines have many requirements that will make it challenging to implement, including requirement to develop of a plan to spend it by June 30th. Lisa said the reality of trying to get bids from vendors will definitely make this challenging. Mickie asked if Clay has seen a work order for the Jovenes kitchen. Clay said he has not, Mickie wondering what is the delay, the building belongs to City of Hollister.
10. **Miscellaneous Correspondence**

10.1 **ADRC/No Wrong Door San Benito County** – report in packet. Britt reported that focus is on expanding the pool of providers and developing the referral network. Appreciate any connections in San Benito County to introduce the ADRC and share information such as the website and Senior Resource Directory.

10.2 **Falls Prevention** – report in packet

10.3 **Foster Grandparent/Senior Companion Program** – report in packet

10.4 **Area Agency on Aging** – report in packet. Patty announced that the filing deadline for California Senior Legislature seats is March 31st. So far only one application received, Mickie Luna is running again and has applied for Senior Senator seat. If you know of any senior advocates who would be good for this opportunity, please refer them to Patty.

10.5 **Project SCOUT** – report in packet

11. **Adjournment**

Meeting adjourned at 11:57am

Next meeting: April 21, 10am-noon

Minutes prepared by: Patty Talbott
March 30, 2022

The Honorable Phil Ting
Chair, Assembly Budget Committee
1021 O Street, Room 8230
Sacramento, CA 95814

The Honorable Dr. Joaquin Arambula
Chair, Assembly Budget Subcommittee No 1
1021 O Street, 6240
Sacramento, CA 95814

Re: 2022-23 Budget Request: California Area Agencies on Aging (C4A)
$142 million one-time GF, plus $70 million annual ongoing

Dear Chairs Ting and Arambula:

As Chair of the Aging and Long-Term Care Committee, I strongly support a one-time, General Fund allocation of $142 million and $70 million annual ongoing to allow for C4A to modernize and reflect the current service needs to a multitude of programs provides by Area Agencies on Aging (AAA). Specifically,

- Expand the current funding for nutrition services by an annual allocation of $70 million. AAAs need additional on-going funding to reflect at a minimum. COVID-era expansion and funding levels that support the critical work of AAAs providing nutrition services to older adults and people with disabilities
- Modernize the funding for the Community Based Support Program with a one-time GF allocation of $90 million to be spent over a three year period.
- Establish a two-year pilot program to develop a Family and Caregiver Support Program through Aging and Disability Resource Centers with a one-time allocation of $3.451 million. Matching funds will be available to give additional support to this program.
- Fully support aging in place by a one-time allocation of $33 million for Title IIIB supportive services.
- A one-time $13.1 million investment to recruit and coordinate senior volunteers.

Thank you for your significant consideration. For any further information or assistance, please contact Liz Fuller at Elizabeth.Fuller@asm.ca.gov.

Sincerely,

ADRIN NAZARIAN
MEMBER, 46TH ASSEMBLY DISTRICT

AN:ehf
Date: 4/14/22

To: Seniors Council Board of Directors

From: Clay Kempf

RE: Proposed Personnel Policy Change — Starting Salary Flexibility

Background
Our current personnel policies acknowledge the need to bring in new employees at rates higher than the entry level. However, the Executive Director is limited to offering only a one-step, or 5% increase above entry wages. All over entry steps require advance approval by the Board of Directors. The current policy is as follows:

1. **Entering Salary**

   In cases of unusual recruitment difficulty or unusual and exceptional qualifications, the entering salary for an employee may be set by the Executive Director at any Step within the Range fixed for the position. An entering salary at or above Step III of the Range must be approved in advance by the Board of Directors.

Recommendation
Consider changing the existing policy to allow the Executive Director the authority to offer an entering salary up to 15% above the entry level. The new language would be:

1. **Entering Salary**

   In cases of unusual recruitment difficulty or unusual and exceptional qualifications, the entering salary for an employee may be set by the Executive Director at any Step within the Range fixed for the position. An entering salary at or above Step V of the Range must be approved in advance by the Board of Directors.
Date: 4/15/22

To: Seniors Council Board of Directors

From: Clay Kempf

RE: 2022-25 AAA Baseline Services RFP

Background
March’s Board (and AAA Advisory Council) meetings included discussion and preliminary action on our final RFP task – selecting a senior nutrition service provider for Santa Cruz County. All of our other funding categories were previously acted upon. Our timeline (included in packet) includes providing applicants the opportunity to appeal these decisions.

Our Proposal Review Panel recommended we award our Santa Cruz County Nutrition Contact to Community Bridges Meals on Wheels Program. Community Bridges has been providing these services for 40 years in our community, and has been an outstanding partner in that effort. The Proposal Review Panel also expressed thanks and complimented the other applicant (Grey Bears) on the quality of their proposal and their history of local service to older adults as well.

Grey Bears was provided our RFP Appeals form, and did submit a response using that form.

Discussion of Grey Bears Submission
The document submitted by Grey Bears states that we did not violate our established process. Our appeals process and form clearly state that the appeal “must be based on procedural or process issues.” Disagreeing with the results of the process is not grounds to appeal.

Additionally, the first paragraph of the Grey Bears document states “… we accept the Review Panel’s decision…..” A redacted version of this portion of the document is included in the Board Packet.
The Executive Committee of our Board of Directors held a special meeting to discuss this document, and determined that it does not meet the criteria of an appeal. Additionally, the document does not request that our decision to fund Community Bridges be overturned or delayed.

Additional Action/Follow-up with Grey Bears
The Grey Bears document contains a number of request and recommendations, including some that are already in place, and others that are planned for the future. A few of the suggestions indicate misunderstanding about our process or are unrealistic, or request the sharing of confidential or proprietary information. Executive Director and the Executive Committee will provide a detailed written response to the Grey Bears regarding the various components of their correspondence, but not until after the Board takes official action on the RFP. I will also make myself available for in-person or virtual discussion with Grey Bears leadership about the process, including how they can strengthen future applications.

Advisory Council Action
The Advisory Council is scheduled to reiterate (or change) their support for the Proposal Review Panel’s funding recommendations, and certify the process to date.

Board of Director Action
The Board of Directors is scheduled to make a final decision on the selection of our Santa Cruz County Title III C Nutrition provider following the preliminary action taken during the March 2022 Board meeting. That March action was the endorsement the Proposal Review Panel’s recommendation of Community Bridges/Meals on Wheels as the 2022-25 provider of senior nutrition services in Santa Cruz County.

The Board action will be considered as direction to staff to pursue the final details of executing a new contract with the selected provider, including adjusting contract content and award amounts to reflect the actual dollars received from the California Department of Aging.
NAME OF APPLICANT ORGANIZATION: Grey Bears

CONTACT PERSON: Tim Brattan    PHONE: 831-479-1055 ext 224

ADDRESS: 2710 Chanticleer Ave

CITY: Santa Cruz    ZIP CODE: 95065    EMAIL: tim@greybears.org

Appeals of preliminary contract and funding award decisions made by the Seniors Council’s Board of Directors must be based on procedural or process issues. No appeal will be considered which simply disagrees with or protests the award decisions.

WAS THE ESTABLISHED PROCESS VIOLATED?  YES  NO

IF YES, HOW? IF NOT, DESCRIBE FLAWS YOU PERCEIVED IN THE PROCESS:

First of all, we appreciated the opportunity to apply for Title III-C-1 and III-C-2 program funding and all of the work by your staff, Board and Advisory Council on coordinating the RFP process.

While we accept the Review Panel's decision, we feel it important to share the following...
DATE: April 14, 2022

TO: AAA Advisory Council
    Seniors Council Board of Directors

FROM: Patty Talbott, Planner

RE: 2022-23 Update to the 2020-24 AREA PLAN

Included with this report is the draft summary of the 2022-23 Update to the 2020-24 Area Plan. This report summarizes the key components of the full Area Plan including:

- **Planning Calendar** showing status of Area Plan and Provider Contract Cycle
- **Goals and objectives.** Goal #4 has been updated to reflect inclusion of Master Plan for Aging. Updates to objectives are highlighted in blue. Please note that objectives with a “PD” or “C” are funded with a very small amount of allowable direct service Title IIB funding which must be approved by the Department of Aging.
- **Proposed service units and funding.** Final awards have not yet been received by the California Department of Aging. Pending finalization of the RFP process and receipt of final funding amounts from the Department of Aging, funding awards and proposed service units will be developed to be included in the Plan Update. The targets used for 2021-22 contract year are provided as estimates only for reference and do not reflect actual contract amounts.

**Services in the plan do not reflect additional services funded by COVID relief funding.** In addition to COVID funding, such as American Rescue Plan, there are additional temporary funding streams coming through CDA. These services may not be included in the Area Plan and each must be tracked and reported separately.

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 updated full plan will uploaded to our website upon completion of service unit plans and other required updates as soon as the information is received.

**ACTION REQUESTED**
- Review draft Update summary and revised goals and objectives.
- Approve draft Area Plan Update Summary
# Seniors Council of Santa Cruz San Benito Counties

## AREA AGENCY ON AGING LONG-RANGE PLANNING CALENDAR

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<tr>
<th>PROGRAM YEAR</th>
<th>2021-22</th>
<th>2022-23</th>
<th>2023-24</th>
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<tr>
<td>AREA PLAN ON AGING ACTIVITIES</td>
<td>Year 2 of 4</td>
<td>Year 3 of 4</td>
<td>Year 4 of 4</td>
<td>Year 1 of 4</td>
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<tr>
<td></td>
<td>Prepare 2022-23 Annual Update</td>
<td>Prepare 2023-24 Annual Update</td>
<td>Needs Assessment for next 4-year plan</td>
<td>Prepare 2024-28 Area Plan</td>
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<th>PROGRAM YEAR</th>
<th>2021-22</th>
<th>2022-23</th>
<th>2023-24</th>
<th>2024-25</th>
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<tbody>
<tr>
<td>FUNDING AWARDS AND ALLOCATIONS</td>
<td>Contracts extended 1 year due to COVID (through June, 2022)</td>
<td>Year 1 of 3 Contracts beginning July, 2022</td>
<td>Year 2 of 3</td>
<td>Year 3 of 3</td>
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<td>Conduct RFP for 2022-25 contract cycle</td>
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<td>Conduct RFP for 2025-29 contract cycle</td>
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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
2022-23 UPDATE
Executive Summary
DRAFT

PLANNING AND SERVICE AREA 13
Santa Cruz and San Benito Counties

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

Written questions or comments on the draft Update must be received by April 19
And directed to Patty Talbott, AAA Planner at paddyt@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 85,000 seniors (age 60+) and their caregivers 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 2021-22 these funds totaled more $2.5 million.** Nearly all program funding contracted out to local service providers. *(Funding amount includes only ongoing Area Plan funding, and does not include COVID response or other limited term funding)*
- **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 2022-23 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 2022, the 60+ population is:*
- **Santa Cruz County:** 71,798 persons age 60 or older with 21,282 age 75+
- **San Benito County:** 14,078 persons age 60 or older with 4,068 age 75+

*Source: 2022 California Department of Finance Population Projections.*
THE AREA AGENCY ON AGING PLANNING AND CONTRACT CYCLE

![Diagram]

- **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. Planning for the next AAA needs assessment will begin in 2023.

- **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 2022-23 program year will be the third 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, provider contracts were extended through June 30, 2022. During Program Year 2021-22, the AAA completed a Request for Proposals for services for a 2022-25 Contract Cycle. Approved service providers will be awarded funds on a 3-year funding cycle to bring the contract cycle back in alignment, 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 UNPRECEDENTED CHALLENGES

After the devastating CZU Lightning Complex fires and navigating two full years of the COVID-19 pandemic, the AAA and it’s contracted service provider network continue to rise to the occasion as we move towards full reopening of services. The AAA service provider network and the senior service delivery network as whole has truly been put to the test during these challenging times. Through the use of both time-tested service models and innovative modifications our network continued 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 2022-23 AREA PLAN UPDATE

2022-23 FUNDING: Funding awards for 2022-23 Area Plan contract funds have only been released as preliminary planning estimates at this time. We do not anticipate any significant changes to funding levels for Older Americans Act Programs from 2021-22 levels, although there will be some minor adjustments within the service categories as a result of the Request for Proposals process.

2022-23 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. Additional services funded by COVID relief funds, including American Rescue Plan funding, must be tracked separately and may not included in the Area Plan service unit plans.

2022-23 GOALS AND OBJECTIVES:
- Goal 4 has been revised to reflect involvement in local Master Plan for Aging planning.
- Proposed revisions to existing objectives are in blue.

PRIORITIES FOR THE AREA AGENCY ON AGING IN 2022-23
- 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.
- Engage in and provide expertise to, development of local playbooks for the Master Plan for Aging.
- Provide visible leadership at the State level with participation on the State Master Plan on Aging Workgroup 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.
- 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.
GOAL 1: VISIBLE LEADERSHIP. The AAA will provide visible leadership and effective advocacy to promote the needs of seniors and caregivers. (see also Goal 4: Master Plan for Aging/Age Friendly Communities)

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.

Objectives funded with Title IIIIB Direct Service funding for Program Development or Coordination are indicated with a “PD” or “C.” These objectives are limited in scope and must be approved by the California Department of Aging.

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 Workgroup 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: State funding will be allocated that addresses objectives of the Master Plan for Aging 7/1/22-6/30/23 Status: Revised

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. 7/1/22-6/30/23 Status: Continued

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 communities in Santa Cruz and San Benito Counties, providing local expertise and planning support as appropriate, with a goal of a coordinated planning effort. Measurement: number of trainings, informational meetings and jurisdictions taking action to commit to Age Friendly/Livable Communities Projects. 7/1/22-6/30/23 Status: Revised

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. 7/1/22-6/30/23 Status: Continued
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 and San Benito County Social Services Transportation Advisory Committee. Measurement: regular attendance and participation at these meetings. 7/1/22-6/30/23  
**Status:** Continued

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 including American Rescue Plan Act funding. Efforts will focus on the safe delivery of services and allowable service modifications during the transition, and as reopening continues, ensure that providers of senior services receive accurate and timely information. The effort may also include development of new programs, partners and projects. Measurement: documentation of coordinated planning, response and utilization of COVID emergency funds during reopening. 7/1/22-6/30/23  
**Status:** Revised
2020-24 AREA PLAN DRAFT NARRATIVE GOALS AND OBJECTIVES

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. During 2021-22, the AAA completed the 2022-25 Requests for Proposals. During 2022-23, the AAA will begin the first year of the 3-year 2022-25 Service Provider Contract Cycle. Contracted providers will be awarded one-year contracts, renewable annually up to two times, provided contractor remains in good standing and availability of funding. Measurement: Successful execution of AAA service provider funding contracts for the 2022-23 program year. 7/1/22-6/30/23 Status: Revised

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 with nutrition providers receiving annual onsite monitoring. Measurement: completion of ongoing service and fiscal performance monitor and site visits and technical support as needed. 7/1/22-6/30/23 Status: Continued

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 IIIB Supportive Services, Title IIIC Nutrition Programs, Title IIID 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. 7/1/22-6/30/23 Status: Continued
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 and the recognition of HIV position seniors as a new population included in greatest social need. Measurement: client data reporting 7/1/22-6/30/23 Status: Revised

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. Measurement: A plan to develop a Santa Cruz County ADRC will be explored) 7/1/22-6/30/23 Status: Continuing

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. Focus during 2022-23 will be senior center directors meetings and building relationships with healthcare providers such as Kaiser and the Central California Alliance for Health. Measurement: production of educational materials and webinars that educate and improve the health of older adults and persons with disabilities, 7/1/22-6/30/23 Status: Revised
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. In San Benito County, services will be well coordinated with ADRC services. Measurement: achievement of service unit targets, distribution of resource guides and maintenance of websites. 7/1/22-6/30/23  Status: Revised

3.2 ADRC San Benito County. After the successful transition of the San Benito County Aging and Disability Resource Connection (ADRC) from “emerging” to “designated” status by the Department of Aging, the AAA Executive Director and Special Projects Coordinator, in collaboration with Jovenes de Antaño and the Central Coast Independent Living Center, and the San Benito County Aging and Long Term Care Commission will continue their work to expand and enhance the “no wrong door" system in San Benito County for seniors and persons with disabilities. Measurement: increasing utilization of the ADRC for seniors and persons with disabilities 7/1/22-6/30/23  Status: Revised

3.3 Maintain and support key focal points for senior services.
3.3.1 Working with key partners including County Supervisors, senior service providers, state legislators and other partners, the AAA Executive Director will continue efforts to preserve the Live Oak Senior Center, potentially slated to be converted to teacher housing, as a designated focal point for key AAA services including Information and Assistance, HICAP, the senior nutrition program and as a senior dining site. Measurement: Maintenance of the key focal point for senior services in the Greater Santa Cruz Area 7/1/22-6/30/23  Status: Revised C

3.3.2 The AAA Executive Director will actively participate in the City of Watsonville Senior Center/Community Program workgroup to address new, 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. 7/1/22-6/30/23  Status: Continuing
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 7/1/22-6/30/23  
**Status: Continued**

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  Measurement: achievement of program benchmarks and successful initiatives during COVID-19 to increase access to residents. 7/1/22-6/30/23  
**Status: Continued**

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. 7/1/22-6/30/23  
**Status: Continued**

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 7/1/22-6/30/23  
**Status: Continued**

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 assistance while 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 and expansion of service delivery to San Benito County. Measurement: number of returns completed, total dollar amount of refunds and number of late filings prepared. 7/1/22-6/30/23  
**Status: Revised**

3.9 **Senior Farmers Market Vouchers.** The AAA Registered Dietitian 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. 7/1/22-6/30/23  
**Status: Continued**

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 7/1/22-6/30/23  
**Status: Continued**
GOAL 4: MASTER PLAN FOR AGING AND AGE-FRIENDLY, LIVABLE COMMUNITIES. The AAA will actively participate in the development of local playbooks for the Master Plan for Aging and Age Friendly Communities efforts in the PSA.

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. Both the Master Plan for Aging and 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 Active engagement in the development of local playbooks for Master Plan for Aging. The AAA Executive Director and key staff will actively engage in efforts to development local playbooks with specific objectives for the Master Plan for Aging. In Santa Cruz County, staff will actively engage with the County’s MPA workgroup. In San Benito County, AAA staff will support the formation of, and participate in, a MPA workgroup to develop a local playbook. Status: New 7/1/22-6/30/23

4.2 Reduce senior loneliness and isolation Building on prior years work, AAA staff will continue efforts to coordinate local efforts to reduce senior loneliness and isolation. During 2022-23, the AAA, in coordination with the San Benito County ADRC, will complete implementation of the Department of Aging’s CHAT program, providing no-cost iPads and internet connectivity to low-income, isolated seniors. Measurement: Completed distribution of iPads provided by the Department of Aging’s CHAT program. 7/1/22-6/30/23 Status: Revised

4.3 Develop tools to help bridge the digital divide. Collaborate with the AAA-funded providers and other community partners and local counties on local efforts to reduce isolation and bridge the digital divide. Measurement: development of increased access to technology and number of older adults provided with equipment, training and connectivity. 7/1/22-6/30/23 Status: Revised

4.4 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 and 2021-22. During 2022-23, 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. Title IIIB funded services will be coordinated with AAA Falls Prevention program efforts in the PSA. Measurement: number of seniors served and number of Title IIIB minor home modifications reported through NAPIS reporting during 2021-22. 7/1/22-6/30/23 Status: Revised
4.5 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 implementation of a falls prevention program as reopening continues. 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. 7/1/22-6/30/23 Status: Revised

4.6 Provide Health Promotion Programs: Through the use of Title III-D 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 2022-23 focus will be on transitioning to in person service delivery. Programs planned to be offered may include Matter of Balance, Tai Chi for Falls Prevention, Enhance Fitness and Bingoize. Measurement: number of volunteers trained and class sessions provided with Title III-D funding. 7/1/22-6/30/23 Status: Revised

4.7 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, Ombudsmen 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. 7/1/22-6/30/23

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. Measurement: Expansion of opportunities for seniors to access affordable, reliable in-home help. 7/1/22-6/30/23 Status: Continued

4.8 Local Disaster Preparedness. The AAA will continue to monitor the safe reopening of senior services, including regular updates at monthly Aging and Disability Service Provider meetings. 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. 7/1/22-6/30/23 Status: Continued
2022-23 SERVICES TO BE FUNDED WITH AREA PLAN FUNDS

Current year targets used for example only-final CDA funding not yet received

SERVICES WILL CONTINUE TO BE DELIVERED WITH MODIFICATION FOR COVID UNTIL APPROVED TO CHANGE. DOES NOT INCLUDE SERVICES FUNDED WITH COVID RELIEF FUNDS

<table>
<thead>
<tr>
<th>TITLE III OLDER AMERICANS ACT</th>
<th>UNIT OF SERVICE</th>
<th>2021-22 TARGETS</th>
</tr>
</thead>
<tbody>
<tr>
<td>IIIB SUPPORTIVE SERVICES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Case Management</td>
<td>hour</td>
<td>350</td>
</tr>
<tr>
<td>Mealsite Transportation</td>
<td>one-way trip</td>
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</tr>
<tr>
<td>Legal Assistance</td>
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<td>Information &amp; Assistance</td>
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<tr>
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<tr>
<td>Personal Affairs Assistance*</td>
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</tr>
<tr>
<td>Residential Repairs/Minor Home Modification</td>
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<tr>
<td>Visiting</td>
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<tr>
<td></td>
<td>hour</td>
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<tr>
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<tr>
<td>C2: Congregate Meals</td>
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<td>Nutrition Ed *</td>
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<td></td>
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<tr>
<td>TITLE IIID HEALTH PROMOTION</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Includes Matter of Balance and may include</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tai Chi, Enhance Fitness or Bingocize</td>
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<td></td>
</tr>
<tr>
<td>TITLE IIIE FAMILY CAREGIVER SUPPORT</td>
<td></td>
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<tr>
<td>Support Services</td>
<td>hour</td>
<td>410</td>
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<tr>
<td>Respite Care</td>
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<td>Supplemental Services</td>
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<tr>
<td>OMBUDSMAN/ELDER ABUSE PREVENTION</td>
<td>Targets developed from CDA benchmarks</td>
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</tr>
<tr>
<td>HEALTH INS. COUNSELING &amp; ADVOCACY</td>
<td>Targets developed by CMS/CDA</td>
<td></td>
</tr>
</tbody>
</table>

*denotes direct service of AAA
2022-23 CONTRACTED SERVICE PROVIDERS AND SERVICES
PENDING FINAL RFP AWARDS

SERVING SANTA CRUZ COUNTY ONLY

Community Bridges
   Meals at Senior Dining Sites
   Transportation to Meal Sites

Family Service Agency
   Peer Counseling and Friendly Visiting

Senior Network Services
   Information and Assistance
   Case Management
   Visiting
   Family Caregiver Support Program

Volunteer Center
   Helping Hands Senior Home Repair

SERVING SAN BENITO COUNTY ONLY

Jovenes de Antaño
   Information and Assistance
   Case Management
   Family Caregiver Support Program

   Home-delivered Meals
   Meals at Senior Dining Sites
   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

AREA AGENCY ON AGING DIRECT SERVICES

Project SCOUT Tax Assistance
Health Promotion Activities
Outreach/Senior Farmer’s Market Voucher Distribution
Program Development & Coordination Activities

*note: AAA Direct Services utilize less than 3% of available service funding
Date: 4-15-22

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 is finally slowing down in the older adult community and we are beginning to transition back to more normal delivery models. Mealttime in Santa Cruz County have re-opened, schools are normalizing, and we're in the process of re-opening our Foster Grandparent and Senior Companion Programs. ALL of these services are, of course, still using appropriate precautions to keep staff and those we serve as safe as possible. San Benito County mealtime remain closed, in part because remodeling of the Hollister Community Center and its kitchen are being planned. No clear timeline exists, unfortunately.

ARPA, OARR, & NUTRITION INFRASTRUCTURE FUNDING
Funding amounts for ARPA (American Rescue Plan Act), parts of OARR (Older Adults Recovery and Resilience), and Senior Nutrition Infrastructure have been shared with AAA's, along with guidelines for some. Substantial funding is available, with various guidelines, flexibilities, and uses, and various levels of clarity, confusions and contradictory information being communicated. Additionally funds in additional categories remain possible, but details are sketchy.

We intend to continue our tradition of overfunding San Benito County Services by allocating 25% of each of these service categories to San Benito County, and 75% for services in Santa Cruz County, to the maximum extent possible. If demand for service in one county or the other fails to match the available funds, adjustments may occur.

Here's an overview of each category, as they currently stand:

ARPA: Approximately $1,000,000 available for our service providers after AAA
Administrative funds are allocated. Funds must be spent by September 30, 2024. Funding falls into existing Older Americans Act Titles and need to align with existing service categories. Allocation to existing providers for existing services will not require an RFP, but services outside of those categories or providers will.

**Our Tentative Plan:** Split these funds equally between FYs 2022-23 and 2023-24. Announce the availability of these funds to our known senior service network and related allies. Request a short application of one to two pages, in a style similar to what we do with our OTO funds and Families First and Cares Act dollars showing equipment to be purchased, seniors to be served, and cost of service. Convene an ARPA Review Committee to recommend funding allocations to the Board for final action. **Timeline:** Upon Completion of Nutrition Infrastructure Spending Plan.

Annual allocations to service providers are expected to be about:

<table>
<thead>
<tr>
<th></th>
<th>IIIB Supportive Services</th>
<th>IIIC1 Congregate Nutrition</th>
<th>IIIC2 Home Delivered Meals</th>
<th>IIID Preventive Services</th>
<th>IIIE Family Caregiver</th>
<th>VII Ombuds</th>
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<tr>
<td>Santa Cruz County</td>
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<td>$362,852</td>
<td>$35,479</td>
<td>$115,730</td>
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**OARR:** Approximately $200,000 in funding for Senior Legal Services, to be spent by December 31, 2023. Other OARR funding probably won’t go through AAA’s, but that’s subject to change.

**Our Tentative Plan:** Award $100,000 each for FY 2022-23 and FY 2023-24 to Senior Citizens Legal Services for augmentation of their current services.

**Timeline:** In process, pending receipt of guidelines from CDA. Expected start date of July 1, 2022.

**Nutrition Infrastructure:** Approximately $600,000 available for our service providers after AAA Administrative funds are allocated. Funds must be spent by December 31,
2023. A spending plan must be submitted to CDA by June 30, 2022. Funding must be used for services that provide for senior food/meals, but can’t be used for leasehold improvements. Existing services are prioritized. More clarity is needed from CDA regarding required procedures and initial program guidance.

**Our Tentative Plan:** Announce the availability of these funds to our known senior service network and related allies. Request a short application, showing equipment to be purchased, seniors to be served, and cost of service. Convene a Proposal Review Committee, modeled after our OTO procedure and our work with Families First Act and CARE Act allocations.

**Timeline:** Currently in the development stages. Draft Plan to be brought to the Board of Directors for approval at June Board meeting.

**Other notes:** Funding was originally allocated as part of the State’s 20222 Budget, but was then shifted to a federal funding source, causing a long delay in funding release (now anticipated as in late fall of 2022 at the earliest) and in program guidance. Payment to contractors expected to be lengthy and may create cash flow challenges.

**MASTER PLAN FOR AGING IN PSA-13**
Efforts continue to develop local playbooks in our region for the implementation of Governor Newsom’s Master Plan for Aging. Santa Cruz County is in the process of selecting a consultant firm to conduct a survey of local seniors. Alicia Morales and I are working to coordinate presentations before local commissions and advisory bodies, with the goal of engaging Santa Cruz County older adults into the process. I’ve suggested that the Local Playbook presentation that the AAA Advisory Council presented last year be used as the outline for such presentations. Alicia is sharing that document with the County’s Master Plan on Aging consultant as a tool for her to develop a final product.

The San Benito County MPA group has yet to meet, but the commitment among key players remains.

**COMMUNITY ACTIVITIES & STAFFING**
As usual, our staff and I continue to be actively engaged in various state and local coordination and innovative projects, including County Commissions and Advisory Bodies, the statewide Master Plan for Aging Stakeholder Advisory Committee, Legislative and Budget efforts, California Association of Area Agencies on Aging, and others.

Tania Wildbill has now been in place for one month as our new Foster Grandparent/Senior Companion Program (FGP/SCP) Director and is making excellent progress at learning the skills and complexities of that program. We are recruiting for two open positions at this time; Program Specialist for FGP/SCP, and our new Administrative Services Officer.
DATE: April 15, 2022

TO: Seniors Council Board of Directors

FROM: Gus Ceballos, Program Director

RE: Falls Prevention Program, March 2022 report

Companion for Life

Proof of Income verification for 2022 is complete. About 20 subscribers who had previously been receiving discounted service either no longer qualified or did not respond. All affected subscribers had been notified of fee adjustments. All are aware that we are open to provide discounted service if they fall upon hardship of any kind.

New Medical Guardian equipment has been inspected and there doesn’t seem to be any discernable upgrade beyond that of a cosmetic nature. At this point we have no plans to swap our equipment to the new revisions.

We have had an increase of subscribers calling the office asking if their equipment will continue to work after the discontinuation of 3G cellular service this year. Again, I repeated that landline users (including VoIP, like Xfinity or U-Verse) don’t uses a cellular signal and all current cellular based buttons run on 4G with plans to upgrade to 5G as soon as they can.

A Matter of Balance

A class we scheduled for March had to be canceled for lack of participants.

We are in the process of finalizing two spring classes at London Nelson Center. They will be presented in April and will run into June of 2022. Dates are confirmed, we just need to make payment on the rental spaces.

We are still working on getting a class into Mid-County Senior Center.
In-Home Risk Assessment

We currently have nine at-risk individuals assessed and waiting on medical equipment. We currently have a handyman/contractor on retainer to assist us with minor home repairs in Santa Cruz County.

The search for a handyman/contractor for San Benito County continues.
## Project Name: Seniors Council Foster Grandparent Program

**Grant Year:** 7/1/21 - 6/30/22

<table>
<thead>
<tr>
<th>Month</th>
<th>Cumulative Actual Hours</th>
<th>Cumulative Goal Hours</th>
<th>Monthly VSY Actual</th>
<th>Monthly Goal</th>
<th>FY 20-21 Vols. Active</th>
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<td><strong>135,489</strong></td>
<td><strong>173,675</strong></td>
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**March Averages**
- Hours /Day: 128
- Days in mth: 23
- Avg Hrs/day: 6
- Days in wk: 4.60
- Avg Hrs/week: 25.68

**OVER/UNDER**
- HOURS: -38,193
- STIPEND: -$114,579.57
- VSYs: -36.58

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**21-22 VSY Goal 175**

**VSY Actual to Target (Cumulative)**

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"July through September data includes CNCS approved Temporary Stipend Allowance hours. October through February data includes CNCS approved Alternative Service Hours. March data includes CNCS approved Temporary Stipend Allowance hours."
Project Name: Seniors Council Senior Companion Program  
Grant Year: 7/1/21 - 6/30/22

<table>
<thead>
<tr>
<th>Month</th>
<th>Cumulative Hours Actual</th>
<th>Cumulative Hours Goal</th>
<th>Monthly VSY Hours Actual</th>
<th>Monthly Hours Goal</th>
<th>Monthly FY 20-21 Actuats</th>
<th>Monthly Vols. Active</th>
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<td>1,964</td>
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<td>April</td>
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<td>2.53</td>
<td>2,326</td>
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<tr>
<td>TOTAL</td>
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<td>20,296</td>
<td>32,364</td>
<td>26,499</td>
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</table>

- July through September data includes CNCS approved Temporary Stipend Allowance hours. October through February data includes CNCS approved Alternative Service Hours. March data includes CNCS approved Temporary Stipend Allowance hours.

- OVER/UNDER HOURS: -8,823
- STIPEND: -$26,470.13
- VSYs: -8.45

**VSY Actual to Target (Cumulative)**

**Month**

**Volunteer Hours**

- 0
- 5,000
- 10,000
- 15,000
- 20,000
- 25,000
- 30,000
- 35,000
ADRC of San Benito County
Staff Report – April 2022

Staff from the San Benito County ADRC have been involved in outreach and awareness planning conversations and meetings to build greater ADRC recognition and awareness among both other human service providers - - potential extended ADRC partners - - as well as potential consumers and caregivers. A core group of San Benito County Aging and Long Term Care Commission (ALTCC) members and regular guests are interested in organizing as a local County and community-based service providers group to promote services offered by the individual organizations represented, as well as provide LTSS information more broadly and collectively throughout the County. This group has discussed participating in and hosting more in-person events throughout the spring and summer in hopes that the on-going levels of COVID-19 transmission and associated protocols will allow for such gatherings. Tabling at the Hollister Farmers Market, as well as a series of workshops or similar informational and educational events for professionals, have been discussed and further conversations are planned.

Discussions regarding the ADRC messaging and presentation content for the Hazel Hawkins Volunteer Recognition Luncheon in May are on-going. The opportunity to present briefly (10 minutes) regarding the ADRC, its core service offerings, and the principles of person centeredness, informed decision-making, and the No Wrong Door Network is a great one, and not to be squandered, as these dedicated volunteers are trusted sources of information for others, as well as being significant community influencers.

With the easing of COVID-19 safety protocols and in-person event restrictions, other ideas for outreach activities include hosting an ADRC Open House, or a series of meet-and-greet events, for local human service professionals, as a way of helping to build awareness of the ADRC and to begin forging deeper and more expansive partnerships through introductions and relationship building. Along with offering no-cost education and training through the ADRC as well as professional education curriculum such as the previously noted Transition Services certificate through BU-CADER, the ADRC staff plan to engage potential partners individually and organizationally by way of distribution of the 2022 San Benito County Aging & Disability Resource Directory.

Work continues on the previously reported ADRC agreement to underwrite a series of six (6) BenitoLink stories on a variety of topics, including: the Aging & Disability Resource Connection (ADRC); No Wrong Door systems change; person-centered service planning and supports; community-based non-profit and County Services partnerships leading to improved more sustainable consumer outcomes; the Master Plan on Aging; Livable Communities for all ages and abilities; intergenerational programs; and the value, impact, and influence of senior volunteers in service to communities. ADRC staff is working with BenitoLink reporter, Robert Eliason, to provide additional content, as well as trying to identify individuals willing to be interviewed around their lived experiences with specific support needs and services. We hope to provide greater understanding about community living alternatives and promote more substantive community conversation around LTSS.

ADRC staff is finalizing a list of partner participants for Transition Services certification through BU-CADER. As Transition Services are a core offering of the ADRC, we are interested in seeing other partner organizations and staff involved in the transition of older adults between care settings similarly trained to help build common understanding, develop common practices, and help facilitate and support the coordinated work of the sometimes many entities who may be involved in successful transitions of individuals from hospital or rehabilitation to home. Please contact Britt Bassoni at (831) 688-0400 x113
or brttb@seniorscouncil.org if you have any questions, or if you or a member of your organization is interested in participating in this 4 credit unit asynchronous on-line course.

ADRC staff just completed and submitted the ADRC Cares Act grant report for the period October 1, 2021 – March 31, 2022. Interestingly, the report is a tabulation and accounting of ADRC CARES Act and pandemic-related services and supports “provided within your entire ADRC during the reporting period, not solely from grant-specific activities (CDA 7020 i Rev 03-2022),” so the reconciliation has been challenging and the communication on that point with partners have left some confused as to what and how their own organizationally delivered services should be counted. Direct service numbers for the ADRC No Wrong Door network in San Benito County were down from the previous six-month period, and this on-going confusion, as well as limited partner reporting response may be the reason for the drop in unduplicated consumers receiving services supports through network providers. Additionally, there could also certainly be some seasonal fluctuation in the number of individuals served owing to the end-of-year holidays, some organizational closures during this period, and fewer people reaching out for assistance. We do not yet have enough baseline and temporal data to support one conclusion or another, but will be working diligently with Core and Extended partners in the coming months to be sure to capture as much reportable data as possible and clear up any on-going confusion regarding both the reportable services, but also partner obligations to share such data as a part of our collective ADRC partnership obligation to one another and to State funders.

Finally, ADRC staff continue exploration of possible awareness and access support for COVID-19 vaccines through the use of ADRC COVID Vaccine Access funding. One consideration for this San Benito County effort, where vaccine uptake among older adults is relatively high in the northern part of the County and relatively low in the southern half of the County is to create a direct mailing containing COVID vaccine access information. The cost to mail such to nearly 10,000 addresses of those over the age 55 in San Benito County is +/- $15,000, but represents a scaled effort, appropriately directed, and involving a minimal amount of staff time and coordination. Currently we have two competitive quotes and pricing, and are seeking a third. The quotes are based on the materials options, address lists or labels, printing costs, and postage for the campaign.
PROJECT SCOUT
MARCH 2022 Report

Project SCOUT was able to assist over 1,000 clients in the month of March due to its dedicated crew of volunteers and staff! The total number of processed tax returns as of the end of March is as follows:

**Project SCOUT VITA (under 60):**
- Number of Federal returns prepared – 210
- Dollar Amount of Total refunds – $229,616.00
- Dollar Amount of Federal EITC Claimed – $78,138.00
- Primary or Secondary 60+ - 4

**Project SCOUT TCE (60 and above):**
- Number of Federal returns prepared – 605
- Dollar Amount of Total refunds – $332,442.00
- Dollar Amount of Federal EITC Claimed – $63,623.00
- Primary or Secondary 60+ - 442

**Project SCOUT Tax Prep Total:**
- Number of Federal returns prepared – 815
- Dollar Amount of Total refunds – $562,058
- Dollar Amount of Federal EITC Claimed – $141,761.00
- Primary or Secondary 60+ - 446
- **TOTAL amount of refunds including the cost of an average tax return of $175.00 = $704,683.00!!**

Project SCOUT remains committed to the health and safety of our most vulnerable populations, and even though health mandates are changing, and as sites are reopening, we are maintaining our protocols as follows:
1-Drop offs by appointment at Project SCOUT’s two offices in Watsonville and Aptos. Drop-offs constitute of clients providing all necessary tax-related information for taxes. Appointments at sites will be given by phone and health assessment will be given when making appointment. Clients will be required to wear mask and asked to bring their vaccination card. If no card, they will be serviced outside of office or separate from volunteers. If a client is sick or feeling ill, the client will be given an appointment in the future. If clients are not vaccinated or do not have vaccination card, they will be provided assistance outside of building.

2-Drop offs by appointment at Ad-Hoc sites throughout the county following the same protocols. Those partners that have joined us this tax season are the following with their appointment numbers:

**SENIOR CENTERS:**

- Highlands Park Senior Center (Ben Lomond) (831) 336-8900
- Market Street Senior Center (Santa Cruz) (831) 426-6640
- Watsonville Senior Center (Watsonville) (831) 768-3279
- Jovenes de Antano (Hollister) (831) 637-9275

**COMMUNITY CENTERS:**

- Mountain Community Resources (Felton) 831-724-2997 ext. 213
- Nueva Vista Community Resources (Santa Cruz) 831-724-2997 ext. 213
- Live Oak Community Resources (Live Oak) 831-724-2997 ext. 213
- La Manzana Community Resources (Watsonville) 831-724-2997 ext. 213
- Santa Cruz Immigration Project (Watsonville) 831-724-5667

**OTHERS:**

- Santa Cruz Community Credit Union (Santa Cruz) 831-425-7708
- Santa Cruz Public Library (Santa Cruz) 831-427-7707

3-We continue providing our “Facilitated Self Assistance” option where clients can do their own taxes with the help of our volunteers. The link: [http://tinyurl.com/SCOUTSFSA](http://tinyurl.com/SCOUTSFSA)

4-Clients who are willing and able to do a full return online are paired with volunteers working from home who assist using web apps such as Zoom, Google Meet, or the like. Encrypted email and Google Docs is used to support this method.
STATISTICS:

Total Clients assisted in the month of MARCH:
- 1055

Total Clients assisted with tax preparation in the month of MARCH:
- 575

Total Clients waiting for completion of their taxes as of the end of MARCH:
- 46

Total Clients assisted with tax related questions, appointments, or not needing to file in MARCH:
- 429

Total Clients waiting for a call back as of the end of MARCH:
- 51

Total clients receiving assistance from outside of Santa Cruz County (San Benito):
- 16