



**AREA AGENCY ON AGING**  
San Benito & Santa Cruz Counties

**FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM**  
Monterey, San Benito, Santa Clara & Santa Cruz Counties

**PROJECT SCOUT**  
Tax Counseling Assistance

**AGING & DISABILITY RESOURCE CONNECTION**  
Navigating the San Benito County Senior & Disability Services Network

## **SENIORS COUNCIL BOARD OF DIRECTORS**

**Thursday, February 20, 2025**

**10 a.m. – 12 Noon**

**Hybrid in-person - Zoom Meeting**  
**236 Santa Cruz Ave, Aptos CA**

**<https://us02web.zoom.us/j/81931049538>**

**Meeting ID: 819 3104 9538**  
**One tap mobile**  
**+12532158782,,81931049538# US (Tacoma)**

**Dial by your location**  
**+1 669 900 6833 US (San Jose)**  
**Find your local number: <https://us02web.zoom.us/j/81931049538>**

## **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 the January 2025 Board Meeting

**234 Santa Cruz Avenue • Aptos, California 95003**      **[www.seniorscouncil.org](http://www.seniorscouncil.org)**  
PHONE: AAA – (831) 688-0400 • FG/SCP – (831) 475-0816 • SCOUT – 1-877-373-8297 • FAX: (831) 688-1225

SUPPORTED BY FEDERAL, STATE & LOCAL GOVERNMENTS, FOUNDATIONS, THE UNITED WAYS OF  
MONTEREY, SAN BENITO, & SANTA CRUZ COUNTIES & YOUR PRIVATE DONATIONS

- 10:15 6. Committee Reports
1. Finance Committee
  2. Advocacy Committee
    - a. Live Oak Senior Center
    - b. California Senior Legislature
    - c. Santa Cruz County & City Community Program Funding
  3. Executive Committee  
*Personnel Policy Change re: Bereavement Leave*
  4. Nominating & Board Development
- 10:50 7. AAA Request For Proposals 2025-29
1. Overview
  2. Draft Timeline
  3. Current Funding & Discussion
- 11:00 8. Nutrition Modernization Act Funding
- 11:35 9. Executive Director's Report
1. Master Plan for Aging & Solutions Summits
  2. State & Community Activities
- 11:45 10. Program Reports (written)
1. Project SCOUT
  2. Foster Grandparent/Senior Companion Program
  3. Aging & Disability Resource Connection (ADRC)
- 11:55 11. Miscellaneous Correspondence & Other Items
- 12 Noon 12. Adjourn

***Next Meeting:***  
***Thursday March 20, 2025***

### **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.





AREA AGENCY ON AGING  
San Benito & Santa Cruz Counties

FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM  
Monterey, San Benito, Santa Clara & Santa Cruz Counties

PROJECT SCOUT  
Tax Counseling Assistance

AGING & DISABILITY RESOURCE CONNECTION  
Navigating the San Benito County Senior & Disability Services Network

## SENIORS COUNCIL BOARD OF DIRECTORS

(Held by Zoom in accordance with COVID-19 social distancing requirements)

January 16, 2025

### MINUTES

#### BOARD MEMBERS PRESENT:

Pam Arnsberger (President); Jane Schwickerath (Vice-President); Wayne Norton (Secretary); Gwen Yeo; Mickie Luna; Tami Aviles; Lisa Berkowitz; Antonio Rivas

#### BOARD MEMBERS EXCUSED:

Mark Trabing; Cathy Cress

#### STAFF PRESENT:

Clay Kempf (Executive Director); Britt Bassoni (ADRC Director); Hilary Minugh (Fiscal Specialist); Patty Talbott (AAA Administrator); Zach Johnson (Administrative Services Officer); Corey Shaffer (Community Coordinator); Maureen Hebert (Fiscal Assistant); Cathy Colvard (Fiscal Officer); Leanne Olivera (ADRC)

#### OTHERS PRESENT:

Dana Wagner (Director, Meals on Wheels)

#### 1. Welcome, Call to Order and Introductions

Meeting was called to order at 10:03 AM. Introductions were made.

#### 2. Additions & Deletions to the Agenda

None.

#### 3. Receive Announcements from Board Members

Mickie asked for the Board to keep recent high school traffic victims in mind.

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

None.

#### 5. CONSENT AGENDA

Wayne noted that SJB section, center is named “Mary Velasco Sellen” Senior Center. Lisa corrected that Patty said Caren Dix’ participation is required.

**MOTION, Berkowitz/Norton, to approve minutes of December 2024 Board Meeting. PASSED.**

234 Santa Cruz Avenue • Aptos, California 95003      [www.seniorscouncil.org](http://www.seniorscouncil.org)  
PHONE: AAA – (831) 688-0400 • FG/SCP – (831) 475-0816 • SCOUT – 1-877-373-8297 • FAX: (831) 688-1225

SUPPORTED BY FEDERAL, STATE & LOCAL GOVERNMENTS, FOUNDATIONS, THE UNITED WAYS OF  
MONTEREY, SAN BENITO, & SANTA CRUZ COUNTIES & YOUR PRIVATE DONATIONS

5-1

## 6. Committee Reports

1. Finance Committee – Committee met, proposed a budget (in packet).
  - a. Agencywide P & L – Review of individual program budgets and full-agency; informational item, no action required. Multiple audits ongoing. Gwen asked about disaster kit expenses, Hilary clarified that this is from ARPA/COVID dollars (not regular funds). Not in fact over-budget – reclaimed some unspent funds and moved them into backpack fund. Discussion of distribution of kits. Pam has some leads, and Lisa suggested targeting areas impacted by fires. Britt will connect with Highlands Park Senior Center.
  - b. Proposed Petty Cash Policy Revision – Mickie recommended Petty Cash be increased to \$400 to accommodate increased expenses. **MOTION, Norton/Schwickerath**, to approve raising Petty Cash on hand to \$500. **PASSED.**
2. Advocacy Committee
  - a. Live Oak Senior Center – Live Oak School District has evicted Senior Network Services, now effective as of early February. SNS feels this is retaliatory to their maintenance requests and other activities, and will be exploring legal remedies. SNS now remodeling offices on Soquel Dr. and will relocate services. CORE cuts impacted 70-80% of agencies providing service in the region. Now is a good opportunity to pursue changes to CORE with incoming electeds. Continue small-group meetings with electeds and public comment periods at Board of Supervisors meeting (being sure to include positive impacts of funding). Lisa encouraged Board members to meet with newly elected Supervisors in their district. Wayne said Advocacy Committee will lead effort, but all Members should participate. Gwen volunteered for District 2. Lisa and Pam will discuss involving the Rotary club.
  - b. California Senior Legislature – Mickie said CSL will be updating their proposals, reflecting changes in membership, to focus on San Joaquin Valley and/or Central Coast. Next meeting on Jan. 23<sup>rd</sup>. Jane asked if both Mickie and Jane are on Advocacy Committee; Antonio updates regularly, and Mickie already on Finance.
  - c. Santa Cruz County & City Community Program Funding – Discussed previously. Clay added that State Governor's budget was released, only minor cuts to Health and Senior Services (not accounting for LA fires yet) and overall budget is balanced.
3. Executive Committee – Mostly discussed RFP, will cover later.
4. Nominating & Board Development – no report.

## 7. AAA Request for Proposals 2025-29

1. Overview – Clay recapped process so far since Jan. 7<sup>th</sup> release of RFP. Competitive applications mostly in San Benito County, over meals etc. and family caregivers. In Santa Cruz, applicants for nutrition funding reached cooperative agreement. Also in SCZ, SNS withdrew application for family caregiver, so no competition. Wayne noted that he has a conflict and will not be participating in discussions or voting on three meal contracts in SBC.
2. Draft Timeline – Due date is February 18<sup>th</sup>. Bidder's conference held 1/14/25. Next step is convening proposal review panel. Two of three original panel no longer available (Allan Timms and Yvette Brooks). Mark Johannessen, Mindy Sotelo (new SBC Supervisor), and Steve Clark (new Scotts Valley City Council) have volunteered to serve on panel; Angela Curro may also join. Board membership set. Now working on community members through Community

Foundations.

Group discussed whether to keep Kevin on review panel if no SCZ applicants, decided to leave choice up to him.

3. Current Funding & Discussion – Lisa pointed out that SC Community Foundation still has ~\$750,000 left over from Live Oak Senior Center dissolution, and Jane added there may be \$600,000 from an individual's trust. Gwen suggested we ask someone from CF to give report to the Board; Jane proposed approaching Susan True.

## 8. CDA Budget Amendment/One-Time Only Funding

Clay pointed to the Executive Director's report in packet. Discussed how OTO funds are collected from unspent funds and redistributed to AAAs. Mini-RFP produces recommendation for Board. This year timing issues combined with other pressures to prevent possibility of mini-RFP, so staff created list of recommendations, page 8-2; Clay provided breakdown by category. Gwen asked when OTO funds must be spent, Clay replied by June 30. **MOTION, Yeo/Luna**, to approve staff recommendations. **PASSED.**

## 9. Executive Director's Report

1. Master Plan for Aging & Solutions Summits
2. State & Community Activities – Clay discussed Nutrition Modernization Act Funds. Funding through 2029 was secured in 2023. Clay gave a recap of activity of funding strategies to date, and presented allocation plan from packet through end of 2029 fiscal year. Described over-allocation to some agencies, especially Community Bridges, and corrections to be made.

Mickie asked about unspent funds at Jovenes de Antaño this year, seems to be due to reporting confusion at JdA. Group discussed issues at JdA and how to remedy them, including possibly redistributing funds to Community Bridges. Jane noted that JdA's Board needs to be responsible for their agency. Lisa asked if there is a waiting list for meals in SJB, Clay said as many as 90 people while funds are unspent. Dana said MOW could easily absorb any funds. Antonio proposed cutting funds to prompt JdA Board to act. Hilary clarified that this is a reimbursement program, and JdA has not received any funding other than what they've provided proof for. Clay reviewed provider allocation spreadsheet. Discussion of funding specifics for JdA and accountability. Suggestion that funds be redistributed from JdA to other programs; Wayne opposes. Review of service provider allocations on spreadsheet. Clay suggested deferring any action by a month to allow JdA to respond, and noted that CB is also losing funding. Pam requested two motions; to approve funding allocations, and to make recommendation to JdA Board to meet with Exec. Committee.

**MOTION, Schwickerath/**, to approve staff recommendation for disposition of nutrition funds as presented. **NO SECOND.**

**MOTION, Rivas/**, to reallocate \$41,000 from Jovenes de Antaño to Community Bridges. **NO SECOND.**

**MOTION, Berkowitz/Yeo**, to send a letter to Jovenes' Board within one week to provide them a warning about concerns and possibility of funds being removed. **PASSED; Rivas votes No.**

Pam requested that all SC Board members receive a copy of the letter when it is sent. Pam asked what happens to funds if they are not spent. Clay said we have until 2029 to spend some, but other must be spent by March 2026, and noted looming cuts to other service providers. Group discussed possible alternatives. Britt proposed adding a Read Receipt to letter to JdA Board, and Lisa proposed including a deadline for their response.

Discussion of details of Community Bridges funding and potential impacts of changes. Current CB contract is \$278,000, will be reduced to \$166,844. After including \$70,000 of OTO funding this leaves a \$40,000 funding gap.

**MOTION, Norton/Yeo**, to amend contract with Community Bridges to allocate \$166,884 in current and future year, and to set \$40,000 aside to cover remaining gap in the future (source TBD). **PASSED; Rivas abstains.**

**10. Program Reports (written) –**

1. Project SCOUT – Pam praised Ed’s report and encouraged everyone to read it carefully.
2. *Foster Grandparent/Senior Companion Program*
3. *Aging & Disability Resource Connection (ADRC)*

**11. Miscellaneous Correspondence & Other Items**

Included in packet, not discussed.

**12. Adjourn**

The meeting was adjourned at 12:11 PM

Next Meeting: February 20, 2025 10 a.m. – 12 Noon

Minutes prepared by: Zachary Johnson





**AREA AGENCY ON AGING**  
San Benito & Santa Cruz Counties

**FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM**  
Monterey, San Benito, Santa Clara & Santa Cruz Counties

**PROJECT SCOUT**  
Tax Counseling Assistance

**FALLS PREVENTION PROGRAM**  
Emergency Response Systems, Assessments & Training

**Date:** 2-14-25

**To:** Seniors Council Board of Directors

**From:** Clay Kempf, Executive Director

**RE:** February Advocacy Committee Report

**Live Oak Senior Center:** Live Oak School District (LOSD) has officially evicted Senior Network Services (SNS) two eviction notices from their 45+ year home at the Live Oak Senior Center. Senior Network Services has moved their Live Oak operations into expanded space at their offices on 3333 Soquel Dr., near 41st Ave and the Silver Spur restaurant.

**SANTA CRUZ COUNTY & CITY CORE (COLLECTIVE OF RESULTS & EVIDENCE-BASED INVESTMENTS) FUNDING**

Included in your packet is our list of Ten Recommendations to Improve Santa Cruz County & City's CORE process. These recommendations will be sent to both governing bodies along with Santa Cruz County Health & Human Services Agency (HSA) staff. HSA staff oversee the CORE process. Many of these recommendations have been raised previously regarding CORE in verbal discussions and public comments.

**LOCAL CRISIS IN SENIOR SERVICES**

The combination of the eviction of Senior Network Services, long the hub of Santa Cruz County senior services (Live Oak Senior Center), local funding reductions for Meals on Wheels, Information and Assistance, Empowered Aging, Senior Volunteerism, Nursing Home Protection, Senior Shared Housing, and other programs, combined with unprecedented growth in the older adult population and people in need has created a true crisis for our community. Our Advocacy Committee will continue to explore new and expanded ways to elevate the conversation about possible mitigations to this crisis.

**DEI CHALLENGES**

The challenges of President Trump's Executive Orders to eliminate DEI program funding was a significant component of our Advocacy Committee's last meeting. As discussed in my Executive Director's report, next steps for us are unclear.

6.2





AREA AGENCY ON AGING  
San Benito & Santa Cruz Counties

FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM  
Monterey, San Benito, Santa Clara & Santa Cruz Counties

PROJECT SCOUT  
Tax Counseling Assistance

AGING & DISABILITY RESOURCE CONNECTION  
Navigating the San Benito County Senior & Disability Services Network

Date: 2-20-2025

To: Seniors Council Board of Directors

From: Zachary Johnson, Administrative Services Officer

RE: Mandatory update to Bereavement Leave policy

Per recent updates to California employment law, it is recommended that our Personnel Policies be amended as follows:

**Current Wording (VI.F, pg. 34):**

In the event of a death in the employee's immediate family or any person living in the immediate household of the employee, bereavement leave with pay up to three (3) working days shall be granted with the approval of the Executive Director. Leave beyond three days may be charged against accrued sick leave or vacation leave time.

**Recommended Updates to Wording:**

In the event of a death in the employee's immediate family or any person living in the immediate household of the employee, bereavement leave ~~with pay~~ up to **five (5)** working days shall be granted with the approval of the Executive Director, **three of which will be paid**. Leave beyond **five** days may be charged against accrued sick leave or vacation leave time.

**To be eligible for bereavement leave an employee must have been employed for at least 30 days before taking the leave. Employees may take up to five (5) days of bereavement leave per death in their immediate household. Employees may divide their leave over multiple periods, to be completed within three months after the death of the person for whom they are taking leave.**

6.3





**AREA AGENCY ON AGING**  
San Benito & Santa Cruz Counties

**FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM**  
Monterey, San Benito, Santa Clara & Santa Cruz Counties

**PROJECT SCOUT**  
Tax Counseling Assistance

**AGING & DISABILITY RESOURCE CONNECTION**  
Navigating the San Benito County Senior & Disability Services Network

**Date:** 2-13-25

**To:** Seniors Council Board of Directors, AAA Advisory Council

**From:** Clay Kempf, Executive Director

**RE:** Modernizing Older Californians Act Nutrition Funding Update

**CC:** Danny Barrera, Jovenes de Antaño  
Dana Wagner, Meals on Wheels of Santa Cruz County

### **BACKGROUND**

Nutrition Modernization (NM) funding, covering not only the current fiscal year, but also how we intend to distribute those funds throughout their lifecycle - which extends all the way to the end of March of 2029 - was discussed and acted up during our February 2025 Board of Directors meeting.

The Board voted to distribute the bulk of the funding on an equal basis for each of the upcoming fiscal years (starting in 2025-26) through 2028-29, and splitting those funds on our traditional 75%/25% between Santa Cruz & San Benito Counties. The funding will be allocated to whoever is our contractor for senior nutrition services in each county, with the flexibility to use them for either home-delivered meals or congregate dining centers, depending on need.

Annual amounts will be \$166,884 to the Santa Cruz County Contracted Nutrition Provider, and \$55,628 for the provider in San Benito County.

In separate action, Community Bridges was awarded \$80,645 in one-time only nutrition funding for FY 2024-25, and Jovenes de Antaño awarded \$26,882 in these same one-time only funds.

### **FUNDING FOR 2024/25**

Additional discussion took place regarding the current year allocations to each provider. Jovenes de Antaño's current year allocation of these NM funds includes the \$55,628 mentioned above, plus, \$41,163 in unspent funds from fiscal year 2023/24). As of this writing, none of the \$55,628 and none of the \$41,163 have been spent in the first eight

8-1

months of our current fiscal year. Area Plan funds (the bulk of senior nutrition program) are also behind pace on being fully expended at Jovenes.

Community Bridges original notification of \$278,140 in Nutrition Modernization funding was reduced to the \$166,884 as part of our action to provide stable funding through 2028/29. That \$111,256 reduction was partially offset by the one-time only award of \$80,645. However, there is still a shortage of \$30,611 from their original allocations. Community Bridges has been fully expending both their Area Plan funds and the Nutrition Modification funding, and at the rate of the original \$278,140 allocation.

Board Action was to allocate an additional \$40,000 to Community Bridges for the current fiscal year (July 1 2024-June 30 2025), and for staff to report back to the Board on where those funds would come from. Two options were being considered, either;

- 1) decreasing each of Community Bridges future allocations of \$166,884 by \$10,000 and spending those dollars now; or
- 2) redirecting the unspent \$41,163 2023-24 amount from Jovenes de Antaño and awarding those funds to Community Bridges.

Part of option 2 included Seniors Council fiscal staff confirming whether or not Jovenes has made any progress in spending their current year allocation, and the Executive Director informing Jovenes staff and Board of the pending loss of these funds.

Per the direction of our Board, Jovenes was informed of this potential redirection of funding, and our fiscal staff has continued to provide technical assistance to Jovenes regarding their accounting services. No response has been received regarding the potential loss of funds, and Seniors Council fiscal staff reports no progress has been made regarding Jovenes spending their 2023-24 NM allocation, nor spending any of the NM funding for the current 2024-25 year. Jovenes staff and Board members were invited to attend both the AAA Advisory Council and the Seniors Council Board of Directors meetings and participate in the discussion of these possible actions.

#### **STAFF RECOMMENDATION**

Area Agency on Aging staff have discussed the situation multiple times, including today. We are unanimous in our opinions that the most appropriate action is to redirect the unspent 2023-24 \$41,163 away from Jovenes de Antaño and to the Meals on Wheels program of Community Bridges. We are confident that Community Bridges will spend these funds in a timely and appropriate manner.

The Board of Directors should discuss the two options presented in this memo, and take action to adopt one or the other, or develop an alternative approach to providing additional funds to Community Bridges Meals on Wheels program for FY 2024-25.



AREA AGENCY ON AGING  
San Benito & Santa Cruz Counties

FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM  
Monterey, San Benito, Santa Clara & Santa Cruz Counties

PROJECT SCOUT  
Tax Counseling Assistance

AGING & DISABILITY RESOURCE CONNECTION  
Navigating the San Benito County Senior & Disability Services Network

### Suggested Strategies and Improvements Community Program Funding - including CORE

The process used currently to determine community program funding allocations, or, CORE (Collective Of Results and Evidence-based Investments) funding if you prefer, has been rife with controversy, with concerns raised by elected officials, funding organizations, community programs and members of the public. Without revisiting the validity or details of those concerns, we present the following recommendations for improving the process in the future.

#### Ten Recommendations (details follow)

1. Each funding cycle should include a **report** from County staff displaying previous funding levels, impacts, and individuals served.
2. Revisit the Purpose of Community Program/CORE funding, and the definition of the Social Safety Net that it has historically supported.
3. Prioritize CORE funding to programs that meet critical needs of vulnerable individuals and populations.
4. Commit CORE funding to supporting and strengthening the local social safety net.
5. Align program funding priorities with existing local community plans and projects.
6. When programs are de-funded, explain why.
7. Reinstate County on-site reviews of funded programs.
8. Clarify whether the funding is intended for CBOs, Government agencies, or ?
9. Form a Community Program Funding Task Force
10. Stop using CORE/Community Program funding to finance special projects

Additional Detail:

1. Each funding cycle should include a report from County staff displaying previous funding levels of all applicants, clients served, and impact of that funding, in addition to recommended awards and funding requests. Without full information, the Board of

Supervisors (and City Councilmembers) cannot make responsible decisions, regardless of their good intentions.

2. Revisit the Purpose of Community Program/CORE funding, and the definition of the Social Safety Net that it has historically supported. The previously adopted Social Safety Net Definition is:

"Through its investment in public agencies and Community Programs, the County of Santa Cruz supports the existence of culturally competent social safety net services as an essential function of government so that people have access to the basic necessities of life - shelter, food, physical safety, health, and a minimum level of financial resources. Programs that help vulnerable people access sufficient resources to lead a healthy and successful life or prevent the circumstances that put them at risk are part of the safety net."

3. Prioritize CORE funding to programs that meet critical needs of vulnerable individuals and populations. Programs that provide life-sustaining services, such as food, shelter, protection from abuse and critical health care should receive the highest priority for funding. Programs that improve the ability of at-risk individuals to transition out of poverty by providing education, daycare, access to support & services, additional revenue, etc. deserve to be the next highest ranking. Other support programs that elevate the human condition are also deserving of consideration. Balancing emerging needs and proportional investments across demographics should be part of the prioritization. Programs that can be funded by other sources should be encouraged to apply to those sources and not be prioritized over those providing life-saving or life-sustaining services.

4. Commit CORE funding to supporting and strengthening the local social safety net offered by community-based organizations. Randomly funding and de-funding various programs every three years effectively shreds the community's ability to provide program stability to address the needs of our most vulnerable least stable residents. The goal needs to be supporting and stabilizing safety net programs. Starting and stopping program operations of well-run organizations does no good for anyone. Imagine, for example, if work on Highway One was stopped next month because a new funding cycle had arrived, and a different project was more appealing. Leaving effective food programs, protection from abuse programs, and/or shelter programs with sudden funding cuts makes no more sense than leaving Highway One construction suddenly unfunded in the hopes that "crews will find new funding sources to finish the job".

5. Align program funding priorities with existing local community plans and projects. Examples include the County Strategic Plan, the CAB Plan to Address Poverty; the Area Plan on Aging, the First Five Strategic Priorities, etc. Resources are limited, and funds are best spent when done as part of a community vision. This also allows funding to augment existing projects and increases collaboration and partnerships.

6. When programs are de-funded, a report on the impacts of those cuts and mitigation strategies to replace them should be part of the recommendation, including transitional continuity plans for 120 days. Otherwise, funding becomes a process of funding a temporary solution and re-creating a previous problem.



7. Reinstate County staff to perform on-site reviews of funded programs. Schedule staff to present a report to the Board every two years regarding their findings. This creates program accountability and improvement, and serves as one vehicle for the Supervisors and the public to learn about community program effectiveness, including ability to leverage non-County and non-City funding to deliver services. It also puts the "Results" back into CORE (Collective Of Results and Evidence-based Investments). Additionally, it provides background data for corrective action plans or loss of future funding for programs failing to deliver quality services.

8. Clarify who the funding is intended for. Public entities like other cities, or organizations not located in Santa Cruz County, or programs operated by school districts, city or county departments should not be eligible to apply for CORE funding in the future.

9. Form a Community Program Funding Task Force that addresses funding shortages and works to develop expanded revenues to allow effective programs to grow and prosper. Increasing the available pool of funding was one of the stated goals of the CORE Project, but one that never came to fruition or was explored in any meaningful way. Other local jurisdictions and funders could be participants in this effort.

10. Stop using CORE/Community Program funding to finance special projects. County staff repeatedly reports that CORE funds are a very small part of overall human services revenue and expense, but extremely effective. If those statements are true (and we have no reason to believe they aren't), special projects and/or focus areas should come from larger pools of money, not CORE.

### **Community Program Funding Must Continue To Evolve And Change**

Amazing County and City staff, including Wil Lightbourne, Susan Mauriello, Cecilia Espinola and Ellen Timberlake have all been part of past efforts to improve the process. Current County Supervisors, City Councilmembers and staff join these leaders, and dozens of former electeds & staff who have been part of this evolution, including both mistakes and successes. No system will ever be perfect, but every system can strive to improve its current status. Optimistically, these recommendations can open a dialogue to address and improve our current community program funding process.





**AREA AGENCY ON AGING**  
San Benito & Santa Cruz Counties

**FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM**  
Monterey, San Benito, Santa Clara & Santa Cruz Counties

**PROJECT SCOUT**  
Tax Counseling Assistance

**AGING & DISABILITY RESOURCE CONNECTION**  
Navigating the San Benito County Senior & Disability Services Network

**Date:** 2-14-25

**To:** Seniors Council Board of Directors, AAA Advisory Council

**From:** Clay Kempf, Executive Director

**RE:** Executive Director's January Report

**MASTER PLAN FOR AGING (MPA) & SOLUTIONS SUMMITS**

Solutions Summits continue to meet, with Corey Shaffer scheduling and chairing each of the five San Benito County workgroups, and Zach Johnson doing the same in Santa Cruz County.

We're beginning the process for developing the Master Plan for Aging Local Playbooks, and about to distribute surveys to the MPA Local Playbook Advisory Committees that we have. The Aging and Long Term Care Commission of San Benito County holds that role for our SBCo efforts and they've been notified this is coming. The Santa Cruz County Governance Committee, however, has no meeting scheduled, and needs new leadership with Zach Friend and Bruce McPherson having both stepped down from the Santa Cruz County Board of Supervisors.

**AGENCY OPERATIONS**

Everything is on schedule for our move to 175 Westridge Dr. in Watsonville (near the former West Marine Building for those familiar with the area). Remodeling is just mostly completed, and the space is now being painted and receiving new carpeting. Our agency moved is scheduled for March 3, 2025. Britt Bassoni, Cristina Bañuelos and I continue to work remotely and/or play musical chairs when we're at the Aptos office. I'm continuing to use our space at the Hollister Epicenter on some Fridays. The Hollister office space continues to help us stay connected to San Benito County, and highlights our ADRC and upcoming Volunteer Connection efforts.

Speaking of the Volunteer Connection efforts, we have gone live with our website and with the project! Corey is providing additional information in our packets.

9-1

## **FEDERAL DIVERSITY, EQUITY & INCLUSION (DEI) ORDERS**

The Trump Administration has issued Executive Orders to cease all funding for DEI activities, including demands to not only stop these activities within government but also in Community Based Organizations that receive federal funds. Given that we're also required by state and federal regulations to target at-risk populations, AND that we comply with a variety of non-discrimination laws and policies, we have quite the quandary before us, regardless of one's political views.

I'm including in our packet information that was received today from our second largest funder, Americorps, about this very issue, and requiring us to turn around their request for information by Feb 19th.

This issue warrants far more discussion than these comments. CDA hasn't shared any information on the matter with us other than to say they're monitoring the developments, and we're sure there is much more to come, via both our funders and in the reactions of our partners in local agencies and local government.

## **FEDERAL FUNDING**

Much is unknown about changes to our funding in response to the current federal administration. So far, our programs have only been targeted for reduction via the DEI implications, but we're working with our national allies to stay abreast of potential changes. Senior programs usually receive non-partisan support, but with Medicare and Social Security part of fund reductions discussions, we're unsure of what will happen next.



February 14, 2025

Ruth Mackenzie  
County of Sacramento  
700 H St  
Ste 3650  
Sacramento, CA 95814

RE: Executive Order Compliance - Action Required

Grant Number: 23SFICA001  
Application ID: 24SF264871

Dear Ruth Mackenzie,

As previously shared, AmeriCorps is continuing to review all applicable executive orders, memoranda, and corresponding guidance issued since January 20, 2025, by President Trump, the Office of Management and Budget, and the Office of Personnel Management. AmeriCorps is taking proactive action to ensure alignment with these directives and the Trump-Vance Administration priorities.

The agency has reviewed current AmeriCorps awards to ensure compliance with these directives and administration priorities. We are writing today to provide you with an update of that review:

Based on this review, the language below from your application requires clarification:

24SF264871

- The other narrative includes the following terms: Diversity, Equity; Racial Equity ; DEI

It is unclear whether the above-quoted language from your application indicates that your program is using Federal funds to promote or provide services out of compliance of the recent Executive Orders.

Please review your application for compliance with executive orders, and take one of the following actions:

1. If you assess the above award is **compliant** with executive orders and no revisions are required, complete the self-certification.
  - a. Reply all to this letter by email by February 19, 2025. Copy and paste this statement below into the body of that email:

"I certify that Sacramento County Foster Grandparent Program, 24SF264871 complies with all administration Executive Orders and does not include any activities that promote DEI activities."

Emails must be sent by the Authorized Representative to the following inbox [West@americorps.gov](mailto:West@americorps.gov) and Cc your Portfolio Manager.

9-3



2. If you assess the above award is currently **noncompliant** within the scope of your approved grant activities, to maintain your AmeriCorps award, you must: Stop providing those services in your program/ project immediately.
  - a. Initiate an amendment to your most recent award 24SF264871 and remove or update any language related to out of compliance activities.
  - b. Submit that amendment by February 19, 2025.
  
3. If you assess the above award is currently **noncompliant** within the scope of your approved grant activities, and you no longer wish to remain an AmeriCorps grantee/sponsor, you may relinquish your award.
  - a. Please email your Regional Office with your intent to relinquish by February 19, 2025. They will provide further instruction upon receipt of your email.

In order to ensure AmeriCorps is in full compliance, County of Sacramento is required to respond to this letter by **February 19, 2025**, end of day local time. It is critical that action is taken, and AmeriCorps receives responsiveness. If we do not receive your response by **February 19, 2025**, adverse action up to and including termination of awards may begin.

Your regional office team is available to support you through this decision. Thank you for your immediate attention to this matter.

Sincerely,  
Alexia Armstrong Cortes

Cc: West@americorps.gov

9-4



February 14, 2025

Clay Kempf  
SENIORS COUNCIL OF SANTA CRUZ AND SAN BENITO COUNTIES  
234 Santa Cruz Ave  
Aptos, CA 95003

RE: Executive Order Compliance - Action Required

Grant Number: 23SFICA004  
Application ID: 24SF263406

Dear Clay Kempf,

As previously shared, AmeriCorps is continuing to review all applicable executive orders, memoranda, and corresponding guidance issued since January 20, 2025, by President Trump, the Office of Management and Budget, and the Office of Personnel Management. AmeriCorps is taking proactive action to ensure alignment with these directives and the Trump-Vance Administration priorities.

The agency has reviewed current AmeriCorps awards to ensure compliance with these directives and administration priorities. We are writing today to provide you with an update of that review:

Based on this review, the language below from your application requires clarification:

24SF263406

- The other narrative includes the following terms: Gender Identity; DEI

It is unclear whether the above-quoted language from your application indicates that your program is using Federal funds to promote or provide services out of compliance of the recent Executive Orders.

Please review your application for compliance with executive orders, and take one of the following actions:

1. If you assess the above award is **compliant** with executive orders and no revisions are required, complete the self-certification.
  - a. Reply all to this letter by email by February 19, 2025. Copy and paste this statement below into the body of that email:

"I certify that Seniors Council Santa Cruz/San Benito, 24SF263406 complies with all administration Executive Orders and does not include any activities that promote DEI activities."

Emails must be sent by the Authorized Representative to the following inbox [West@americorps.gov](mailto:West@americorps.gov) and Cc your Portfolio Manager.

2. If you assess the above award is currently **noncompliant** within the scope of your approved grant activities, to maintain your AmeriCorps award, you must: Stop providing those services in your program/ project immediately.

9-5



- a. Initiate an amendment to your most recent award 24SF263406 and remove or update any language related to out of compliance activities.
  - b. Submit that amendment by February 19, 2025.
3. If you assess the above award is currently **noncompliant** within the scope of your approved grant activities, and you no longer wish to remain an AmeriCorps grantee/sponsor, you may relinquish your award.
  - a. Please email your Regional Office with your intent to relinquish by February 19, 2025. They will provide further instruction upon receipt of your email.

In order to ensure AmeriCorps is in full compliance, SENIORS COUNCIL OF SANTA CRUZ AND SAN BENITO COUNTIES is required to respond to this letter by **February 19, 2025**, end of day local time. It is critical that action is taken, and AmeriCorps receives responsiveness. If we do not receive your response by **February 19, 2025**, adverse action up to and including termination of awards may begin.

Your regional office team is available to support you through this decision. Thank you for your immediate attention to this matter.

Sincerely,  
Erica Ortega

Cc: West@americorps.gov

9-6



## Zachary Johnson

---

**From:** Ortega, Erica <EOrtega@americorps.gov>  
**Sent:** Friday, February 14, 2025 9:56 AM  
**To:** Clay Kempf  
**Cc:** Cristina Banuelos; Cathleen Colvard; West  
**Subject:** Executive Order Compliance – Response Required by February 19th  
**Attachments:** Executive Order Compliance Instructions.pdf; Executive Order - Potential Noncompliance\_23SFICA001.pdf; Executive Order - Potential Noncompliance\_23SFICA004.pdf

**Importance:** High

Dear Clay Kempf,

As previously shared, AmeriCorps is continuing to review all applicable executive orders, memoranda, and corresponding guidance issued since January 20, 2025, by President Trump, the Office of Management and Budget, and the Office of Personnel Management. AmeriCorps is taking proactive action to ensure compliance with these directives and the Trump-Vance Administration priorities.

Please review the attached guidance and letters regarding your AmeriCorps awards. Immediate action is required, and you must complete this process and reply all to this email by **February 19, 2025**. Given the short review period, regional offices will have limited capacity to provide support through this process. We will do our best to respond to questions.

Sincerely,

**Erica Ortega**

Portfolio Manager, West Region

Office of Regional Operations

[AmeriCorps.gov](https://americorps.gov)

O: (213) 347-5264 M: (202) 876-6591




9-7



# Executive Order Compliance Instructions

February 13, 2025

9-8

A decorative graphic at the bottom of the page consisting of several horizontal lines in red, white, and blue, with a stepped, wavy edge on the right side.

250 E Street SW  
Washington, D.C. 20525  
202-606-5000/ 800-942-2677

## Table of Contents

Background .....	1
Timeline.....	1
Overview .....	1
Procedure .....	2
State Commission Instructions .....	5
Frequently Asked Questions .....	5
Appendix .....	7

## Background

As shared in an email sent by Carly Bruder, Acting Chief Program Officer on February 11, 2025, AmeriCorps is continuing to review all applicable executive orders, memoranda and corresponding guidance issued since January 20, 2025, by President Trump, the Office of Management and Budget and the Office of Personnel Management.

The agency is reviewing all current AmeriCorps awards to ensure compliance with these directives and administration priorities. This document includes guidance on next steps in this process to ensure compliance with these directives.

## Timeline

All grantees must respond to the Executive Order Compliance email by **February 19, 2025**, by submitting one of the following: a self-certification statement, a grant amendment to move your program into compliance with the executive orders, or a relinquishment letter. Your response to the Executive Order Compliance email should be sent to your Portfolio Manager and cc the region inbox for your state. In rare circumstances extensions to this deadline may be approved by regional office staff upon request.

## Overview

AmeriCorps conducted a review of active grants to identify activities described in each grant application that may not comply with executive orders.

All aspects of AmeriCorps grants/awards must comply with President Trump's executive orders, including, but not limited to:

- Grant applications for AmeriCorps resources
- Activities performed by AmeriCorps members/volunteers
- Training provided to members/volunteers
- Program materials, such as volunteer/member applications, enrollment forms, service opportunity listings, and handbooks

9-9



- Social media and website posts about your AmeriCorps award

Grantees/sponsors must also ensure all sub applicants/volunteer stations/operating sites/host sites are compliant with executive orders through their memorandum of understanding and subsite monitoring.

The agency sent one of two letters for each project, one for grants that appear to be in compliance with the executive orders or a second for grants that include language that may not be in compliance.

### **Required Responses**

If your organization received the first letter – Titled, “Executive Order Self-Certification Required,” then:

- Your organization can self-certify that this award (meaning all aspects of the grant activities described in the application and carried out under this grant, as described above) is in compliance. If you believe this award is not in compliance with the executive orders outlined in Appendix A, you may request to amend your grant or consider relinquishment.

If your organization received the second letter – Titled, “Executive Order – Potential Noncompliance,” then:

- Your organization must review the sections that are identified in the letter as potentially being noncompliant.
- If your review determines the award (meaning all aspects of the grant activities described in the application and carried out under this grant, as described above) is compliant with executive orders, you can self-certify for this award.
- If any of the program activities are not in compliance with the executive orders, you must submit an amendment to the award to move it into compliance by **February 19, 2025** or email by **February 19, 2025** expressing an intent to relinquish

**Amending the application (s) (and potentially VADS for VISTA):** If your project is conducting noncompliant activities within the scope of your approved grant(s), and you wish to remain an AmeriCorps grantee/sponsor, then you must cease these activities immediately, initiate an amendment to your most recent award and remove or update any language related to out of compliance activities. If you have multiple awards, you must update each application that had findings.

**Relinquishment:** If your project is conducting noncompliant activities within the scope of your approved grant(s), and you wish to relinquish, then you must email the Regional Office by **February 19, 2025** expressing intent to relinquish. The Regional Office will provide additional instructions upon receipt.

## Procedure

### **Self-Certification Instructions**

9-10



To self-certify, your organization must review the executive orders in Appendix A and affirm that your AmeriCorps grant/award complies with President Trump’s executive orders. If any language from your application is highlighted as requiring clarification in the attached letter, please review this section of your application to determine whether it conflicts with any executive orders and make updates as necessary. If you determine your project is in full compliance and the narrative (and VAD for VISTA projects) complies with the executive orders, you must email your Portfolio Manager and cc your region-specific mailbox listed below with the following statement:

- [MidAtlantic@americorps.gov](mailto:MidAtlantic@americorps.gov)
- [Midwest@americorps.gov](mailto:Midwest@americorps.gov)
- [Mountain@americorps.gov](mailto:Mountain@americorps.gov)
- [NorthCentral@americorps.gov](mailto:NorthCentral@americorps.gov)
- [Northeast@americorps.gov](mailto:Northeast@americorps.gov)
- [SouthCentral@americorps.gov](mailto:SouthCentral@americorps.gov)
- [Southeast@americorps.gov](mailto:Southeast@americorps.gov)
- [West@americorps.gov](mailto:West@americorps.gov)

“I certify that [Program Name], [application ID] complies with all administration Executive Orders and does not include any activities that promote DEI activities.”

If any activities outlined in your application or VADS do not fully comply with the executive orders, you cannot self-certify, and must amend your grant or relinquish the award.

### **Amending your award to address non-compliance**

If you need to amend your award to comply with the executive orders, your organization must initiate an amendment in eGrants.

Selecting amendment types: The amendment types that are relevant for this work are: Modify Performance Measures or Workplans, Revise Budget, and Revise Narrative. Consider what amendment types will be necessary to make all your proposed changes.

Existing amendments: If you already have an existing amendment open on a grant, you can combine this amendment with your current amendment if it can be completed by **February 19**. If you cannot complete an open amendment by **February 19**, please delete that amendment and create a new one for this process.

**VISTA Sponsors** may also need to amend the VISTA Assignment Description (VAD) to comply with the executive orders, and these also must be initiated through eGrants by your organization by **February 19, 2025**.

**Volunteer Generation Fund** grantees funded through American Rescue Plan will need to update their recently submitted FY 25 VGF ARP Continuation application. VGF ARP grantees will not submit an amendment but will make changes directly to their application once the Portfolio Manager has returned it in eGrants. If you have resolution items that were identified

9-11



during the initial review, please complete them at the same time as addressing EO non-compliance.

Links to grantee amendment award processing guidance by program:

- [AmeriCorps Seniors, VISTA, Volunteer Generation Fund, and Days of Service Amendment to Modify Grant Award Guidance](#)
- [AmeriCorps VISTA Amendment to VISTA Assignment Description \(VAD\) Guidance](#)
- [Initiating, Processing, or Requesting Post-Award Amendments on ASN Awards](#)

Grantees may make any necessary changes to the application to bring it into compliance so long as it complies with all program policies and requirements. This may require changes to staff roles and activities, member or volunteer roles and activities, trainings, service sites, performance measures, budget and any other components of a program that may conflict with the executive orders. Amendments to move into full compliance are due by **February 19**.

### Relinquishment Instructions

If your organization determines that your AmeriCorps project cannot be brought into compliance or that your organization no longer wishes to operate this project with AmeriCorps funding, please send a letter by **February 19** to your portfolio manager, with a copy to your region-specific mailbox listed below, indicating your intention to relinquish this award. Please include the grant number and proposed end date.

Your Regional Office will set-up a meeting with you to review the status of the grant funds for close-out. The grantee is responsible for completing the final project progress report and financial reports.

Region Mailboxes for cc:

- [MidAtlantic@americorps.gov](mailto:MidAtlantic@americorps.gov)
- [Midwest@americorps.gov](mailto:Midwest@americorps.gov)
- [Mountain@americorps.gov](mailto:Mountain@americorps.gov)
- [NorthCentral@americorps.gov](mailto:NorthCentral@americorps.gov)
- [Northeast@americorps.gov](mailto:Northeast@americorps.gov)
- [SouthCentral@americorps.gov](mailto:SouthCentral@americorps.gov)
- [Southeast@americorps.gov](mailto:Southeast@americorps.gov)
- [West@americorps.gov](mailto:West@americorps.gov)

9-12



## State Commission Instructions

The email you received included letters for your commission grants and a spreadsheet with review results for your subapplicants. You must review the grants referenced in the letters and self-certify they comply with all executive orders. To self-certify grants awarded to your commission, i.e.: CSG, CIF, VISTA, you must follow the above self certification, amendment, or relinquishment instructions.

To certify your subapplicant portfolio, you must use the attached spreadsheet.

For subapplicants included on the No Compliance Issue Identified tab you must certify that these sub applicants comply with all Executive Orders by:

- Copying and pasting the appropriate response next to each listed sub application:
  - I certify that [Program Name], [Application ID] complies with all administration Executive Orders and does not include any activities that promote DEI activities **OR**
  - The sub application is currently **noncompliant** within the scope of approved grant activities and requires an amendment to ensure compliance. The commission will inform the PM and initiate the amendment **OR**
  - This sub application must be relinquished. The commission will initiate this process.

For subapplicants included on the Potential Compliance Issue Identified tab you must:

- Instruct the program to immediately stop all noncompliant activities.
- The program must immediately initiate an amendment in eGrants to remove the noncompliant language and/or activities from their application.
- If the program chooses not to amend its grant to bring it into compliance it must relinquish its award.
- If you feel this assessment was in error, you must note this on the provided spreadsheet and in the Notes column self-certifying that the project is in compliance.

You must reply all to the email you received, including your Portfolio Manager *and* the region specific mailbox attaching the spreadsheet with your responses recorded. You must respond by **February 19, 2025** with the information requested. Nonresponse may result in the termination of your awards.

## Frequently Asked Questions

**Q1: In what scenarios can a grantee get approved for an extension to this deadline?**

9-13

Extensions could be granted if you have an extenuating circumstance such as scheduled leave or your internal process for approval from authorizing representative takes longer than the timeline allows. Please reach out to your Regional Office Staff to request an extension.

**Q2: How much can a grantee change the application and program model to come into compliance?**

Grantees are encouraged to make all necessary changes to come into compliance so long as the changes align with the funding notice. This may require changing staff roles and activities, member or volunteer roles and activities, trainings, service sites, performance measures, and any other components of a program that may conflict with the executive orders.

**Q3: The letter shared language that needed clarification. If I've reviewed the specified language in the context of my application, and it complies with executive orders, do I need to remove the language?**

No, if your review assessed that your application, as is, complies with the executive orders, no changes are needed, and your organization can self-certify.

**Q5: Can our Portfolio Manager or Regional Staff review our narratives before we submit an amendment?**

Due to the short timeline, regional office staff will have limited capacity to respond to individual requests and will not be able to review individual grant narratives before the **February 19** deadline. Grantees are responsible for ensuring that their application and program complies with President Trump's executive orders.

**Q6: If I choose to relinquish, can I finish the grant year?**

Only if you can certify that your program complies with executive orders, or you amend your grant to be fully compliant within the timeline provided.

**Q7: (ASN and VISTA) Am I able to transfer members to other operating sites or programs with available MSYs should my amendment require removing specific member activities?**

Yes., please contact your Regional Office staff for guidance on this process.

**Q8. Can I initiate multiple amendment types at the same time?**

Yes. You may select more than one type when initiating an amendment. You cannot have two amendments open at the same time.

**Q9. Can we change the number of MSY, VSY, or volunteers associated with this application?**

ASN grantees: Grantees are encouraged to fully enroll all MSY they have been awarded. It is allowable to enroll fewer members if necessary to comply with the administration's executive orders.

9-14





ACS grantees: Grantees may reduce VSY for positions that are deemed as non-compliant due to the administration's executive orders. Volunteer positions not included in performance measures and volunteers engaged in Other Community Priority performance measure who are engaged in non-compliant activities must also stop. VSY reduction for any other reason is not allowed. A reduction in VSY requires budget revisions.

**Q10. If I relinquish my grant, can my members be exited for compelling personal circumstances?**

Yes. For ASN grantees, if you relinquish your grant, your members may be exited for compelling personal circumstances. Per CFR 45 CFR 2522.230(a)(4)(C), members may be released from completing a term of service for . . . "Conditions attributable to the program or otherwise unforeseeable and beyond the participant's control, such as a natural disaster, a strike, relocation of a spouse, **or the nonrenewal or premature closing of a project or program**, that make completing a term unreasonably difficult or impossible;" You must document the reason for the members compelling personal circumstances exit, including that the member could not be placed in another program.

For VISTA sponsors, please contact your Portfolio Manager regarding any members that may need to exit the project early.

## Appendix

### **What is an Executive Order?**

The President of the United States manages the operations of the Executive branch of government through executive orders and memoranda. Executive orders and memoranda are written directives, signed by the president, that order the government to take specific actions to ensure "the laws be faithfully executed."

Information about presidential actions, including executive orders is available on the [White House website](#).

### **What part of my AmeriCorps grant must comply with Executive Orders?**

AmeriCorps, as part of the Executive branch of government, must comply with all applicable executive orders and memoranda. No AmeriCorps funding may be spent on any activity not compliant with the executive orders and memoranda.

All aspects of AmeriCorps grants/awards must comply with President Trump's executive orders, including, but not limited to:

- Grant applications for AmeriCorps resources
- Activities performed by AmeriCorps members/volunteers
- Training provided to members/volunteers

9-15



- Program materials, such as volunteer/member applications, enrollment forms, service opportunity listings, and handbooks
- Social media and website posts about your AmeriCorps award

Grantees/sponsors must also ensure all sub applicants/volunteer stations/operating sites/host sites are compliant with executive orders through their memorandum of understanding and subsite monitoring.

### **Which Executive Orders must I comply with?**

AmeriCorps Grantee/Sponsors awards must comply with all executive orders, including but not limited to:

- [Defending Women From Gender Ideology Extremism And Restoring Biological Truth To The Federal Government - The White House](#)

#### **Per the Trump-Vance Administration:**

- *It is the policy of the United States to recognize two sexes, male and female.*
- *"Sex" shall refer to an individual's immutable biological classification as either male or female. "Sex" is not a synonym for and does not include the concept of "gender identity."*
- *When administering or enforcing sex-based distinctions, every agency and all Federal employees acting in an official capacity on behalf of their agency shall use the term "sex" and not "gender" in all applicable Federal policies and documents.*
- *Federal funds shall not be used to promote gender ideology. Each agency shall assess grant conditions and grantee preferences and ensure grant funds do not promote gender ideology.*
- [Ending Radical And Wasteful Government DEI Programs And Preferencing - The White House](#)

#### **Per the Trump-Vance Administration:**

- *(i) terminate, to the maximum extent allowed by law, all DEI, DEIA, and "environmental justice" offices and positions (including but not limited to "Chief Diversity Officer" positions); all "equity action plans," "equity" actions, initiatives, or programs, "equity-related" grants or contracts; and all DEI or DEIA performance requirements for employees, contractors, or grantees.*
- [Ending Illegal Discrimination And Restoring Merit-Based Opportunity - The White House](#)

#### **Per the Trump-Vance Administration:**

9-16



- *(iv) The head of each agency shall include in every contract or grant award:  
(A) A term requiring the contractual counterparty or grant recipient to agree that its compliance in all respects with all applicable Federal anti-discrimination laws is material to the government's payment decisions for purposes of section 3729(b)(4) of title 31, United States Code; and  
(B) A term requiring such counterparty or recipient to certify that it does not operate any programs promoting DEI that violate any applicable Federal anti-discrimination laws.*
- [Unleashing American Energy - The White House](#)

**Per the Trump-Vance Administration:**

- *(b) All activities, programs, and operations associated with the American Climate Corps, including actions taken by any agency shall be terminated immediately.*

**Are federally recognized Tribes subject to the executive orders?**

Yes, the executive orders generally apply to federally recognized Tribes; however, the unique legal and political relationship that federally recognized Tribes have with the United States may impact how executive orders related to diversity, equity, and inclusion (DEI) apply. Grants serving Tribal members may have been mischaracterized in the application description as promoting DEI. If you are a Tribal grantee or are serving Tribal members and have additional questions, please reach out to: [nativeamericanaffairs@americorps.gov](mailto:nativeamericanaffairs@americorps.gov) and cc your portfolio manager.

9-17







AREA AGENCY ON AGING  
San Benito & Santa Cruz Counties

FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM  
Monterey, San Benito, Santa Clara & Santa Cruz Counties

PROJECT SCOUT  
Tax Counseling Assistance

FALLS PREVENTION PROGRAM  
Emergency Response Systems, Assessments & Training

## PROJECT SCOUT

### End of January 2025 Report

Project SCOUT provides free tax-related assistance and preparation for those with simple tax situations and below the \$67,000 in Santa Cruz and San Benito Counties. Project SCOUT also assists seniors with CalFresh, California's version of the Supplemental Nutrition Assistance Program (SNAP), which we tie to our tax preparation service, being our most successful tool in signing up qualifying seniors.

During the month of January, Project SCOUT's focus has been to certify **118 possible volunteers!** Each volunteer certified equates to more taxpayers being helped. The process of getting volunteers certified, primarily new volunteers, is very time consuming, but one very much worth taking. Whether phone assistance, translating, greeter at a site, or tax preparer, every single volunteer makes a difference and allows us to provide such a poverty-fighting service for so many. As of the end of January, **40 volunteers have certified** and are ready to start helping the communities of Santa Cruz and San Benito Counties!

We have secured **15 weekly sites for 2025 tax season**, covering most areas of Santa Cruz County. This year we have added services at the Felton Public Library as well as the Aptos Public Library. Project SCOUT will also be having various special events such as on Friday February 28th at the Pauline Valdivia Memorial Community Center, marketed as "Tacos & Taxes" and we expect to assist anywhere from 75 to 100 people that day alone! Taxpayers will be able to do their taxes, get a tasty meal, get information on community resources, and possibly earn prizes! On its 2nd year running, this is an event where community partners can participate and provide information on the services that they provide to the senior and/or low income communities we service.

10.1-1

## 2025 Tax Sites

- 1-ALL: Project SCOUT Tax Facilitated Self Assistance ONLINE <http://tinyurl.com/SCOUTFSA>
- 2-Project SCOUT VITA (Ad hoc, remote, special events)
- 3-Project SCOUT TCE (Ad hoc, remote, in-home for seniors and disabled)
- 4-Highlands Park Senior Center (Ben Lomond, site takes appointments)
- 5-Felton Public Library, (shared appointment calendar)
- 6-Santa Cruz Downtown Public Library, (shared appointment calendar)
- 7-London Nelson Community Center (Santa Cruz, shared appointment calendar)
- 8-Market Street Senior Center (Santa Cruz, first come, first served)
- 9-Mid-County Senior Center (Capitola, site takes appointments)
- 10-Capitola Public Library (shared appointment calendar)
- 11-Aptos Public Library (shared appointment calendar)
- 12-La Manzanita Community Resource Center (Watsonville, shared appointment calendar)
- 13-Watsonville Senior Center (first come, first served)
- 14-Watsonville Public Library (first come, first served)
- 15-Pauline Valdivia Memorial Community Center (Hollister, shared appointment calendar)

Appointments are taken by calling **831-724-2606** or emailing [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org), or calling or walking in to those sites that take appointments. Ad hoc sites such as our "Tacos & Taxes" event on February 28th in Hollister, or services at senior living sites, will be by appointment at site, by contacting Project SCOUT, and by walk-in.

(Please see attached flyers).

10.1-2



# Project Scout FREE TAX PREP

*By appointment only*

## OUR SERVICE

Free tax assistance for those with reportable income of \$67,000 or less; simple tax returns only. To schedule an appointment with one of our tax prep volunteers, call 831-724-2606 or email [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org). Please leave a message with your full name, phone number, age, city or town where you live, and what forms or sources of income you need to report in your taxes. You will be contacted for an appointment.

\*\*We will not prepare married filing separate, rental income, net losses, expenses of \$35,000 or more, some K-1s with other income, deductions, and credits, plus others.

## DIY SERVICE

Facilitated Self-Assistance Option. Do your taxes for free by using our free link: [www.tinyurl.com/SCOUTFSA](http://www.tinyurl.com/SCOUTFSA)

## REQUIREMENTS

The Following are mandatory for your Tax Preparation Appointment:

- ✓ Intake Sheet (provided by Project SCOUT) to make sure nothing is missed with your taxes
- ✓ Social Security Card, 1099-SSA (if receiving Social Security Income), or ITIN (if no social security number) provided by IRS
- ✓ Valid picture ID, such as driver's license or passport
- ✓ Most recently completed tax return
- ✓ W-2 forms that report employment income
- ✓ 1099 forms reporting other sources of income
- ✓ Detailed itemized self-employment expenses for the year for those self-employed
- ✓ Detailed itemized medical, taxes paid on property or big purchases, and donations (if itemizing on taxes)
- ✓ 1098 Payments or other contributions made
- ✓ Form 1095 A,B, or C reporting your health insurance coverage

*Thank you to our partners & sponsors!*



## PROJECT SCOUT

*A program of the Seniors Council of Santa Cruz and San Benito Counties*

<https://seniorscouncil.org/project-scout>

## CONTACT US

*For appointment services:*

10.1-3 Call: 831-724-2606

email: [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org)



# Project Scout PREPARACIÓN DE IMPUESTOS GRATUITA

*Solo con cita*

## NUESTRO SERVICIO

Asistencia fiscal gratuita para quienes tengan ingresos declarables de \$67,000 dólares o menos. Declaraciones de impuestos simples solamente. Para hacer una cita con nuestros voluntarios, llame al 831-724-2606 o envíe un correo electrónico a [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org). Por favor deje un mensaje con su nombre, edad, número de teléfono y sus tipos de ingreso. Nos contactaremos con usted para programar una cita.

\*\*No prepararemos declaraciones de casados por separado, ingresos por alquiler, pérdidas netas, costos de \$35,000 o más, algunos K-1 con otros ingresos, deducciones y créditos, mas otros.

## AUTOSERVICIO DE IMPUESTOS

Opción autoasistida facilitada. Haga sus propios impuestos de forma gratuita en: [www.tinyurl.com/SCOUTFSA](http://www.tinyurl.com/SCOUTFSA)

## REQUISITOS

LOS SIGUIENTES DOCUMENTOS SON OBLIGATORIOS PARA SU NOMBRAMIENTO:

- Hoja de ingreso (proporcionada por el Proyecto SCOUT) para que sepamos lo que piensa declarar en sus impuestos
- Tarjeta de la Seguridad Social, 1099-SSA (si recibe ingresos de la Seguridad Social), o ITIN (si no tiene Tarjeta de la Seguridad Social) proporcionado por el IRS
- Identificación con su foto, como licencia de conducir o pasaporte
- Formularios W-2 que informan sobre ingresos laborales
- Declaración de impuestos más reciente
- Formularios 1099 reportando otras fuentes de ingresos
- Lista detallada de los gastos itemizados incurridos durante el año para los autoempleados
- Lista de gastos itemizados medicos, propiedad, impuestos en compras grandes y donaciones (para los que itemizan)
- Formulario 1098 Pagos u otras contribuciones realizadas.
- Formulario 1095-A, B o C que informa de su cobertura de seguro médico.

10.1-4

*¡Gracias a nuestros patrocinadores y socios!*



## PROJECT SCOUT

*Un programa del Consejo de Mayores de  
los Condados de Santa Cruz y San Benito*

<https://seniorscouncil.org/project-scout>

## CONTACTENOS

*Para programar una cita:*

Llamar: 831-724-2606

email: [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org)





# TACOS & TAXES

*It's tax time!*  
*File your taxes and enjoy delicious tacos - for free!*

## EVENT DETAILS

- February 28, 2025: 1PM to 4PM
- Pauline Valdivia Community Center, 300 West St, Hollister, CA 95023
- Co-Hosted by Project SCOUT, Golden State Opportunity, State Assembly Speaker Robert Rivas, and Pauline Valdivia Community Center

## ELIGIBILITY REQUIREMENTS

- ✓ Individuals with income under \$67,000
- ✓ Basic returns only



## MAKE AN APPOINTMENT

Call (831) 637-9275 or (831) 724-2606



## PROJECT SCOUT

*A program of the Seniors Council of  
Santa Cruz and San Benito Counties*  
<https://seniorscouncil.org/project-scout>

## CONTACT US

10.1-5 *For appointment services:*

Call: 831-724-2606  
email: [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org)



# TACOS y TAXES

*Es tiempo de impuestos.  
Te invitamos a comer tacos mientras te ayudan a  
preparar tus impuestos. Todo es gratis!*

## DETALLES DEL EVENTO

- 28 de febrero de 2025: 1 pm a 4 pm
- Pauline Valdivia Community Center, 300 West St, Hollister, CA 95023
- Nuestros sponsors son Project SCOUT, Golden State Opportunity, State Assembly Speaker Robert Rivas y Pauline Valdivia Community Center

## REQUISITOS DE ELEGIBILIDAD

- ✓ Personas con ingresos menos de \$67,000
- ✓ Solo devoluciones básicas



## HACER UNA CITA

Llame al (831) 637-9275 o (831) 724-2606



10.1-6



## PROJECT SCOUT

*Un programa del Consejo de Mayores de  
los Condados de Santa Cruz y San Benito*  
<https://seniorscouncil.org/project-scout>

## CONTACTENOS

*Para programar una cita:*

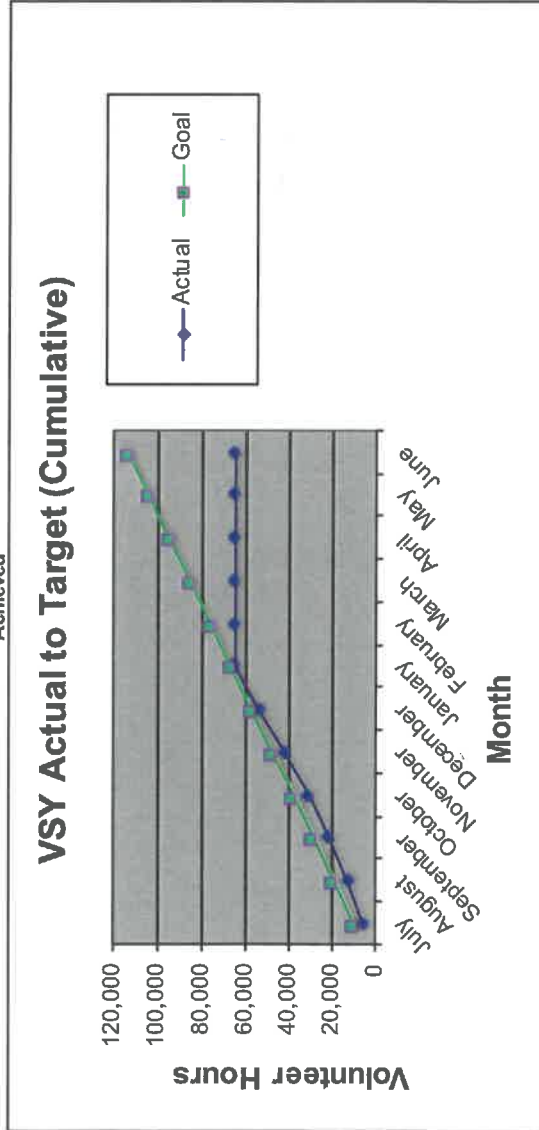
Llamar: 831-724-2606

email: [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org)

**Project Name: Seniors Council Foster Grandparent Program**  
**Grant Year: 7/1/24- 6/30/25**

Month	Cumulative Hours		Monthly VSY		Monthly Hours		Monthly Vols.		FY 23-24 Actuals	Annual VSY Goal
	Actual	Goal	Actual	Goal	Actual	Goal	Active			
July	5,316	9,483	5.09	9.08	5,316	9,483	124	4,976	109	
August	12,312	18,966	6.70	9.08	6,996	12,312	120	5,585	109	
September	21,105	28,449	8.42	9.08	8,793	21,105	118	6,893	109	
October	30,539	37,932	9.04	9.08	9,434	30,539	116	7,363	109	
November	41,484	47,415	10.48	9.08	10,945	41,484	115	10,355	109	
December	53,749	56,898	11.75	9.08	12,266	53,749	116	12,862	109	
January	64,472	66,381	10.27	9.08	10,723	64,472	117	10,827	109	
February	64,472	75,864	0.00	9.08		64,472		7,179	109	
March	64,472	85,347	0.00	9.08		64,472		10,382	109	
April	64,472	94,830	0.00	9.08		64,472		10,621	109	
May	64,472	104,313	0.00	9.08		64,472		8,487	109	
June	64,472	113,796	0.00	9.08		64,472		5,739	109	
<b>TOTAL</b>			<b>61.75</b>		<b>64,472</b>			<b>101,267</b>		

Total VSYS Achieved

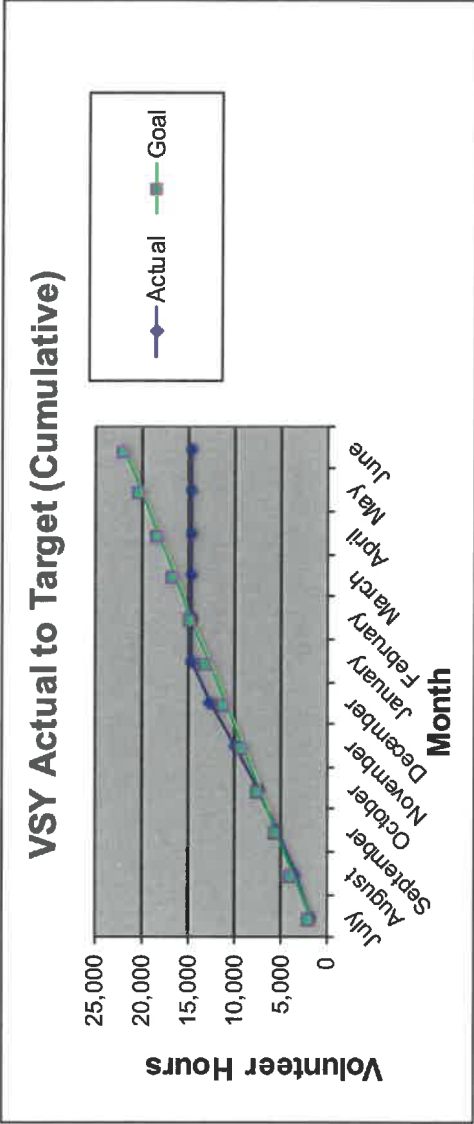


2-2-201

**Project Name: Seniors Council Senior Companion Program**  
**Grant Year: 7/1/24- 6/30/25**

Month	Cumulative Hours		Monthly VSY		Monthly Hours		Monthly Vols.		Annual VSY	
	Actual	Goal	Actual	Goal	Actual	Goal	Active	Goal	Actuals	Goal
July	1,837	1,827	1.76	1.75	1,837	1,837	29	21	1,540	21
August	3,444	3,654	1.54	1.75	1,608	1,608	29	21	1,312	21
September	5,353	5,481	1.83	1.75	1,909	1,909	29	21	1,640	21
October	7,408	7,308	1.97	1.75	2,055	2,055	31	21	1,691	21
November	9,911	9,135	2.40	1.75	2,504	2,504	31	21	2,498	21
December	12,525	10,962	2.50	1.75	2,614	2,614	30	21	3,189	21
January	14,684	12,789	2.07	1.75	2,159	2,159	30	21	2,485	21
February	14,684	14,616	0.00	1.75				21	1,802	21
March	14,684	16,443	0.00	1.75				21	2,516	21
April	14,684	18,270	0.00	1.75				21	2,522	21
May	14,684	20,097	0.00	1.75				21	1,940	21
June	14,684	21,924	0.00	1.75				21	1,787	21
<b>TOTAL</b>			<b>14.06</b>		<b>14,684</b>				<b>24,921</b>	

Total VSYS Achieved





## ADRC of San Benito County Staff Report - February 2025

ADRC Staff are wrapping up a very successful Network partnership effort to distribute 400+ Emergency Preparedness backpacks to older adults and individuals living with disability in San Benito County. The backpacks, purchased by Seniors Council/AAA utilizing Older Californians Act Modernization funding, contain essential emergency support items to sustain an individual for up to four days, in the event of a natural disaster or other emergency, which could delay or impede first responders and their efforts to maintain community safety and minimize the potential for loss of life. In San Benito County, the Network was able to enlist the help of both Core and Extended Partners, in an effort to distribute the backpacks to those most vulnerable, but also to individuals - - like Veterans and even those struggling to maintain stable housing - - who we are sometimes challenged to reach and engage. The backpacks were very well received, and also provided Network partners an opportunity to check-in with consumers, make new connections, and even share additional information, such as the Emergency Preparedness Tip Sheet found in the local San Benito County Aging and Disability Resources Directory. Congratulations and a very big THANK YOU to everyone who assisted in the effort, and thanks to Zach Johnson at Seniors Council/AAA for his work in bringing this effort to fruition.

ADRC Staff continue to attend monthly Technical Support Office Hour sessions for the Local Aging & Disability Action Planning (LADAP) Grant Program. As a LADAP Grantee, Seniors Council in working with local partners to begin the process of developing a Local Playbook as part of the Governor's Master Plan for Aging (MPA). Additionally, and as a part of the Master Plan on Aging and supporting LADAP grant work, Seniors Council, the Community Foundation for San Benito County, and a host of other community members and organizations continue their Solution Summit follow-up work with the convening of workgroups focused on prioritizing local activities and actions to create solutions for locally identified aging, disability, and caregiver needs. If you'd like to contribute to this important work, please contact Corey Shaffer at 831-688-0400 x131, or [coreys@seniorscouncil.org](mailto:coreys@seniorscouncil.org).

As noted in previous reports, the ADRC Network s benefitted by and also a contributor to the development of sustainable local long term services and supports resources to enhance the opportunities that individuals and families have to live and receive supports in the communities in which they reside. Key to this approach is making more services, and more services identified as being essential, available to those for whom a little help can make the difference between continuing to be able to live independently and needing some level of institutional care, often outside of the area. ADRC Staff and Network partners continue to help to address the shared goal of developing more and better local resources to meet the needs of individuals and families - - core to ADRC-NWD community success and improved LTSS outcomes.

An example of such a collaboration has been the shared employee partnership and mutual commitment to growing local resource offerings by Seniors Council and the Community Foundation for San Benito County, in both local MPA-related development work, as well as with San Benito Connect - - the new Senior Volunteer Services and Development portal - - directed at identifying and placing more essential volunteers in positions to serve older adults countywide. Additionally, the site also serves to support older adult engagement and community participation, by providing opportunities for older adults to contribute their energies, skills, and knowhow in meaningful and productive ways.

ADRC Staff continues work on a shared Statewide focus on Veterans and Veteran families' needs for LTSS and community services navigation support. While this population has the support of local Veterans Services Offices, the VA, and CalVet, the thinking is that they may not be receiving the local community-based support which could also benefit them. So, the ADRC Core Services Team also discussed ways to better engage with and screen for Veteran status as a part of our collective intake process, so as to maximize the opportunity to connect consumers to additional services they may be eligible for.

Finally, and as noted briefly earlier in this report, ADRC Staff are working closely with Corey Shaffer on Seniors Council and the Community Foundation of San Benito County's effort to stand up a Senior Volunteer Services and Development program, helping to identify gaps in current services, pinpoint community volunteer needs, and promote the idea that volunteerism is as good for the individual volunteer, as it is for the people and families receiving volunteer support and services. This recognition is truly one of those very special circumstances where everyone in a community benefits when there is a spirit of volunteerism, an active volunteer presence, and there exists the ability to help volunteers and organizations needing volunteer expertise and assistance to come together to serve more community members.

And, as a recap and reminder . . . . The ***San Benito County Connect – Neighbor to Neighbor Volunteer Network*** program website has launched at [www.sbcvolunteers.org](http://www.sbcvolunteers.org), and thanks to tireless work on the part of Corey Shaffer, Seniors Council's co-funded employee, in partnership with the Community Foundation for San Benito County, we already have some local organizations beginning to provide information on volunteer positions in need of being filled. Additionally, Corey and Britt have been working together to develop an outreach and awareness campaign around the new offering - - including the next several months of the back cover of the Mission Village Voice; a 15 second spot at the Hollister Premiere Cinema before the showing of every movie there for the next six months; and even possibly some bus stop shelter signage with San Benito Express and table-top signage at local restaurants. Please be patient as Corey works to build organizational entries and input volunteer opportunities sent her way, but we're hopeful that over the next several months, people will find success in matching with volunteer service opportunities in areas of their interest and choosing. Some funding for Corey's position and the project described has been provided through a partnership with the Community Foundation for San Benito County, the California Department of Aging, and Seniors Council.



## SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION

1101 Pacific Avenue, Suite 250, Santa Cruz, CA 95060-4418 • (831)460-3200 • info@scrtc.org

February 13, 2025

Santa Cruz Metropolitan Transit District  
ATN Michael Bois and Rina Solorio  
Cc: Corey Aldridge and Metro Board of Directors  
110 Vernon ST  
Santa Cruz, CA 95060

Re: ParaCruz Eligibility Requirements

Dear Mr. Bois and Ms. Solorio,

The Elderly & Disabled Transportation Advisory Committee (E&D TAC) advises the Santa Cruz County Regional Transportation Commission (RTC), the Santa Cruz Metropolitan Transit District (Metro), and other service providers on transportation needs for people with disabilities, seniors and persons with limited means.

It has come to the committee's attention that Santa Cruz Metro has contracted ParaCruz eligibility applications to an outside vendor, ADA Ride, rather than performing this task in house. As one of your advisory bodies, the committee would have appreciated receiving a presentation and an update about this change prior to its implementation. We would have had the opportunity to offer suggestions which could have addressed a smooth transition for ParaCruz customers, to assist Metro in giving direction to ADA Ride for appropriate eligibility criteria, to become informed as to the ramifications for current customers as a result of changing eligibility requirements, and to assist with public outreach and notification of the upcoming changes.

In order for this committee to adequately perform its advisory function, ongoing and thorough communication is both vital and beneficial to the community we serve. To that end, the E&D TAC would like to receive a presentation from you at our meeting on March 4, 2025 regarding the new ParaCruz eligibility process.

Items of interest include:

- Reasons for using an outside vendor
- Why this change was not brought to the E&D TAC prior to implementation
- How current ParaCruz riders were notified of the change
- Status of service while customer is reapplying
- How Metro can work with ADA Ride to adapt eligibility criteria to conform with previous eligibility requirements
- How Metro will monitor and evaluate the success of the contract

As ADA paratransit service is so critical in allowing county residents living with disabilities to travel safely and independently, the committee looks forward to working with you to ensure fairness, affordability and access to the community in which they live. Its members welcome the

11.1-1

update, exchange of ideas and additional guidance which could result from a presentation at the March 4 meeting.

Please respond to the E&D TAC staff, Amanda Marino [amarino@sccrtc.org](mailto:amarino@sccrtc.org) by February 20, 2025.

Thank you for your prompt attention to this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Veronica Elsea".

Veronica Elsea, Chair  
Elderly and Disabled Transportation Advisory Committee  
[veronica@laurelcreekmusic.com](mailto:veronica@laurelcreekmusic.com)

U.1-2





**AREA AGENCY**  
San Benito

**FOSTER GRANDPARENT/SENIOR CENTER**  
Monterey, San Benito, Santa Cruz

**PROJECT SCOUT**  
Tax Counseling Assistance

**AGING & DISABILITY RESOURCES**  
Navigating the San Benito County Services

## GLOSSARY

### **A GUIDE TO THE "ALPHABET SOUP" OF SENIOR PROGRAMS** Updated August 2022

**AAA AREA AGENCY ON AGING**

The designated conduit for federal and state monies to local senior programs, administratively responsible for service provision and program operation. Charged with assessing local needs, planning, and coordination of services. There are 33 Area Agencies on Aging in California, approximately 670 in the U.S. (Usually referred to as the "Triple A")

**AARP AMERICAN ASSOCIATION OF RETIRED PERSONS**

The largest membership association in the world, AARP publishes the magazine Modern Maturity, operates a safe driving program and is a national contractor for the Older Americans Act Title V employment program. The Santa Cruz Chapter of AARP was dissolved in early 2005, by a vote of its members. The controversy leading to this dissolution involved a debate over using the AARP name in advocacy issues without approval by the AARP State office.

**ACA AFFORDABLE CARE ACT**

A federal statute signed into law in March 2010 as a part of the healthcare reform agenda of the Obama administration. Signed under the title of The Patient Protection and Affordable Care Act, the law included multiple provisions that would take effect over a matter of years, including the expansion of Medicaid eligibility, the establishment of health insurance exchanges and prohibiting health insurers from denying coverage due to pre-existing conditions.

**ACL ADMINISTRATION FOR COMMUNITY LIVING**

A new branch of the federal Health and Human Services Administration that combines the former Administration on Aging, the Administration on Intellectual and Developmental Disabilities, and the HHS Office on Disability to serve as the Federal agency responsible for increasing access to community supports, while focusing attention and resources on the unique needs of older Americans and people with disabilities across the lifespan.

**ADA AMERICANS WITH DISABILITIES ACT**

Federal legislation passed in 1990 which sets accessibility, employment and other standards for people with disabilities. Because many seniors experience mobility or other physical limitations, ADA issues are often relevant to older people.

**ADCRC ALZHEIMER'S DAY CARE AND RESOURCE CENTER**

Funded by the state, a limited number of these centers exist, one operated by Jovenes de Antaño in Hollister, offering social, recreational and rehabilitative services for people with dementia and respite to their caregivers.

**ADHC ADULT DAY HEALTH CARE**

Licensed centers providing rehabilitation and social activities, eligible to receive Medicaid reimbursement, and often serving Alzheimer's patients. In Santa Cruz County, Elderday is the only ADHC center. San Benito County has no such center, although the Alzheimer's Center provides similar services to eligible people. California Budget cuts in 2011 resulted in ADHC being eliminated as a Medi-Cal reimbursable service, and replaced by Community Based Adult Services, or "CBAS".

**ADRC AGING AND DISABILITY RESOURCE CENTER**

Aging and Disability Resource Centers are the vision of a collaborative effort of AoA and the Centers for Medicare & Medicaid Services (CMS) to streamline access to long-term care. The ADRC program model provides an opportunity to effectively integrate the full range of long-term supports and services into a single, coordinated system. By simplifying access to long-term care systems, ADRCs and other single point of entry (SEP) systems are serving as the cornerstone for long-term care reform in many states.

**AAA ADVISORY COUNCIL**

The Seniors Council Board of Directors receives recommendations from several Advisory Councils. One body is mandated by the Older Americans Act to assure senior participation in the AAA process. The second body mandated by the federal Domestic Volunteer Act to exist within the structure of the agency sponsoring the FGP or SCP to assure community and program participant involvement in program operations. A AAA Advisory Council is especially important where the AAA is part of local government, often with the Board of Supervisors as the governing board. In the case of the Seniors Council, the roles are reversed, with the Board of Directors being the grassroots representative group and the Advisory Council composed two-thirds of government representatives.

**AGING NETWORK**

The informal group of agencies, organizations, programs, institutions and key individuals providing services and assistance to, and advocacy on behalf of, the older population.

**ALTTC** AGING and LONG TERM CARE COMMISSION

A San Benito County Commission designed to address community-wide issues related to aging and long term care. The Seniors Council Executive Director is a voting member of this commission.

**AoA** ADMINISTRATION ON AGING

The federal agency (a branch of the Health and Human Services Administration) which oversees programs implemented under the Older Americans Act. California is in AoA Region IX, headquartered in San Francisco. AoA is now part of ACL.

**APS** ADULT PROTECTIVE SERVICES

Mandated state- and locally-funded programs, operated by the "welfare departments" in both counties, to protect the safety and wellbeing of older people.

**AREA PLAN**

The document, required by The Older Americans Act, which describes the local area, the local AAA, and the needs of older persons in the area, and which spells out programs and specific service objectives planned to meet those needs.

**ASA** AMERICAN SOCIETY ON AGING

A nationwide organization (formerly the Western Gerontological Society) which consists primarily of professionals in the field of aging. ASA sponsors many classes, workshops and training conferences.

**AWAS** ASSOCIATION OF WATSONVILLE AREA SENIORS

The group of Watsonville seniors who incorporated in order to operate the Watsonville Senior Center at 114 East Fifth Street. Community Bridges operates a congregate dining center at the AWAS site; Senior Network Services has an office there; and Project SCOUT is headquartered at the Fifth Street Center.

**BLOCK GRANTS**

The process undertaken by federal or state government to remove categorical designations or restrictions and instead provide a lump sum to an area in an effort to decentralize and to increase local control. Usually a transition to block grants involves a reduction in the total amount, based on the supposition that the bureaucracy will be reduced.

**BOARD OF DIRECTORS**

The governing body of an agency. The Seniors Council's Board of Directors is the legal grantee for federal, state and local funds, and is legally responsible and liable for program operations. This body sets official policy and makes formal agency decisions, as well as hiring and supervising the Executive Director to carry out those policies and decisions.

**BUDGET DISPLAY**

The official document sent to the AAA by CDA informing the agency of the amount of money it can expect to receive for the fiscal period, and the specific categorical breakdown of those federal and state funds. A Planning Estimate, which looks like a Budget Display, is sent several months prior to the start of the state fiscal year. The actual Budget Display is sent out after the state budget has been signed. It is amended from time to time during the fiscal year, in response to financial changes, on Budget Display Amendments 1, 2, 3, etc.

**CAB COMMUNITY ACTION BOARD**

The local provider of services to low-income people under federal mandate and using federal seed funding to leverage other funds. Also known as the Community Action Agency. There is a non-profit CAB in Santa Cruz County and one in San Benito County. The Santa Cruz County CAB holds a small contract with the AAA to provide Senior Information & Assistance services and Transportation to people through the Davenport Resource Service Center.

**CAHF CALIFORNIA ASSOCIATION OF HEALTH FACILITIES**

A statewide organization representing owners and administrators of nursing homes.

**CAHA CALIFORNIA ASSOCIATION OF HOMES FOR THE AGED**

An organization representing operators of various types of senior housing. CAHA publishes an excellent newsletter.

**CAIRS CALIFORNIA ASSOCIATION OF INFORMATION AND REFERRAL SERVICES**

The statewide organization of Senior Information and Assistance service provider programs, such as Senior Network Services and Jovenes de Antaño.

**CalACT CALIFORNIA ASSOCIATION for COORDINATED TRANSPORTATION**

The statewide organization of local senior transportation and paratransit operators.

**CLTCOA CALIFORNIA LONG TERM CARE OMBUDSMAN ASSOCIATION**

The statewide organization of local Ombudsman programs.

**CAN CALIFORNIA ASSOCIATION OF NONPROFITS**

A statewide organization whose membership is open to all non-profit organizations, CAN began in Santa Cruz more than a decade ago with the purpose of sharing information and obtaining benefits available to large groups but previously not available to small individual nonprofits.

**CANDE CALIFORNIA ASSOCIATION OF NUTRITION DIRECTORS FOR THE ELDERLY**

11.2-4

The statewide organization of local senior nutrition programs. Due to funding and operational challenges, CANDE has been defunct since about 2011. See MOWCA.

**CARCH** CALIFORNIA ASSOCIATION OF RESIDENTIAL CARE HOMES

The organization consisting of people who operate licensed residential care homes.

**CBAS** COMMUNITY BASED ADULT SERVICES

CBAS is the name of the program designed to replace ADHCs, as part of recent state legislation intended to reduce spending on programs for older adults. CBAS regulations require virtually the same services previously provided by ADHC's, but it narrows the definition of who is eligible to receive such services, creates new procedures for determining such eligibility, and decreases funding options for operators of CBAS programs.

**CBLTC** COMMUNITY-BASED LONG TERM CARE

The concept of a full spectrum of community resources designed to enable older and functionally-impaired people to remain outside institutional settings as long as is possible and appropriate.

**CBO's** COMMUNITY BASED ORGANIZATIONS

Generally, non-profit agencies that are involved in the delivery of services to the members of our local community. All agencies of the HCA are CBO's.

**CBSP** COMMUNITY BASED SERVICE PROGRAMS

State funded programs contracted and monitored by the AAA. General Fund programs under CBSP include Alzheimers Day Care Resource Centers, Brown Bag, Foster Grandparent, Linkages, Respite Purchase of Services, Respite Registry, Senior Companion, and HICAP.

**CBSC** COMMUNITY-BASED SYSTEM OF CARE

[See Community-Based Long Term Care.]

**CAAH** CENTRAL CALIFORNIA ALLIANCE FOR HEALTH

The Alliance is a locally governed non-profit health plan that serves over 236,000 members in Santa Cruz, Monterey and Merced counties. CCAH is a publicly operated regional plan using the State's preferred County Organized Health System (COHS) model of Medi-Cal managed care.

**CCI** COORDINATED CARE INITIATIVE (California)

The CCI begins the process of integrating the delivery of Medicare and Medi-Cal health care services to people eligible in both programs, called "dual eligible" beneficiaries.

**CCCIL** CENTRAL COAST CENTER FOR INDEPENDENT LIVING

The state-designated Independent Living Center (ILC) providing information, referral, some direct services and active advocacy for people of all ages with physical or other disabilities. (Formerly called Community Resources for the Disabled, or CRD.)

**CCoA** CALIFORNIA COMMISSION ON AGING

This body consists of 25 individuals representing the older population of the state. Members are appointed by the State Legislature and by the Governor to advise them and other state officials on senior issues. The CCoA created and monitors the progress of the Long Range Strategic Plan on Aging, and works closely with other state advocacy groups.

**CDA** CALIFORNIA DEPARTMENT OF AGING

The state body, within the health and Welfare Agency, which administers aging and long term care programs. It is CDA that designates a local body as the Area Agency on Aging. CDA provides most of the funding for the AAA. It provides a portion of the funding for our local Foster Grandparents, and Senior Companions. In our area, CDA also funds the HICAP, the Alzheimer's Center and the Adult Day Health Care and other programs. Interpreting the federal Older Americans Act and Domestic Volunteers Act, and carrying out the Older Californians Act, CDA imposes guidelines and regulations governing AAA, FGP and SCP operations, monitors plans and budgets, and reviews and resolves audits.

**CDBG** COMMUNITY DEVELOPMENT BLOCK GRANT

A source of funding for special projects, awarded on a competitive basis and administered by local governments.

**CFL** COMPANION FOR LIFE

A personal emergency response system program originated in Santa Clara County and established in San Benito and Santa Cruz Counties as an entrepreneurial project to raise funds for the Seniors Council. CFL operated as an independent agency for 20+ years, but it rejoined the Seniors Council in 2015.

**CFR** CODE OF FEDERAL REGULATIONS

The book of federal law setting forth rules by which even a local nonprofit must govern itself if it is using public funds. Since most of the Seniors Council's funding comes either directly or indirectly from the federal government, this agency must adhere to provisions of the CFR.

**CNCS** CORPORATION FOR NATIONAL & COMMUNITY SERVICE

The federal agency that operates Americorps and Senior Corps Programs. CNCS is often called "The domestic Peace Corps". Foster Grandparent programs and Senior Companion programs are part of Senior Corps.

**COG COUNCIL OF GOVERNMENTS**

A generic term which locally is the Council of San Benito County Governments, made up of representatives from the Board of Supervisors and the two City Councils. It serves as the Regional Transportation Planning Agency.

**COMMUNITY BRIDGES**

An umbrella non-profit operating a variety of community-based services under a centralized administration. Community Bridges operates two programs funded by the Area Agency on Aging, Meals on Wheels and Lift Line Transportation. Formerly known as Food & Nutrition Services

**C.O.R.E. COLLECTIVE OF RESULTS AND EVIDENCE-BASED INVESTMENTS**

Santa Cruz County and City's revised allocation process (make up your own acronym) for community program funding. The controversial and evolving shift to require agencies to use evidence-based practices to serve the most vulnerable residents under the goals set by nine local strategic plans is part of a three-year funding cycle initiated in early 2017. While the Area Plan on Aging is included among the selected plans, no plan exists to address poverty or immigration, so, therefore, no goal in C.O.R.E. exists to address those issues or fund organizations that do so.

**CR CONTINUING RESOLUTION**

The mechanism whereby federally-funded programs are able to continue operating even in the absence of an approved federal budget. Typically, a Continuing Resolution carries a program for a short period of time, e.g., from October 1 to mid-December.

**CRC CAREGIVER RESOURCE CENTER (FOR THE BRAIN-IMPAIRED)**

The state-designated agency coordinating service and provision of information for families of caregivers to people with Alzheimer's Disease and other forms of brain impairment which had its onset at age 18 or later. In Monterey, San Benito and Santa Cruz Counties, the Del Mar Caregiver Resource Center is the designated CRC.

**CSAC COUNTY SUPERVISORS ASSOCIATION**

The statewide organization of 58 Boards of Supervisors. Most of the 33 AAAs are operated by county governments, so CSAC often gets involved in aging issues.

**CSL CALIFORNIA SENIOR LEGISLATURE**

A "mock" legislature consisting of 120 volunteers, all 60 years of age or older, elected by their peers within specified geographical districts. The CSL meets in official session for one week in the fall of each year to consider bills addressing senior needs. The bills are prioritized, and priority bills are forwarded to the regular State Legislature, with an excellent history of passage into state law. Our area has one Senior Senator and one Senior Assemblymember.

**CTSA** CONSOLIDATED TRANSPORTATION SERVICE AGENCY

CTSA's exist to coordinate specialized transportation services and make them more efficient. In Santa Cruz County, the CTSA is a division of Community Bridges, most commonly known as Lift Line. In San Benito County, the CTSA is the Council of Governments (COG.)

**C4A** CALIFORNIA ASSOCIATION OF AREA AGENCIES ON AGING

The statewide organization of AAA Executive Directors, which meets regularly to share information and coordinate approaches to situations of mutual concern.

**DEI** DIVERSITY, EQUITY AND INCLUSION

**Diversity** is the differences everyone brings to the table, whether those are someone's race, age, ethnicity, religion, gender, sexual orientation, physical ability or other aspects of social identity.

**Equity** recognizes that inequalities exist—that talent is equally distributed across all communities, but opportunity is not. Equity efforts strive to provide equal opportunities regardless of existing inequalities.

**Inclusion** is convening everyone's voice and creating a culture in which people from all backgrounds feel encouraged to express their ideas and perspectives.

**E&D TAC** ELDERLY AND DISABLED TRANSPORTATION ADVISORY COMMITTEE

The advisory body to the CTSA and also to the Santa Cruz County Transportation Commission on matters of transit and paratransit for seniors and younger people with mobility impairment. Also called the Social Services Transportation Advisory Council, or "STACC". The Seniors Council has held a seat on the E&D Committee since its inception.

**EBP** EVIDENCE BASED PRACTICE

The use of systematic decision-making processes or provision of services which have been shown, through available scientific evidence, to consistently improve measurable client outcomes. Some experts are concerned that a "lockstep adherence" to a set of codified treatments may prevent programs from providing what is most needed by a particular client or group, especially when it deviates from the evidence-based model.

**EITC** EARNED INCOME TAX CREDIT

A tax credit available to families with dependent children. Project SCOUT Volunteers often assist low-income families with the preparation and submission of EITC credits. Many eligible local families fail to apply for their EITC refund.

**EVALUATION (often referred to as Program Monitoring)**

The process through which the Board ensures that programs are carried out according to contract terms. Evaluation aspects include pre-contract assessments, monitoring of



MIS data and expenditure reports, renegotiating of contracted service units, "key informant" and client-based satisfaction surveys. The Seniors Council used to rely on volunteers to conduct much of this activity. The CDA however, found the AAA in need of upgrading their monitoring methods, and the responsibility was returned to staff as part of our Sept. 2000 reorganization.

**ESAP ELDERLY SIMPLIFIED APPLICATION PROJECT**

A simplified and streamlined application process for older adults to use when applying for CalFresh benefit.

**FEMA FEDERAL EMERGENCY MANAGEMENT ADMINISTRATION**

The federal agency providing funds and guidelines for such operations as homeless shelters and food banks, as well as disaster situations. The Seniors Council has had several FEMA grants after local disasters.

**FGP FOSTER GRANDPARENT PROGRAM**

A program operated directly by the Seniors Council. Over 175 low-income seniors volunteer to work 20 hours per week assisting young children, and juveniles with special needs at a variety of educational, social, and health institutions. In return for their work Foster Grandparents receive a non-taxable stipend of \$2.45/hour, receive a meal, and are reimbursed for transportation.

**FG/SCP FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM**

Our Foster Grandparent and Senior Companion Program, spoken of as one entity. This is a direct-service program in Monterey, San Benito, Santa Clara and Santa Cruz Counties, sponsored by the Seniors Council and funded by the federal and state governments, local United Ways, other agencies, and foundations. Over 225 low-income seniors volunteer to work 20 hours per week assisting infants, children, juveniles and frail elders with special needs.

**FSA FAMILY SERVICE ASSOCIATION**

A nonprofit umbrella organization providing counseling and other services in Santa Cruz County. The Seniors Council holds a contract for In-Home Services through the FSA's Senior Outreach Program, and for activities in Residential Care Facilities and Nursing Homes via I-You Ventures.

**FSR FINANCIAL STATUS REPORT**

A quarterly report form submitted to the federal government declaring expenditures to date of funds from all sources in support of the local Foster Grandparent Program. The same format is used by CDA to report expenditures of state and local funds for both the Foster Grandparent and Senior Companion Programs.

**FY FISCAL YEAR**

A 12-month budget period. The Fiscal Year of the overall Seniors Council is July 1 of one year through June 30 of the next year (often called FY 2018-19). The State of California operates on this same fiscal year, but the Federal Government's fiscal year begins on October 1 and concludes on September 30<sup>th</sup> of the following year. The feds will often refer to their 10/1/18-9/30/19 FY as "our 2019 budget".

## **GENERAL FUND**

The state funds used to meet the required match to federal Older Americans Act funding and to augment federal money in order to provide additional services. These funds are discretionary.

## **HCA HUMAN CARE ALLIANCE**

In Santa Cruz County, the coalition of human service provider agencies which evolved in 1985 in a united front toward assuring continued local government financial support, and ensuring maximum coordination of services. The Seniors Council is a 30+-year member of the HCA. The Executive Director of the Seniors Council was president of the HCA from October 1999 to October 2001. HCA employed its first staff/director in 2001, and the HCA office was located at the Seniors Council until Jan 2005.

## **HHS HEALTH AND HUMAN SERVICES AGENCY**

The agency of the federal government which administers a wide variety of funds for health and other service programs, including the Administration on Aging which implements the Older Americans Act.

## **HICAP HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM**

The statewide program, funded under the Department of Insurance but administered by CDA, which provides counseling, advocacy and claims assistance to Medicare recipients. Operated in San Benito and Santa Cruz Counties by Senior Network Services.

## **HSA HEALTH SERVICES AGENCY**

The branch of Santa Cruz County government which administers a variety of Public Health programs for low-income county residents.

## **HSD HUMAN SERVICES DIVISION**

The branch of Santa Cruz County government which administers a variety of programs benefiting seniors, children and families, including APS, IHSS, the Public Guardian and others. The previous HSD Director (Cecilia Espinola) completed her Masters' internship with the Seniors Council. Previously known as HRA, or Human Resources Agency.

## **I&A INFORMATION AND ASSISTANCE**

The federal terminology applied to a National Priority service under the Older Americans Act [previously known as "Information and Referral."] The premise is that

even the broadest array of senior services is worthless if seniors and their families and caregivers are not aware of them. Further, for many older people the mere existence of services is meaningless without someone to help them make use of those services.

**I&R INFORMATION AND REFERRAL**

The previous designation for I&A. Information consists of names, addresses, telephone numbers, or explanations of benefits, while Referral consists of actually linking the client to the service by making the appointment, etc.

**ICF INTERMEDIATE CARE FACILITY**

A less intensive level of licensed nursing home care than skilled nursing.

**IFF INTRASTATE FUNDING FORMULA**

The formula adopted by the State Legislature and implemented by CDA to disburse federal and state funds among the 33 AAAs. Over the years, the California formula has been the subject of much scrutiny and controversy, especially as it concerns "inequities" such as the "disproportionately high" amount of funding received by PSA 13. In 1992 a lawsuit was filed by two AAAs and related organizations to force CDA to use a different formula. The Seniors Council, Jovenes de Antaño, and several local seniors -- represented by Senior Citizens Legal Services -- successfully defended existing state law, preventing an enormous local loss of funding for senior programs.

**IHSS IN-HOME SUPPORTIVE SERVICES**

Services provided in the home to help low-income older people and younger functionally-impaired people remain out of institutions.

**ILC INDEPENDENT LIVING CENTER**

The agency designated by the state to serve the special needs and interests of people with disabilities in a service region. In the tri-county area, CCCIL is the designated ILC.

**IN-KIND**

Services (i.e., volunteered time,) equipment, labor, office space, etc., donated to the Seniors Council or its contracted programs. In-kind is a valuable source of Local Match making the agency or program eligible to receive federal funds. In-kind donations are given a "fair market value" and are worth that amount as if it had been cash. In-kind contributions must meet the same audit tests as are applied to cash expenditures: they must be fully documented and must move the agency or program toward accomplishing its approved goals.

**IN-KIND PROGRAM (also called Tri-County In-Kind Program)**

A past program of the Seniors Council established in 2005 (and closed in 2016) which collected (and sometimes purchased) large quantities of dry goods to be redistributed to other non-profits along the Central Coast. Agencies paid an annual fee to participate, and were provided access to goods at a price of 5-15% of their traditional Seniors Council Acronym Dictionary

price. Goods were collected from National surplus shipments as well as products returned to local stores such as Bed, Bath, & Beyond.

### **LOCAL MATCH**

The designated amount of money or in-kind contribution which the agency or program must solicit and document in order to be eligible for federal funds. Direct service providers must document at least 10% Local Match on the total allocation of most Older Americans Act funding (Title III E – Family Caregiver Support, requires a 25% local match). Since the total includes the Local Match, the 10% becomes 11.11% of the federal amount. The AAA administration must demonstrate a 25% Local Match, which comes to 33% of the federal funding amount. Failure to document at least the minimum required amount of Local Match will result in "disallowance," i.e., the retroactive loss of a proportionate amount of the federal allocation.

### **LTC LONG TERM CARE**

Under 1982's Torres-Felando Long Term Care Reform Act, LTC is defined as "a coordinated continuum of diagnostic, therapeutic, rehabilitative, supportive and maintenance services that addresses the health, social and personal needs of individuals who have restricted self-care capabilities. Services are designed to maximize . physical, social and psychological independence in the least restrictive environment. Services may be provided by formal and/or informal support systems and may be continuous or intermittent."

### **LTCC LONG TERM CARE COMMISSION**

A County Commission designed to address community-wide issues related to long term care. The Seniors Council Executive Director is a voting member of this commission in San Benito Counties. The Santa Cruz County LTCC was disbanded around 2008. The San Benito County LTCC has been renamed the Aging and Long Term Care Commission.

### **LTSS LONG TERM SERVICES AND SUPPORTS**

Long-term services and supports (LTSS) consist of a broad range of day-to-day help needed by people with long-term conditions, disabilities, or frailty. LTSS are often provided by friends and family members, community based organizations, volunteers, medical organizations, and local governments, or a combination of some or all of these.

### **MPfA MASTER PLAN FOR AGING**

Governor Gavin Newsom issued an Executive order for the creation of a California Master Plan on Aging. The Master Plan is intended to serve as a blueprint for state & local government, philanthropies, and the private sector to implement strategies and partnerships that promote healthy aging and prepare the state for demographic changes related to the aging of the population.

The **MPfA SAC**, or Stakeholder Advisory Committee, is charged with providing recommendations and expertise into the development of the Master Plan

**MERM** MONTHLY EXPENDITURE REPORT

MER's are submitted by each of the AAA's contracting agencies to document monthly expenditures. The AAA compiles the information contained in all of the MER's to submit monthly expense reports to the California Department of Aging.

**MIPPA** MEDICARE IMPROVE FOR PATIENTS & PROVIDERS ACT

Federal funding to help Medicare beneficiaries apply for the Medicare Part D Extra Help/Low-Income Subsidy (LIS) and the Medicare Savings Programs (MSPs). Funding is also used to provide Part D counseling to Medicare beneficiaries living in rural areas, and to promote new Medicare prevention and wellness benefits.

**MIS** MANAGEMENT INFORMATION SYSTEM

A data collection system which documents statistics recorded by service providers about the type of service they provide, the number of service units they provide, and the individuals receiving services. Most AAA funded programs collect this data and then the information is compiled at the AAA and submitted to CDA on a monthly basis.

**MOA** MEMORANDUM OF AGREEMENT

A written agreement between two parties, or among three or more parties, under the terms of which the parties agree to do certain things. Less formal than a contract, the latter is usually used when there will be an exchange of money.

**MOU** MEMORANDUM OF UNDERSTANDING

[See MOA] The Foster Grandparent/Senior Companion Program maintains official MOUs with all its Volunteer Stations in order to provide a record as to what the FG/SCP will do and what the Volunteer Station agency will do in their working relationship.

**MOWCA** MEALS ON WHEELS of CALIFORNIA

Meals on Wheels of America has recently formed a handful of state associations. MOWCA is attempting to partially fill the void that was created by the dissolution of CANDE, and often works in partnership with C4A in advocating for seniors, especially Senior Nutrition Funding.

**MSSP** MULTIPURPOSE SENIOR SERVICES PROGRAM

A multi-disciplinary program for Medi-Cal eligible senior at immediate risk of institutionalization, which -- under waivers of the usual restrictions for Medi-Cal funds - - uses federal reimbursement to purchase services which otherwise would not be allowable. Santa Cruz County has one of the state's original eight MSSP sites. The County Human Resources Agency discontinued the program due to budget shortfalls in

2011; Health Projects Center stepped in to avoid closure and has subsequently done the same in Monterey County.

**n4a** NATIONAL ASSOCIATION OF AREA AGENCIES ON AGING  
The nationwide equivalent of C4A.

**NACO** NATIONAL ASSOCIATION OF COUNTIES  
The federal equivalent of CSAC.

**NANASP** NATIONAL ASSOCIATION of NUTRITION and AGING SERVICES PROGRAMS  
The nationwide equivalent of CANDE.

**NAPIS** NATIONAL AGING PROGRAM INFORMATION SYSTEM  
A somewhat new data collection system designed by the federal government to replace the MIS to document the amount and type of service provided and information about the people receiving services.

**NARFE** NATIONAL ASSOCIATION OF RETIRED FEDERAL EMPLOYEES  
A nationwide organization whose members are former employees of the federal government, having local chapters across the country.

**NASUA** NATIONAL ASSOCIATION OF STATE UNITS ON AGING  
The nationwide organization representing CDA and the 49 other State Units of Aging.

**NEEDS ASSESSMENT** The process, taking several different forms, by which the AAA determines the new and/or continuing needs of the local senior population. Needs assessment data, which then support the Board's funding decisions, usually consist of a combination of thoughts expressed by the public at public hearings, ideas contributed by service providers, and information from the program evaluations.

**NGA** NOTIFICATION OF GRANT AWARD  
Previously the official document sent to the AAA by CDA informing the agency of the amount of money it could expect to receive for the fiscal period, and the categorical breakdown of those funds. This document is now being called the "Budget Display."

**NORCAL** NORTHERN CALIFORNIA ASSOCIATION OF FOSTER GRANDPARENT AND SENIOR COMPANION PROGRAM DIRECTORS  
The organization of FGP and SCP Directors from throughout Northern California, NORCAL meets on a bimonthly basis to discuss current issues of federal and state changes and to share information about program operation.

**OCA** OLDER CALIFORNIANS ACT

The piece of California statute providing authority for implementation of the Older Americans Act in this state. The OCA contains a number of programs that go beyond the OAA, and provide a variety of opportunities for improving the conditions of seniors living in California. Some of the programs within the OCA were never funded, and all program funding was eliminated in 2009. The OCA contains the IFF.

**OAA OLDER AMERICANS ACT**

The piece of federal law providing the basis for most senior service programs throughout the nation, including establishment of the Administration on Aging, State Units on Aging, Area Agencies on Aging, Ombudsman, Nutrition, Supportive Social Services and other programs. Originally passed in 1965, the Act has undergone numerous amendments. The AoA has administrative authority over implementation of the OAA. The Act is divided into various sections. The AAA deals primarily with Title III: III-B -- Supportive Services; III-C(1) -- Congregate Nutrition; III-C(2) -- Home-Delivered Nutrition; III-D -- Health Promotion & Disease Prevention; III-E-- Family Caregiver Support Program; and III-F --Disease Prevention and Health Promotion. Title VII (Ombudsman supplement and Elder Abuse Prevention and Education) have been eliminated as of July 2000 and folded into Title III-B—Supportive Services.

**OTO ONE-TIME-ONLY**

The term used to designate funds awarded for specific one-time uses or purchases and not to be considered part of basic or ongoing funding.

**PAC POLITICAL ACTION COMMITTEE**

An organization established with the purpose of advocating for and providing funding to support a specific political agenda or candidate. Although much of what it does is political in nature, the Seniors Council cannot be involved in partisan campaigns, and is not a PAC. [If this definition does not fit, see PAC below.]

**PAC PLANNING AND ALLOCATIONS COMMITTEE**

An arm of the Seniors Council established every four years to assess local needs and priorities, involve itself in long-range planning, reviewing proposals for Seniors Council/AAA funds, and making planning and funding recommendations to the AAA Advisory Council and the Board of Directors.

**PD&C PROGRAM DEVELOPMENT AND COORDINATION**

Two direct service categories which an AAA may provide without seeking a waiver from CDA. Generally, PD&C activities are not contracted out, but are provided from the AAA's administrative offices. Program Development consists of helping to create new services or to refine existing ones to fill gaps and/or meet identified needs. Coordination addresses the intent for an AAA to provide general oversight of all services to seniors, usually involving creating a network of service agencies. Activities related to existing Title III-VII programs do not count as PD & C activities.

**PERS** PERSONAL EMERGENCY RESPONSE SYSTEM

The generic term applying to systems usually consisting of an electronic device installed in the home of a client which, when triggered, alerts personnel in a base station to a possible emergency. [If this definition does not fit, see PERS below.]

**PERS** PUBLIC EMPLOYEES RETIREMENT SYSTEM

One of two major retirement systems paying pensions and providing benefits to retirees from state and local government employment.

**PHCA** PREVENTIVE HEALTH CARE FOR THE AGING

A state-funded program establishing a system of local screening and referral clinics to identify possible health problems in their early stages and to educate seniors about prevention and treatment options. In San Benito County the PHCA is a collaborative effort between Jovenes de Antaño and the County Health and Human Services Agency.

**PLANNING ESTIMATE**

The document sent to the AAA by CDA several months prior to the start of each state fiscal year, indicating the probable amounts of federal and state funds to be forwarded to the agency for the year. The Area Plan Budget is based on figures contained in this document.

**PM** PROGRAM MEMORANDUM

A directive sent out by CDA to advise AAAs on changes in policy or procedure, new regulations, federal initiatives, award of new funds, upcoming events, etc.

**PROVIDERS**

Also known as service providers, these are the service organizations and agencies meeting the identified needs of seniors in the area. These may be public (government,) private proprietary or private nonprofit groups. All current Seniors Council contracted providers are nonprofits. The decisions to grant contracts to providers are made during the RFP process.

**PSA** PLANNING AND SERVICE AREA

California is divided into 33 PSAs, in each of which an AAA has responsibility and jurisdiction for aging programs. The size of a PSA ranges from a single city (Los Angeles, San Francisco) to seven counties. Ours is PSA 13, consisting of San Benito and Santa Cruz Counties.[If this definition does not fit, see PSA below.]

**PSA** PUBLIC SERVICE ANNOUNCEMENT

A form of free media publicity available to public and nonprofit groups, usually generated by a Press Release issued by the group.



**PY** PROGRAM YEAR

The same as Fiscal Year. The AAA's Program Year is July 1 through June 30. State FGP and SCP operations are also on this Program Year. The TCE program is on an October 1 through September 30 Program Year.

**RAR** REQUEST FOR ADVANCE OR REIMBURSEMENT

The document sent to the state or federal government to request three months' funding for the FGP, SCP and TCE programs. The Seniors Council used to be able to advance payments in order to manage cash flow, but now can only receive these funds after expenditures have been incurred.

**RCFE** RESIDENTIAL CARE FACILITY FOR THE ELDERLY

Also known as Community Care or Board and Care facilities, RCFE refers to a state-licensed facility housing seniors. Jovenes de Antaño operates Golden Age Retirement Home, a licensed RCFE in Hollister.

**RFB** REQUEST FOR BIDS (aka IFB - Invitation For Bids)

The process of soliciting competitive bids from suppliers of goods or services, often used with audits and other contracted professional services.

**RFP** REQUEST FOR PROPOSALS

The public process whereby the AAA takes bids from service providers detailing the way in which they propose to make specific services available to local seniors, as those services have been defined by the AAA in its annual Public Hearing process. The Seniors Council/AAA has established a policy which requires an RFP process only every four years, although the process may be used in the intervening years at the request of the Board of Directors. An RFP process may also be undertaken to secure such services as an audit. Because public funds are involved, the Seniors Council's RFP process must adhere to the Code of Federal Regulations (CFR) so as to preclude unfair bias.

**RHP** RURAL HEALTH PROJECT

A past project in San Benito County, under special federal grants, operated by a nine-member consortium (including the Seniors Council) with the San Benito Health Foundation as the lead agency. This project seeks out older people and others to screen them for certain health conditions and to provide both appropriate referral and direct treatment.



**RHOP** RURAL HEALTH OUTREACH PROJECT

Same as RHP. In its first three years, the project focused on outreach.

**RRC** REGIONAL RESOURCE CENTER (FOR THE BRAIN-IMPAIRED)

The state-designated agency coordinating service and provision of information for families of caregivers to people with Alzheimer's Disease and other forms of brain

impairment which had its onset at age 18 or later. In Monterey, San Benito and Santa Cruz Counties, the Del Mar Caregiver Resource Center is the designated RRC. RRC's are now called Caregiver Resource Centers, or the CRC.

**RSVP** RETIRED SENIOR VOLUNTEER PROGRAM

The third component of the federal senior volunteer corps (under the same umbrella as Foster Grandparents and Senior Companions), this component does not pay an hourly stipend to seniors who provide a variety of services. Locally RSVP is operated in three counties by the Volunteer Center of Santa Cruz County.

**SBHF** SAN BENITO HEALTH FOUNDATION

The rural health clinic serving as the lead agency in a federally-funded Rural Health Project and the Familias Saludables (Healthy Families) project operated by a consortium of which the Seniors Council is one member agency.

**SCLS** SENIOR CITIZENS LEGAL SERVICES

The contracted service provider for legal services to older people in San Benito and Santa Cruz Counties. Our "Senior Legal" was the first program of its type in the United States, and provided the blueprint for such programs across the nation.

**SCP** SENIOR COMPANION PROGRAM

A program operated directly by the Seniors Council. Approximately 30 low-income seniors volunteer to work 20 hours per week providing companionship and light respite care to frail elders in adult day care centers, residential care facilities, and homes. In return for their work Senior Companions receive a non-taxable stipend of \$2.65/hour and a meal and are reimbursed for transportation.

**SCSEP** SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM

The Older Americans Act Title V senior employment program, operated in San Benito County under direct AoA contract with a group called Green Thumb and in Santa Cruz County under a direct AoA contract with the national AARP.

**SNAP** SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM

SNAP offers nutrition assistance to millions of eligible, low-income individuals and families and provides economic benefits to communities. SNAP is the largest program in the domestic hunger safety net. Previously known as Food Stamps.

**SNF** SKILLED NURSING FACILITY

Generally referred to as a "nursing home" or "convalescent hospital," SNFs are licensed by the state to provide heavier care than that available in an RCF or an ICF. Commonly pronounced "sniff."

**SNS** SENIOR NETWORK SERVICES

The contracted AAA service provider for Information and Assistance, Case Management, Consumer Services, Linkages, and In-Home Services in Santa Cruz County. SNS also operates the HICAP and a Respite Registry under direct contract with CDA, as well as a Senior Housing, a Senior Employment, and a Money Management program.

**SOFA SCHEDULE OF FUNDS AWARDED**

A display of annual allocations from the Area Agency on Aging to each of its contracted service providers.

**SPOTS STRATEGIC PLANS ON THE SHELF**

The end result of many Strategic Plans, because there isn't buy in, or there isn't sufficient resources to put it into effect, or because it's too elaborate and ambitious to implement. Many strategic plans exist because somebody thought it was a good idea to develop one, hoping that "if it is written the funding will come". A culture of strategic thinking, with or without a written plan, is more likely to result in action. Built-in timelines and milestones can improve Strategic Plan Implementation, but only if the plan contains realistic goals that are matched to resources, including staff and community hours.

**SSTAC SOCIAL SERVICE TRANSPORTATION ADVISORY COMMITTEE**

The state-mandated group, made up of 10 agency and consumer representatives, which advises and recommends to the Council of San Benito County Governments on transit and transportation matters affecting seniors, low-income people, and people with disabilities. The committee is the equivalent to Santa Cruz County's Elderly & Disabled Transportation Advisory Committee (E & D TAC).

**SUA STATE UNIT ON AGING**

As established in the Older Americans Act, every state must have an SUA. In California, this is the Department of Aging (CDA.)

**TACC TRIPLE A COUNCIL OF CALIFORNIA**

The statewide organization representing the 33 AAA Advisory Councils, this group meets regularly, usually in Sacramento, to discuss common concerns and to exchange information. The TACC works cooperatively with the C4A, the Commission on Aging and the CSL. Most Advisory Councils send their Chairpersons to TACC meetings.

**TARGETING**

The process whereby segments of the senior community are deliberately sought out through concerted outreach efforts and services are designed to attract disproportionate numbers of seniors from those segments of the senior population. Under the most recent guidelines, the target population includes Low-income seniors; Ethnic minority seniors; Seniors with limited-English Proficiency; Frail elderly and

individuals with disabilities; Rural or otherwise isolated individuals; Persons with Alzheimer's disease or related disorders (and their caregivers); and gay, lesbian, bisexual and/or transgendered seniors.

**TCE TAX COUNSELING FOR THE ELDERLY**

The program administered by the federal Internal Revenue Service to assist older people with their income tax returns through the use of a corps of trained volunteers. In Santa Cruz County, the Seniors Council has been the grantee for TCE funds for 12 years, contracting part of the service oversight to Project SCOUT.

**TTT TRANSPORTATION TASK TEAM**

The group of individuals that worked to implement the Transportation Component of the California Commission on Aging's Long Term Strategic Plan on Aging. The group focused on promoting best practices, encouraging coordination of services, promoting multi-modal transportation options for seniors, and working to change regulatory statutes which prohibit coordination and collaboration between providers. Caltrans disbanded the group around 2010.

**USDA UNITED STATES DEPARTMENT OF AGRICULTURE**

This term, in the context of Older Americans Act programs, refers to the reimbursement paid, through State Units on Aging and the AAAs, to senior nutrition service providers for every eligible meal served. The rate is set by Congress, and in 1996 was 57.8 cents per meal. By 2002, the rate had dropped to 53 cents. Nutrition programs report the numbers of meals served, the AAA compiles that information in a monthly report to the state, and reimbursement is received several months later. In 2003, this program was changed to Nutrition Services Incentive Program (NSIP), with available funds granted to each AAA in a lump-sum payment.

**VITA VOLUNTEER INCOME TAX ASSISTANCE PROGRAM**

The Volunteer Income Tax Assistance (VITA) program offers free tax help to people who generally make \$53,000 or less, persons with disabilities, the elderly and limited English speaking taxpayers who need assistance in preparing their own tax returns. IRS-certified volunteers provide free basic income tax return preparation with electronic filing to qualified individuals. Project SCOUT provides both VITA and TCE sites.

**VNA VISITING NURSE ASSOCIATION**

Nonprofit home health care agencies. In San Benito County, it is the Central Coast VNA and in Santa Cruz County, the Mid-Coast VNA which provide a range of nursing, therapeutic and rehabilitative services.

**VRC VETERANS RESOURCE CENTER**

New to Santa Cruz County in 2013, the VRC provides supportive services with a focus on the needs of veterans returning to the community after leaving the military. The

VRC and the Seniors Council are forming a new partnership for the management of the Seniors Council In-Kind Program.

**VSY VOLUNTEER SERVICE YEAR**

The standard measure of the amount of time a Foster Grandparent or Senior Companion volunteer would work during a full year. A volunteer serves 20 hours per week. Over a year's time this is a total of 1,044 hours which equals one Volunteer Service Year. Federal and state funding of the Tri-County FG/SCP is determined by the number of Volunteer Service Years the Program is authorized to provide.

**VOLUNTEER SITE**

The actual location where a Foster Grandparent or Senior Companion serves. Volunteer Sites include child and adult day care centers, schools, juvenile halls, battered women's shelters, halfway houses, hospitals and residential care facilities. There are over 60 Volunteer Sites in the three counties.

**VOLUNTEER STATION**

The agency with which the Seniors Council signs a Memorandum of Understanding, agreeing to provide a certain number of low-income senior FGP or SCP volunteers. The Volunteer Station usually provides, in return, a hot meal to each volunteer and a \$25 per month Share of Cost

**W&I WELFARE AND INSTITUTIONS CODE**

The part of state law in which are found all provisions governing operation of the AAA, the FGP and the SCP, including the Older Californians Act, the Intrastate Funding Formula and Long Term Care laws

**ZZZ SLEEP**

A naturally recurring state of mind associated with health, alertness, and general well being. REM (rapid eye movement) sleep is especially beneficial. Sleep is highly desired by seniors, children, parents of young children, and non-profit executive directors. Reading the acronym glossary in one sitting can result in the unplanned occurrence of ZZZ. Not to be confused with ZZ Top, which is a Texas-based rock band, featuring Billy Gibbons, Dusty Hill, and Frank Beard, and easily recognized by the matching hats, sunglasses, and long beards of Gibbons and Hill.

## GUIDE TO THE NUMBERS

Each title of the Older Americans Act represents a portion of the Older Americans Act, providing entitlements for particular services:

- Title III** The general category for Nutrition and Supportive Services.
- Title III-B** Supportive Services, such as Information & Assistance, Transportation, Legal Services, Case Management, Consumer Services, Senior Center Management, Housing, Senior Peer Counseling, etc.
- Title III-C** The general category for Nutrition Services.
- Title III-C(1)** Congregate Nutrition (meals served at a central site.)
- Title III-C(2)** Home-Delivered Nutrition (meals delivered to the home, often called "Meals on Wheels.")
- Title III-C(3)** School-Based Nutrition Services. [Never funded.]
- Title III-D** An evidence-based health promotion program, including programs related to the prevention & mitigation of the effects of chronic disease
- Title III-E** The Family Caregiver Support Program – a service category created in the year 2000 Older Americans Act Reauthorization
- Title IV** Research, Demonstration, Special Projects (such as disaster relief) and Training. [Not always funded.]
- Title V** Employment Services (e.g., Senior Community Services Employment Program.)
- Title VI** Services to older Native Americans.
- Title VII** The general category for protection services:
- Title VII-A** Long Term Care Ombudsman, protecting the rights of institutionalized elderly.
- Title VII-B** Elder Abuse Prevention and Education.

reviewed/amended 2-1-25