



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

AREA AGENCY ON AGING ADVISORY COUNCIL

Wednesday March 19, 2025

10 a.m. – 12 Noon

Hybrid in-person - Zoom Meeting
175 Westridge Dr., Watsonville, CA

Guests can also join via Zoom - *In person seating is limited*
<https://us02web.zoom.us/j/86490817703>

Meeting ID: 864 9081 7703
One tap mobile
+16699006833,,86490817703# US (San Jose)

Dial by your location
+1 669 900 6833 US (San Jose)
Find your local number: <https://us02web.zoom.us/j/86490817703>

AGENDA

- | | |
|---------|---|
| 10 a.m. | 1. Welcome, Call to Order and Introductions |
| | 2. Additions & Deletions to the Agenda |
| | 3. Receive Announcements from Advisory Council Members |
| | 4. Comments from Members of the Public on <u>Items Not on the Agenda</u> |
| 10:15 | 5. CONSENT AGENDA
Approve minutes of the February 2025 Advisory Council Meeting |
| | 6. Committee Reports |

175 Westridge Drive, Watsonville, California 95076 www.seniorscouncil.org
PHONE: AAA – (831) 688-0400 • FG/SCP – (831) 475-0816 • SCOUT – 1-877-373-8297 • FAX: (831) 688-1225

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MONTEREY, SAN BENITO, & SANTA CRUZ COUNTIES & YOUR PRIVATE DONATIONS

1. Advocacy Committee
 1. Crisis in Senior Services
 2. Development of Policy on Endorsements & Supports
 3. Ombudsman Funding Augmentation
 2. California Senior Legislature
-
- | | | |
|---------|-----|--|
| 10:40 | 7. | Advisory Council Vacancies <ol style="list-style-type: none">1. At-large - representing Persons with Disabilities2. Service Provider Representative |
| 10:45 | 8. | AAA Request For Proposals 2025-29 <ol style="list-style-type: none">1. Overview2. Proposal Review Committee Recommendation3. Board Action |
| 11:30 | 9. | Executive Director's Report <ol style="list-style-type: none">1. Master Plan for Aging & Solutions Summits2. State & Community Activities |
| 11:45 | 10. | Program Reports (written) <ol style="list-style-type: none">1. Project SCOUT2. Foster Grandparent/Senior Companion Program3. Aging & Disability Resource Connection (ADRC) |
| 11:55 | 11. | Miscellaneous Correspondence & Other Items |
| 12 Noon | 12. | Adjourn |

Next Meeting:
Wednesday April 16, 2025
175 Westridge Dr., Watsonville, CA

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.



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AREA AGENCY ON AGING ADVISORY COUNCIL
(Held in person at Aptos office with hybrid Zoom broadcast)

FEBRUARY 19, 2025

MINUTES

ADVISORY COUNCIL MEMBERS PRESENT:

Gabriela Trigueiro (City of Santa Cruz)
Steve Clark (City of Scotts Valley)
Jimmy Dutra (City of Watsonville)
Angela Curro (San Benito County Board of Supervisors)
Mindy Sotelo (San Benito County Board of Supervisors)
Scott Freels (City of San Juan Bautista)
Mark Johannessen (At-large, Seniors Commission)

ALTERNATES PRESENT:

Sandy Brown (alternate J. Cummings)

ADVISORY COUNCIL MEMBERS EXCUSED:

Justin Cummings (Santa Cruz County Board of Supervisors)
Kimberly De Serpa (Santa Cruz County Board of Supervisors)
Gerry Jensen (City of Capitola)
Roxanne Stephens (Mayor, City of Hollister)

VACANCIES: Representative of Persons with Disabilities/Low Income; CSL Rep.; At Large Rep.

STAFF PRESENT:

Clay Kempf, Seniors Council Executive Director; Zach Johnson, Seniors Council Administrative Services Officer; Corey Shaffer, Seniors Council Community Coordinator; Patty Talbott, AAA Administrator

OTHERS PRESENT:

Jacques Bertrand

1. Welcome, Call to Order and Introductions

Acting Chair Sandy Brown called the meeting to order at 10:06 AM. Introductions were made.

2. Additions and Deletions to the Agenda

None.

3. Receive Announcements from Advisory Council Members

None.

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5-1

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

Jacques noted that Grey Bears was voted best thrift store in Santa Cruz County; described programs and events.

5. Consent Agenda

Advisory Council members were referred to Pages 5-1 to 5-3, minutes of the November 2024 AAA Advisory Council meeting.

MOTION, Johannessen/Brown, to approve the minutes of the November, 2024 AAA Advisory Council meeting. **PASSED**

6. The AAA Advisory Council – Overview of Roles & Responsibilities

1. The Area Agency on Aging & the Seniors Council – Clay ran a PowerPoint deck introducing AAA Advisory Council, its programs and goals, and roles of members. AAA is part of the Seniors Council umbrella.
Clay covered Project SCOUT, San Benito ADRC, FGP/SCP, and AAA for Planning and Service Agency (PSA) 13.
Mindy asked about ADRC in Santa Cruz; Clay responded that SC did Age-Friendly first, with eventual goal to have both in both counties.
2. What's the Older Americans Act and the Older Californians Act? – enacted in 1965, along with Medicare and Medicaid. Administration for Community Living (ACL) oversees AAAs nationwide, with a focus on local control.
Jimmy asked about impacts of Executive Orders, Clay confirmed the threats are real and severe.
3. AAA & Advisory Council Role in the Community- Clay discussed appointing of AAA and role within PSA. Kim asked about possible impacts of AAA potentially being absorbed by local governments. Would increase expenses for salaries, etc. and would eliminate efficiencies gained by two-county model. Angela pointed out SBC would lose out immensely if counties were split.
4. AAA Oversight & Responsibilities – Clay presented 20 pages of services that AAAs can offer, not all are in action at once due to limits of funding. Provides focal point for coordination of senior services – Senior Network Services (SNS) manages this, recently relocated office. AAAs also comment on local plans affecting seniors. Current budget is between \$5-6 million. Clay described the four-year Planning Cycle; currently in year 3 and RFPs.
Highlights: Home-delivered meals, paratransit rides, response to LTC complaints, meals at Senior Centers, Health insurance navigation assistance, free legal assistance. Jimmy asked where to find these, Clay pointed to SNS, “yellow book” resource guide, and ADRC & their resource guide.
AAAs must conduct annual independent financial audit in addition to monthly California Department of Aging (CDA) monitoring and fiscal audits.
AAA has both Board of Directors and Advisory Council.
Role of Advisory Council: Input and oversight to all discussed above; share AC discussions & recommendations with those you represent; advocate for older adults.
5. Questions and Discussion – Mindy asked about annual number of Ombudsman cases, Clay will research. Kim asked about volunteers, Clay said COVID reduced numbers across all programs.
Clay covered county demographic shifts, especially growth in % of older adults.

7. Updates – Current Projects

1. AAA Request for Proposals 2025-29 – deadline was Feb. 18. Competing applications only in SBC, for meal-related and family caregiver support programs. Grey Bears standing by to provide kitchen services if needed. Jacques praised Jennifer as new ED of Grey Bears. Proposal review panel meeting soon.

2. Local Crisis in Senior Services
 - a. *Unprecedented Growth (#1 & #3 in all of California) – covered previously*
 - b. *Unprecedented Local Funding Cuts – covered previously*
 - c. *Loss of Live Oak Senior Center - our Service Hub – covered previously*
3. Distribution of Remaining Nutrition Funding – in packet, Item 7. Unspent \$41,000 from last year to be reallocated to Community Bridges, but other future funding would be unaffected. Discussion of Jovenes de Antano's reporting issues, impact of changes to service provision.
4. Master Plan for Aging Local Playbooks -

8. Executive Director's Report

1. Master Plan for Aging & Solutions Summits
2. Agency Operations
3. Funding & Diversity, Equity, & Inclusion (DEI) – AmeriCorps grants being targeted by Executive Orders. Must either certify compliance, or resubmit grant and change language, or begin processing of defunding. Currently on an extension through Friday. Reaching out to various officials for input and advice. Will likely amend proposal to avoid targeted language.

9. Program Reports (written)

1. *Project SCOUT*
2. *Foster Grandparent/Senior Companion Program*
3. *Aging & Disability Resource Connection (ADRC)*

10. Miscellaneous Correspondence

11. Adjournment

The meeting was adjourned at 12:06 PM

Minutes prepared by: Zachary Johnson



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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: 3-13-25

To: Seniors Council Board of Directors

From: Clay Kempf, Executive Director

RE: March Advocacy Committee Report

LOCAL CRISIS IN SENIOR SERVICES

Communicating to elected officials and the public about the growing crisis in services to older adults continues as one of the key topics discussed during our Advocacy Committee. As previously shared, 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. At the forefront of these efforts will be meeting with various County Supervisors and mayors of our local cities.

NATIONAL THREATS TO SERVICE

The challenges of President Trump's Executive Orders to eliminate DEI program funding continues to loom large. Additional threats to programs such as Social Security, Medicaid, and Medicare are especially worrisome.

SENIORS COUNCIL ENDORSEMENTS OF GRANTS AND PROJECTS OF OTHERS

We often write supporting letters for grants our community partners are pursuing, or budget augmentation requests. Typically those follow projects that are consistent with our agency mission, or that augment positions previously taken (such as increased funding to meal programs, ADRC's, Ombudsman, etc.). More recently, however, we are being asked to endorse private projects, including those involving the development of housing that includes units for older adults. Deciding whether or not to provide endorsements of this nature is complicated, and determining the pros and cons of any development requires housing expertise and detailed, time-consuming analysis, neither of which we have in abundance. Staff has suggested that we adopt a set of fact-based

statements about the growth of the senior population and some basic concepts about housing for older adults (e.g. Auxillary Dwelling Units; Universal Design; Need for fewer bedrooms than young families, etc.). These statements can then be used by decision makers, housing advocates, and developers as points to use in assessing a specific project.

Additional discussion is needed including Board Guidance on whether this is a direction for staff to pursue.

SAMPLE ADVOCACY EFFORTS

Included in this month's report are some sample advocacy letters to protect Medicaid. Also included is an overview of this year's efforts by the California Long Term Care Ombudsman Association to augment funding for local Ombudsman programs. The new effort continues to target non-general fund revenue streams, and seeks to increase the baseline allocation of all Ombudsman programs from \$100,000 per year to \$200,000. We have already signed onto the support letter for this effort, as increasing Ombudsman funding is an ongoing effort we continue to support.

A Cut to Medicaid is a Cut to Medicare

FEBRUARY 2025

68 million individuals are enrolled in Medicare—and one in five rely on Medicaid to afford and access essential health and long-term care. **Without Medicaid, 12 million Medicare enrollees could not access the care they need, jeopardizing their health and well-being.** Given that nearly 30% of all Medicaid dollars directly support Medicare enrollees, any proposed cuts to Medicaid are, in effect, cuts to Medicare.



**of Medicaid
dollars support
Medicare
enrollees**

Medicaid Makes Medicare Affordable

Medicare is costly, with high premiums and out-of-pocket expenses that many seniors and people with disabilities could not afford without Medicaid.

✓ **Medicaid provides Medicare premium assistance.**

Medicaid covers premiums for 1 in 6 Medicare enrollees. This relief from the \$185 Medicare Part B monthly premium helps over 10 million seniors and people with disabilities by increasing their income by 10-20%.

✓ **Medicaid covers out-of-pocket costs.**

Medicaid covers Medicare's co-insurance, co-pays, and deductibles, ensuring that 8 million Medicare enrollees living on incomes near or below the poverty line can access needed care and have money for other basic needs.

Medicaid opened the door to Medicare for Carrie



Medicaid's coverage of Medicare premiums and out-of-pocket costs was life changing for Carrie, an 81-year-old living in Mansfield, Ohio. Carrie had delayed enrolling in Medicare Part B because she was working, and later hesitated to enroll because she feared having to pay late enrollment penalties. She was going without needed medical care and was hardly able to pay for her prescription drugs. After an Area Agency on Aging helped her enroll in Medicaid and get financial assistance with her prescription drug costs, Carrie was able to afford to enroll in Medicare. Thanks to Medicaid, she could finally see her doctor, fill her prescriptions, and have enough money for basic things like her utilities and groceries.

Medicaid Fills Critical Gaps in Medicare Coverage

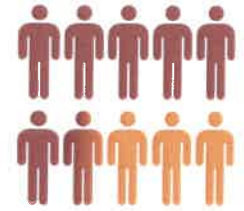
Many people assume Medicare provides comprehensive health and long-term care coverage. However, Medicare has big gaps in coverage. Medicaid plays a vital role in filling those gaps, enabling Medicare enrollees to stay healthy and live in their communities.

✓ **Medicaid enables Medicare enrollees to age in place.**

Medicaid is the **primary payer of home-based care**, covering a wide array of personal care and other support through Medicaid home and community-based services (HCBS).

✓ **Medicaid is the primary payer of nursing facility care for Medicare enrollees.**

While Medicare covers short-term skilled nursing facility stays following a hospitalization, **Medicaid covers the majority of long-term stays**. More than 6 in 10 nursing facility residents rely on Medicaid, including those with Alzheimer's and dementia.



**More than 6
in 10 people
in nursing
facilities rely
on Medicaid**

✓ **Medicaid covers essential care not covered by Medicare.**

Medicaid also covers critical services that Medicare does not, such as transportation to medical appointments, medical equipment like mobilized wheelchairs, dental, vision, and hearing benefits, and some treatment options for substance use disorder.

Medicaid Strengthens Medicare for All Enrollees

Medicaid makes Medicare a more accessible and stronger program. If Medicaid is cut, Medicare would incur more costs, and all Medicare enrollees could lose access to health care providers.

✓ **Medicaid saves Medicare dollars.**

By filling in gaps in coverage and affordability, **Medicaid prevents hospitalizations and poor health outcomes for Medicare enrollees**. Medicaid also helps those before Medicare age obtain the care they need, preventing worse health outcomes and higher costs when they enter Medicare.

✓ **Medicaid supports access to care for everyone with Medicare.**

Medicaid provides critical funding to hospitals and other providers, particularly in rural areas, ensuring that all Medicare enrollees have access to necessary care.

Bottom Line: A Cut to Medicaid is a Cut to Medicare

Cutting Medicaid threatens the health of millions and undermines the Medicare program. It is essential to safeguard and strengthen Medicaid to ensure all Medicare enrollees can continue to access the vital care and support they need.

6-4



Karol Swartzlander, Executive Director
Gavin Newsom, Governor

February 21, 2025

David Lindeman
CHAIR

Dana Toppel
VICE CHAIR

The Honorable [Name]
United States House of Representatives
[Location] House Office Building
Washington, D.C. 20515

Dear Representative [Name]:

The California Commission on Aging (CCoA) is established in state statute as the principal advocate for older Californians. We have had the privilege to work on behalf of thousands of Californians to whom Medicaid has made a meaningful difference for fifty years.

Today, we are writing to urge you to exclude any Medicaid cuts, work requirements, or any changes that would limit funding or eligibility from budget reconciliation or other legislation.

Medicaid, or Medi-Cal in California, provides essential health insurance for older adults, individuals with disabilities, veterans, low-income adults and children, and caregivers, among others. In addition to health care, Medicaid also funds critical home and community-based service (HCBS) programs such as the In-Home Supportive Services (IHSS) program that assists older adults and individuals with disabilities to remain in their homes and communities, and nursing facility care and Medicaid Buy-In Program for Working People with Disabilities. It is important to note that Medi-Cal also supports individuals with developmental disabilities through regional centers and 44% of direct care worker households rely on Medi-Cal. Medi-Cal promotes these individuals' ability to go to work and care for their loved ones. As a lifeline for many, 14.9 million Californians rely on Medi-Cal every day for their health, safety, and independence.

In your District {Number}, [Number] of your constituents would be severely impacted by cuts to Medicaid, including:¹

- [Number] health coverage for workers, people with disabilities, children, and older adults (Medi-Cal)
- [Number] people receiving support to live in their home (IHSS)
- [Number] people with developmental disabilities (regional centers)
- [Number] foster youth



Karol Swartzlander, Executive Director
Gavin Newsom, Governor

Families across your district depend on Medi-Cal to access wellness checks, cancer screenings, ongoing treatment for chronic health conditions, assisted living and nursing home care, and other essential services that would be out of reach without this vital program. For many people with disabilities and older adults, timely access to needed care is a matter of life or death--and Medi-Cal is the only program that can meet their needs.

Proposed cuts would force California to cut vital programs and services that federal law does not require to be covered. Likely targets include HCBS programs, dental, vision, and hearing care, along with expanded eligibility for Medicare Savings Programs that assist individuals with limited income and resources pay for some of the costs associated with Medicare.²

Finally, providing access to care in physician offices with Medi-Cal helps individuals avoid expensive hospitalizations and reduces reliance on overcrowded, understaffed emergency rooms for routine care. Medicaid is also a critical funding source for many hospitals, **especially rural ones**, to keep their doors open. Work requirements create unnecessary administrative barriers that lead to coverage losses, and research shows they do not improve employment outcomes.³

Access to Medicaid is a matter of life, death, and independence for millions of Americans, including individuals with disabilities, older adults, caregivers, and the direct care workforce. **We strongly oppose per capita caps, block grants, work requirements, eligibility restrictions, enrollment barriers, Federal Medical Assistance Percentage (FMAP) changes, and any other cuts or harmful changes to the Medicaid program.** The result of these proposals is the same: eradicating coverage from those who rely on Medicaid for healthcare and long-term services and supports. Please stand with Californians in protecting Medicaid by opposing any attempts to weaken this essential program.

If you have any questions, contact Karol Swartzlander, Executive Director, at (916) 419-7593.

Sincerely,

Dr. David Lindeman
Chair
California Commission on Aging



1017 L Street, #227
Sacramento, CA 95814
Admin@CLTCOA.org
www.CLTCOA.org

March XX, 2025

Honorable Mike McGuire
President Pro Tempore of the Senate
1020 O Street, Room 8518
Sacramento, CA 95814

Honorable Robert Rivas
Speaker of the Assembly
1021 O Street, Room 8330
Sacramento, CA 95814

Honorable Scott Wiener, Chair
Senate Budget and Fiscal Review Committee
1020 N Street, Room 502
Sacramento, CA 95814

Honorable Jesse Gabriel, Chair
Assembly Committee on Budget
1021 O Street, Room 8230
Sacramento, CA 95814

Honorable Akilah Weber Pierson, Chair
Senate Budget and Fiscal Review Subcommittee #3
1020 N Street, Room 502
Sacramento, CA 95814

Honorable Corey Jackson, Chair
Assembly Budget Subcommittee #2
1021 O Street, Room 8230
Sacramento, CA 95814

RE: 2025 Budget Request for Local Long-Term Care Ombudsman Programs

Budget Committee and Subcommittee Chairs,

On behalf of the California Long-Term Care Ombudsman Association (CLTCOA) and our undersigned organizational partners, we write you in support of our request for **\$15.9 million** in ongoing annual funding for the California Department of Aging's local Long-Term Care Ombudsman Programs co-sponsored by Senator Ochoa Bogh, Senator Reyes, Assemblymember Gallagher, and Assemblymember Harabedian.

Older adults and adults with disabilities living in long-term care facilities across California are needlessly suffering because they lack consistent access to Long-Term Care Ombudsman Program (LTCOP) services. Some regions of California have as few as one paid staff Ombudsman. Yet the state consistently has enough special funding in reserves to adequately staff the program to address residents' current unmet needs.

LTCOPs provide free, resident-centered advocacy to residents of over 9,000 skilled nursing and assisted living facilities in California. They not only resolve residents' complaints around health, safety, and quality of life issues, but investigate all reports of elder and dependent adult abuse and neglect occurring in long-term care (APS does not have jurisdiction). LTCOPs also provide other critical services to residents, facilities, and the community, including: witnessing all advanced health care directives (AHCDs) signed in long-term care under state law; supporting the development of resident and family councils; and providing information, assistance, and training to staff, residents, and family members. **LTCOPs save California millions of dollars by addressing complaints that would otherwise be escalated to the licensing agencies (CDPH and CDSS) and law enforcement at a much greater cost.** They also help escalate the most egregious complaints to the licensing agencies so the state can recover millions in regulatory penalties. These penalties are often the only reason the facility corrects behaviors that harm residents.

California's LTCOPs face numerous challenges that continue to hinder their ability to meet the existing demand for their services under their existing state and federal mandates:

- **The program has lost over half its volunteers since 2014**, in no small part due to the COVID-19 pandemic. Many LTCOP volunteers were themselves older adults (usually retired professionals) at risk

of contracting COVID-19 and therefore unable to visit facilities. It is also generally becoming more difficult to recruit volunteers who are willing to complete the 36-hour federal training requirements to become certified to volunteer as an Ombudsman.

- **Cases are becoming more complex** as the long-term care industry itself becomes more complex and instances of abuse and neglect make up a higher proportion of the LTCOPs' workload. Staff and volunteers must receive training on these new statutes, regulations, and best practices. Most programs only rely on paid staff to investigate abuse and neglect cases rather than volunteers too.
- **Caseloads continue to increase.** Today, the average paid Ombudsman in California is responsible for 1,830 beds while the average volunteer Ombudsman is responsible for 885 beds on any given day. This does not account for the fact that numerous residents can be assigned to the same bed at different times of the year, especially in skilled nursing facilities where the average stay is typically shorter.
- **More younger Californians are being admitted to long-term care facilities with increasingly complex needs while older residents who are living longer also require continually higher levels of care.** Furthermore, the total number of older Californians continues to dramatically increase. More long-term care facilities will need to be built to accommodate those Californians.
- **28% of skilled nursing and 51% of assisted living facilities are not receiving all four quarterly unannounced visits as required by federal law** according to 2023-2024 program data. More paid staff and volunteers are needed to meet the LTCOP's requirement to visit all facilities quarterly. Increasing visits will result in Ombudsmen receiving additional complaints from residents who did not have regular access to LTCOPs services due to this lack of ongoing physical presence.
- **Ombudsman jurisdiction now includes 14 different types of long-term care facilities.** Yet the LTCOP is largely only funded to address complaints and respond to abuse allegations in skilled nursing and assisted living facilities. No new funding has been tied to these other facility types.
- **Statewide funding for the program is stagnating** despite an increase in demand for services and the impact of inflation. Before last year, state special funds for the program had not increased since 2015. The 2024 Budget Act included \$5.25 million in One-Time-Only (OTO) for LTCOPs because of CLTCOA's request, but that funding is at risk.

Older adults and adults with disabilities living in long-term care in California shouldn't be invisible. Many of these residents lack friends or family who can protect them. LTC Ombudsmen exist to be the voice of residents who cannot advocate for themselves. Despite the lack of funding for their programs, LTC Ombudsmen consistently are protecting the legal and human rights of residents through, for example:

- Preventing unlawful transfers and discharges of skilled nursing residents to homeless shelters;
- Protecting the rights of non-conserved residents unlawfully admitted to locked dementia care facilities;
- Helping facilities with emergency preparedness planning such as evacuation procedures;
- Ensuring residents have consistent access to visitors in public health emergencies; and
- Resolving everyday disputes with facility staff that affect residents' comfort and safety.

The recent fires in Los Angeles shined a bright light on the work our Ombudsmen do to support residents in response to natural disasters. Ombudsmen from WISE & Healthy Aging were standing by at the Eaton Fire Evacuation Center to receive displaced residents. They coordinated with other agencies and community partners to ensure residents had necessary supplies and transportation to safe temporary locations. Ombudsmen also followed up with residents afterwards to ensure they were settled and connected to their family and caregivers.

It's the responsibility of the state to adequately fund LTCOPs to protect our older adults and adults with disabilities living in long-term care. Two special funds at CDPH are already providing support to the Ombudsman program. There are sufficient resources in these funds to ensure that residents in long term care facilities have access to the Ombudsman program. These funds are earmarked for quality assurance activities in long-term care, including the LTCOPs. And because these funds would be used to support existing state and federal mandates, our request is therefore consistent with the Department of Finance's requirements for a "workload budget" in 2025.

June 15 is not only the Legislature's deadline to pass the Budget Act, but World Elder Abuse Awareness Day. We respectfully urge the Assembly and Senate to include enough funding for LTCOPs to continue their work protecting residents from discrimination, abuse, neglect, and exploitation. In doing so, we will not only make progress towards Goal #3 of California's Master Plan on Aging for 2030 but enable all Californians living in long-term care to age joyously and gracefully with dignity.

For these reasons, CLTCOA and our partners strongly support this budget request.

Respectfully,



Crista Barnett Nelson
President
CLTCOA



Jason Sullivan-Halpern, J.D.
Director
CLTCOA

Organizations in Support

CDA's Office of the State Long-Term Care Ombudsman (OSLTCO)
California Elder Justice Coalition (CEJC)

LIST ALL ORGANIZATIONS THAT SIGN ON HERE
(logos will be on the "cover sheet" i.e. Page 1)

DRAFT



CLTCOA is requesting **\$15.9 million** in ongoing annual funding from two special funds that currently fund California's 35 local Long-Term Care Ombudsman Programs (LTCOPs).

Under federal and state law, LTC Ombudsmen provide free, resident-centered advocacy services in long-term care facilities, including:

- Resolving residents' complaints related to health, safety, and quality of life
- Responding to mandated reports of abuse and neglect (APS does not have jurisdiction in long-term care)
- Providing information, assistance, and training to residents, staff, and families
- Supporting the development of Resident and Family Councils and attend meetings
- Witnessing Advanced Health Care Directives (AHCDs) signed in LTC facilities as required by state law

Services are delivered by local programs working under the Area Agencies on Aging (AAAs) with supervision from the Office of the State Long-Term Care Ombudsman (OSLTCO) at the California Department of Aging (CDA).

6-10



Stories from the Field

When several fires overtook Los Angeles earlier this year, Ombudsmen from WISE & Healthy Aging called facilities to provide them with the most up-to-date information about evacuation orders. Ombudsmen were on site at the Eaton Fire Evacuation Center to receive displaced facility residents. Ombudsmen also coordinated with other agencies and community partners to provide necessary supplies and transportation to move those residents to safe temporary locations. Later they followed up with those same residents.



2025 State Budget Request

Current Unmet Need

Unannounced quarterly facility visits	\$1,433,880
Complaint investigation and other required advocacy activities	\$6,169,580
Baseline funding increase and subregional program funding	\$8,300,000
TOTAL REQUEST	\$15,903,460

Special Funding Sources

CDPH State Health Facilities Citations Penalty Account Reserves	\$10,000,000
CDPH Licensing & Certification Program Fund Reserves	\$40,000,000
AVAILABLE EARMARKED FUNDS	\$50,000,000

Voting "AYE" on this proposal will:

- Address non-compliance with current state and federal mandates for quarterly facility visits
- Reduce and prevent abuse and neglect in long-term care facilities across California
- Increase access to critical Ombudsman services to residents of 14 types of care facilities
- Hire more paid staff to train and supervise new volunteers recruited by CDA/OSLTCO in 2025-26
- Increase baseline funding to all local programs to account for rising program costs

2024 Program Data

Certified Staff Ombudsmen (FTEs)	176
Skilled nursing facilities	1,189
Assisted living facilities	7,798
Complaints received	34,864
Information & Assistance provided	84,167
Trainings to community and staff	1,026

For more information, contact:

Jason Sullivan-Halpern, J.D.

Jason@CLTCOA.org

DISTRICT IMPACT

Counties: _____

Long-term care facilities	
Total number of beds	
Certified Staff Ombudsmen	
Certified Volunteer Ombudsmen	
Resident complaints addressed last year	
Information & Assistance provided last year	
Current Annual Funding	
Estimated Increase in Funding	

About Your Local LTC Ombudsman Program

6-11





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: March 19, 2025

To: Seniors Council Advisory Council

From: Zachary Johnson, Administrative Services Officer

RE: Advisory Council Persons with Disabilities Vacancy

Stephanie Auld has applied to join the Seniors Council Advisory Council as a representative for persons with disabilities. She is a current commissioner on the In-Home Supportive Services Advisory Commission, a member of the Central California Alliance for Health Member Services Advisory Group, and a member of the Elderly and Disabled Transportation Advisory Committee. Her more detailed application is attached to this memo.

Staff recommends that Stephanie application be reviewed and that she be considered for appointment to the vacant Persons with Disabilities position via a vote of the sitting members present.

7-1

Stephanie Auld

AREA AGENCY ON AGING ADVISORY COUNCIL APPLICATION

APPLICATION FOR:

- ☐ AAA Provider Representative
- ☒ **X Representative for Persons with Disabilities**
- ☐ At Large

PLEASE CHECK ANY THAT APPLY:

- ☒ **X Low-Income**
- ☒ **X Experience with, or as Family Caregiver**
- ☐ California Senior Legislature Representative
- ☐ Experience in Healthcare Sector
- ☐ Age 60+

ETHNICITY:

- ☐ White
- ☐ Hispanic
- ☒ **X Black**
- ☐ Asian/Pacific Islander
- ☐ Native American/Alaskan Native
- ☐ Other

Why are you interested in serving on the AAA Advisory Council?

In 2008, a close friend asked me to support her as she began a dangerous health treatment for a chronic illness. She said, "Since you've been managing your multiple sclerosis for 8 years now, I consider you an expert navigator of the health care industry." I became a care provider for her as the treatment prolonged and an IHSS provider a couple of years after that for other friends tackling health concerns. During those 14 years of caregiving, I experienced the challenges that seniors and disabled people routinely tackle. Now that I am wheelchair dependent myself, I understand those challenges and the emotional struggles to overcome them more intimately. I enjoy referencing my own experiences to help others feel that they are not struggling alone, to give advice to overcome common challenges,

Stephanie Auld

and to advocate for processes and systems that better support seniors and disabled people and thereby, facilitate our communities' advancement.

I admire the Senior Council's work to maintain the visibility of seniors and the disabled as well as to promote the provision of infrastructure that ensures accessibility in our county. I am doing that work; however, I would enjoy working with a team that addresses a broader spectrum of senior and disabled concerns than the more focused committees to which I currently contribute.

Please share your relevant work and/or volunteer experience that relates to the work of the AAA Advisory Council.

May 2024 to Now	Commissioner on the Santa Cruz County IHSS Advisory Commission
September 2024 to Now	Member of the Central California Alliance for Health Member Services Advisory Group
December 2024 to Now	Member of the Elderly and Disabled Transportation Advisory Committee
2007 to 2011	Master Instructor for the Santa Clara Valley Medical Center Healthier Living Program



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: 3-14-25

To: Seniors Council Board of Directors
AAA Advisory Council

From: Clay Kempf, Executive Director

RE: RFP Proposal Review Panel Recommendations

BACKGROUND

Every four years, AAA's around the country are required to open their funding for interested non-profit organizations to apply for services. We're no exception, and like many of our colleagues, this is a request for funding year for contractors of Planning and Service Area 13, covering Santa Cruz & San Benito Counties.

Our Proposal Review Panel is meeting for the second time Friday afternoon, and their recommendations will be sent out to all of our Board members and Advisory Council members Friday night or Saturday morning. Their recommendations will be a major part of our meeting discussions, so please be on the lookout for it.

8-1

Seniors Council/Area Agency on Aging of Santa Cruz & San Benito Counties

AAA LETTER OF INTENT FORM

Required

Agency Name:

Street Address:

Mailing Address (if different):

E-mail contact(s)

Agency Certification Statement: I certify that I have legal authority to commit this agency to a contractual agreement. I have reviewed the sample contracts and am aware of the requirements contained therein. I certify that the agency is capable of and willing to meet all the required provisions of the Older Americans Act, the Older Californians Act, and any and all related requirements of contracting with the Seniors Council of Santa Cruz & San Benito Counties

Name & Title (typed):

Signature:

Date:

Service(s) Applying For:

Check Box if
Applying

Santa Cruz County Services:

Fill out highlighted boxes where
applicable

<u>Title IIIB Supportive Services</u>		Available Funds	Proposed
	Mealsite Transportation	\$20,000	
	Case Management	\$27,250	
	Information & Assistance - Comprehensive & Countywide, including managing 1-800-510-2020 I & A phone line	\$77,500	

<u>Senior Nutrition Programs</u>		\$1,030,000 Total	
	<u>Congregate Dining</u>	Available: \$360,000	
	Location of Site or Sites (List)	Number of Days per Week	Proposed Cost of site
	<u>Home-Delivered Meals (County-wide)</u>	Available: \$670,000	
		Proposed:	

<u>Title IIIE Family Caregiver Support (total)</u>		\$115,000	Proposed
	<i>Must include all sub-categories</i>		
	Caregiver Access*		
	Caregiver Information Services*		
	Caregiver Support Services*		
	Caregiver Respite*		
	Caregiver Supplemental Services*		
* see attachment for subcategories			

Check Box if
Applying

San Benito County Services:

Fill out highlighted boxes where
applicable

<u>Title IIIB Supportive Services</u>		Available Funds	Proposed
	Mealsite Transportation	\$23,000	

<u>Senior Nutrition Programs</u>		\$337,000 Total	
<u>Congregate Dining</u>		Available: \$118,000	
Location of Site or Sites (List)		Number of Days per Week	Proposed Cost of site
<u>Home-Delivered Meals (County-wide)</u>		Available: \$219,000	
		Proposed:	

<u>Title IIIE Family Caregiver Support (total)</u>		\$38,000	Proposed
	<i>Must include all sub-categories</i>		
	Caregiver Access*		
	Caregiver Information Services*		
	Caregiver Support Services*		
	Caregiver Respite*		
	Caregiver Supplemental Services*		
* see attachment for subcategories			

Services in both Santa Cruz & San Benito Counties:

			Proposed
	<u>Title IIIB</u> Legal Assistance	\$92,000	
	<u>HICAP</u> (Health Insurance Counseling & Advocacy Program)	\$293,000	

REQUEST FOR PROPOSALS

Older Americans Act **Title III Funding**

AREA AGENCY ON AGING OF **SANTA CRUZ & SAN BENITO COUNTIES**

2025-2029 **Procedural Guide & Application**

Release Date: January 7, 2025

Final Date for Submission: 4 p.m., February 18, 2025

RFP Table of Contents

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List of Attachments Available on AAA Website (seniorscouncil.org)

1. Proposal Checklist
2. Proposal Coversheet
3. Statement of Project Requirements and Assurances
4. Assurance of Compliance with all Federal, State, and Local Contractual Requirements
5. Budget Forms
6. Scope of Work and General Definitions and Requirements for Older Americans Act Programs
7. Demographics of Older Adults in the Planning & Service Area
8. California Department of Aging Senior Needs Assessment Report
9. 2025-2029 Area Plan Excerpts
10. Sample Service Provider Contract

PROPOSAL FOR FUNDING

2025-2029

1. BACKGROUND

The Seniors Council serves as the Area Agency on Aging (AAA) for Santa Cruz and San Benito Counties. As such, it receives federal and state funds under the authority of the Older Americans Act and the Older Californians Act. The Seniors Council awards contracts to provide direct services to residents of Santa Cruz and San Benito Counties who are 60 years of age or older.

2. MULTI-YEAR PROCESS

Under federal law, the AAA must conduct an area-wide senior needs assessment and Request For Proposals (RFP) at least every four years. During this planning cycle, the California Department of Aging completed a statewide survey and provided a report to each AAA. The full report is available on the Seniors Council website (www.seniorscouncil.org). The California Department of Aging requires submittal of a four-year Area Plan on Aging, that incorporates needs assessment results and describing services to be provided. Each AAA has the discretion to issue an RFP annually or at other increments within the four years. The Seniors Council has elected to conduct a complete RFP process for the years 2025-29.

A. Goal of RFP

The goal of the RFP is to identify agencies that can most effectively provide services to the targeted population and address the unmet needs in the community, with the expressed purpose of entering into a contractual agreement with the selected agency/agencies for delivery of those services.

Applicant organizations selected for contracts and funds in the 2025-29 RFP process will receive contracts for fiscal year 2025-26, with the understanding that the general intent is to continue those contracts for three additional one year terms. It is to be understood that each annual contract is subject to change in scope of service, funding level and terms and conditions. A contractor may terminate the contract at any time, as provided in the contract terms. The Seniors Council Board of Directors retains the same right to terminate a contract, as also provided in the contract terms.

B. Format of Proposal

All applications shall be submitted as described throughout this document. Proposals shall be computer generated, using a minimum of a 12-point font. The Proposal

Narrative (Section 3) can be of any length, however, *brevity is strongly encouraged*. Please make sure that all questions are completely answered. All sections of the proposals shall be labeled with the same headings used in this RFP.

C. Evaluation Criteria

The Board of Directors of the Seniors Council of Santa Cruz and San Benito Counties shall appoint a Proposal Review Committee to assess the relative merits of the applications. The Committee will score each individual proposal and forward its funding recommendations to the AAA Advisory Council for comment prior to submitting the recommendations to the Board of Directors. The Board of Directors shall be the final authority in awarding the contract.

The Proposal Review Committee shall use the following criteria in ranking the proposals:

- | | |
|---|-------|
| 1. Effectiveness Of Meeting Priority Service Needs: | (25%) |
| 2. Cost / Cost-Efficiency: | (25%) |
| 3. Targeted Service Populations: | (15%) |
| 4. Service Delivery: | (30%) |
| 5. Miscellaneous: | (5%) |

3. SUBMITTAL DATE

The final date and time for 2025-29 service proposals to be received by the Seniors Council in order to be considered in this process is:

4:00 P.M., WEDNESDAY, FEBRUARY 18, 2025

The Seniors Council office is currently located at 234 Santa Cruz Ave., Aptos, CA.

Applicants will be required to submit by the deadline:

1 original printed proposal, with original signatures;

1 complete printed copy, including budgets, attachments and exhibits;

1 complete electronic copy of the proposal, in pdf format

2 additional printed copies containing only proposal narrative & budgets

Double-sided copies are encouraged.

Additional materials or documentation may be requested by the Proposal Review Panel. In such case, a reasonable amount of time will be allowed for the applicant to provide such information, within parameters of the review, recommendation and allocation process.

4. AWARD PROCESS TIMETABLE

**2025-2029
AREA AGENCY ON AGING
REQUEST FOR PROPOSALS TIMELINE**

November 2024

Nov 22 Availability of Funds and Letter of Intent (LOI) Notice released

December 2024

Dec 18 Deadline for Letters of Intent to be received - 3 p.m.

Dec 19 Board discusses LOI's received and next steps in RFP process, including content of competitive RFPs.
Board considers directing staff to begin contract negotiations for sole source categorial allocations based on letter of intent received and applicant status.
Board appoints an RFP review committee to guide next actions (*public meeting*)

January 2025

Jan 7 Staff issues Request for Proposals (RFP), containing approved proposal review timeline & proposal review criteria. Proposals distributed to interested applicants. (Tuesday)

Jan 14 Bidders Conference held. 2:30 p.m. at the Seniors Council Conference Room; 236 Santa Cruz Ave, Aptos, CA. Zoom option will be provided.

Jan 19 **AAA Advisory Council** receives updates on entire RFP status. AC appoints their representatives to the Proposal Review Panel representatives. (*public meeting*)

Jan 20 **Board of Directors** receives updates on entire RFP status Board makes final appointments of Proposal Review Panel members

including community representative(s), Advisory Council appointees, staff, and members of the Board of Directors.
(*public meeting*)

February 2025

- Feb 18** Proposals due to Seniors Council Office by 4 p.m. (Tuesday)
- Feb 19 & 20** Advisory Council & Board of Directors updated on RFP's received, and updates to the status of the entire process
- Feb 19-21** Staff checks all references included in proposals. Proposal Review Panel members read proposals & prepare draft individual evaluations, using established criteria.
- 2-28 – 3-11** Proposal Review Panel meets to discuss content of proposals.
(*closed session*)
- Proposal Review Panel conducts question-and-answer session with applicant agencies.
- Proposal Review Panel meets to make preliminary recommendations for award of contracts & funding levels.
(*closed session*)

March 2025

- Mar 14** Staff issues notice to all applicants regarding panel recommendations.
(*Friday*)
- Mar 19** **AAA Advisory Council** certifies process to date & reviews recommendations) (*public meeting*)
- Mar 20** **Board of Directors** reviews recommendations of Proposal Review Panel & Advisory Council.
Board receives comments from the public.
Board hears any inquiry, protest, objection or complaint about proposal review process.
Board makes preliminary decision regarding contracts & funding. (*public meeting*)

March 21 **Staff issues notice to all applicants regarding Board's preliminary decision & advises applicants of opportunity to appeal decisions.**

March 31 Final date for applicants to submit appeal of Board allocation decision

April 2025

April 1-14 Appeals Review Panel meets to hear any appeals.

April 15 Affected agencies notified of Appeal Panel results.

April 16 **AAA Advisory Council** reviews & approves funding recommendations & draft Area Plan objectives & certifies process to date. *(public meeting)*

April 17 **Board of Directors** Board hears results of Appeals Panel Recommendations (if any). Board gives final approval to service contracts, including terms & specifications,

April 21 Staff issues notice to all applicants regarding Board's final action.

May 2025

May 1 2025-2026 update to the 2024-28 Area Plan on Aging submitted to CDA.

May 14 **AAA Advisory Council** Regular meeting provided no adjustments are made to the RFP timeline. *(public meeting)*

May 15 **Board of Directors** Regular meeting provided no adjustments are made to the RFP timeline. *(public meeting)*

June 2025

Seniors Council staff issues contracts for service

5. DISQUALIFICATION OF APPLICANTS FOR INAPPROPRIATE CONDUCT

Any agency's application for service may be ruled ineligible by the Seniors Council Board of Directors as a result of conduct seen as inappropriate to the delivery of services to seniors. Special attention is drawn to the area of exerting undue influence on the RFP process. All applicants should review the following section and become familiar with it. If you have any questions regarding its interpretation, please contact the Seniors Council Executive Director (Clay Kempf) at (831) 688-0400.

Undue Influence:

The Seniors Council has established a process by which proposals are submitted requesting funding for services to meet identified senior needs. By the very act of submitting a proposal for funding, the applicant is hoping to influence the outcome of the proposal review and funding award process.

Proper attempts to influence the proposal review and funding award process will include those described in the Seniors Council's timeline and Request For Proposals. They will include, but not necessarily be limited to, attendance at a Bidders' Conference; request from Seniors Council staff for information or appropriate technical assistance; preparation and submittal of a proposal for funding; solicitation of a limited number of references for inclusion in the written proposal; attendance at open meetings at which the process or individual proposals are discussed; participation in a public session conducted by the Proposal Review Panel for the purpose of acquiring additional information; and participation at Advisory Council and Board of Directors meetings, at the discretion of the chairs.

"Undue influence" shall be defined by the Seniors Council as meaning any improper attempt to influence the Request For Proposals process, the impartial review of proposals, the recommendation of the Proposal Review Panel or the AAA Advisory Council, or the decision of the Seniors Council Board of Directors.

Undue influence is what any reasonable person would consider as an attempt to influence the recommendation or decision of an individual, based on some factor other than those set forth to be applied equitably to all applicants. It includes, but is not limited to, any constraint placed by an applicant or representative of an applicant organization upon a member of the Proposal Review Panel, the AAA Advisory Council, or the Seniors Council Board of Directors; any influence which deprives or attempts to deprive the individual influenced of his or her free agency; taking advantage of a person's weakness, infirmity or distress to change that person's actions or decisions; misuse of a position of confidence; threat; or action which would constitute or which is designed to create bias.

Applicants are advised that there will be negative consequences in response to any attempt to tamper with the process.

Disqualification of Applicants:

Any attempt by an applicant or anyone acting on behalf of an applicant organization, outside the established process of a written application and public meetings, to influence unduly the recommendation of the Proposal Review Panel or the AAA Advisory Council or the decision of the Board of Directors will be considered by the Board of Directors at its next regular meeting, or at a special meeting called by the President, and may constitute grounds for disqualification of the application for any consideration.

In the event a member of the Proposal Review Panel, the AAA Advisory Council, or the Seniors Council Board of Directors reports an attempt to apply undue influence, the nature of the violation shall be defined and clarified, either by the individual making the report or by the agency Executive Director. The Board of Directors will make a determination as to whether the violation was sufficiently serious to warrant disqualification of the applicant from consideration for funding. A negative decision by the Board may be appealed to the agency's Appeals Review Panel, whose decision shall be final at the local level.

General parameters to be used in considering disqualification of an applicant are as follows:

1. That the attempt to influence the process was intentional on the part of the applicant organization or a representative thereof.
2. If the attempt was carried out by someone other than the applicant organization or its official representative, that the applicant instigated the attempt or was aware of the attempt and did not take action to stop or discourage the attempt.
3. That a collection of circumstances exists, none of which by itself would constitute undue influence, but which collectively appear to establish a pattern intended to influence the funding decision.

6. AVAILABLE FUNDING

Funding offered in this RFP is based on estimates at this time. Final awards may be adjusted upwards or downwards depending on actual funds available at the time of contract execution. Current amounts are those listed in the previously released Letter of Intent.

The estimated funding excludes the minimum required local matching funds (which vary by title), and voluntary participant contributions for which all contracted service programs

must provide opportunity. Applicants need to identify their source of local match in their proposals.

A. Funding by County:

California's Planning and Service Area (PSA) #13 consists of San Benito and Santa Cruz Counties. Santa Cruz County has a long history of a wide array of services and programs benefiting older individuals. By contrast, San Benito County has historically had very few services supporting its senior population, particularly those with greatest social and economic need. It is the policy of the Seniors Council that at least one-fourth of available resources will be allocated to provide services in San Benito County. Applicants may request funds to provide services in either San Benito County or in Santa Cruz County or in both counties.

B. Basic Funding Categories And Definition Of Service Units:

Federal and state funds are awarded to the Seniors Council in specific service categories, each with clear definitions of what qualifies as a legitimate unit of service. The funds available in this RFP are part of Title III-B Supportive Social Services, Title IIIC-1 Congregate Nutrition, Title IIIC-2 Home-delivered Meals, and Title IIIE Family Caregiver Support Program.

7. APPEAL PROCESS

An applicant agency wishing to challenge the decision based on procedural misconduct by the Seniors Council or its appointed committees must do so in writing by the dates listed on the enclosed RFP timeline. Contact Seniors Council staff for a copy of the Appeal Form. Appeals (if any) will be reviewed according to the RFP Timeline.

8. REQUIREMENTS & ASSURANCES

Included in the attachments is a list of Requirements and Assurances to be performed during the duration of the program operation. The signature of the Agency's Executive Director or Board President committing to these articles is required.

9. FUNDING CONTINGENCY PLANS

All funds are subject to change as related to funding changes in state and federal allocations to Older Americans Act Programs. Adjustments to these funding allocations shall be made on the following basis:

- 1) Initial awards will be based on the Seniors Council's best estimate of available funds at the time the Proposal Review Panel meets;

- 2) Decreases to available funding will be adjusted equally among all selected providers within a funding title to the maximum extent possible, unless regulations prevent the Seniors Council from transferring funds between categories.
- 3) Additional funding is sometimes available due to state or federal budget action, pandemic response funding, or other sources. Existing contractors will be made aware of any opportunities to apply for supplemental funding.

10. NUTRITION INFRASTRUCTURE

Applicants for Senior Nutrition Programs must describe their plan for kitchen location and use, and delivery system for food and meals.

Additional funds for new nutrition program infrastructure such as kitchen equipment, delivery vehicles, dining center tables, etc. are not expected to be available. Equipment purchased using AAA funding in the previous funding cycle may be available to the successful applicant.

11. CONTRACT PERIOD AND POTENTIAL RENEWAL

Within the contract cycle of 2025-29, contracts will be awarded in one-year increments. Contracts for 2025-2029 are expected to be issued in June of 2025, pending the passage of California's budget and the allocation of contract funds. They will become effective July 1, 2025 and -- unless otherwise noted or terminated for cause or other circumstances prior to the end of the fiscal period -- expect to be renewed annually until June 30, 2029.

The Seniors Council Board of Directors retains the right to terminate a contract mid-year for cause, or not to renew a contract at the end of the one-year period without cause. However, it is the intent of the Seniors Council -- barring a significant change in the amount of federal and state funds available to the Seniors Council, or barring a change in the needs of local seniors -- to renew for two additional one-year periods those contracts awarded in 2022-23, except where the contractor has failed to adhere to the terms of the contract.

12. **PROPOSAL NARRATIVE**

Complete the following Proposal Narrative. The Seniors Council recognizes the great variety among potential applicant agencies, and acknowledges this organizational diversity by not restricting the length of your narrative response. However, the Seniors Council strongly encourages brevity, and far prefers clarity over verbosity and volume.

Applicants applying for assorted Title IIIB funds are encouraged to label responses that apply to only one funding type under a separate header within that section. For example, responses for Information & Assistance should be clearly demarcated from Case Management.

A. TYPE OF SERVICE:

1. Complete the Proposal Cover Sheet Form (included in the packet as Attachment 2)
2. Project Summary: Please provide a one-to-two page narrative summary of your proposal, briefly describing your agency and the services to be provided. For agencies applying for more than one program, submit a separate page for each.

B. EFFECTIVENESS OF MEETING PRIORITY SERVICE NEEDS: (25%)

1. Describe the geographic area to be served by proposed services:
 - ☐ Both San Benito and Santa Cruz Counties
 - ☐ San Benito County
 - ☐ Santa Cruz County
 - ☐ Portion of one county: _____
2. Does your agency, organization or business now provide services in San Benito and/or Santa Cruz County? If so, please describe the services being provided, and how long they have been provided services in the area.
3. What process will you use to identify the needs of seniors in the community to be served?
4. Describe how the program(s) proposed in this application address(es) the following needs of local older people:
 - (a) Support to remain independent at home, including housework

- (b) Maintaining or improving health access and health status for older adults and/or people with disabilities.
 - (c) Economic Security: income protection/maintenance to meet essential needs
 - (d) Food Security
 - (e) Transportation, including transportation-related expenses
 - (f) Decreasing social isolation and depression
 - (i) Access to services: Knowing what services are available, getting linked with services, and navigating systems of care.
5. Does (do) your proposed program(s) foster participant independence and/or enable people to live at home? If so, please describe how it does so.
6. How does (do) your proposed program(s) enhance the quality of life for participants?
7. Does (do) your proposed program(s) result in any financial benefit to participants? If so, in what way? How much financial benefit?
8. How do you measure the effectiveness of your program in meeting specific needs?

C. COST / COST-EFFICIENCY: (25%)

Numbers provided in Section C must be consistent with the budget submitted. As with other sections of this RFP, if you have questions regarding the forms or the application, feel free to contact AAA staff.

1. Cost per Service Unit: Delineate the service categories proposed in this application, the service activities and specific proposed number of service units. For each service category, list the cost per unit of service to be delivered, delineating total cost per service unit, and amount per service unit that is funded by Seniors Council/AAA.
2. Total Funds Requested: Show the amount of Seniors Council/AAA funds requested, and the sources and amounts of other funding to be used in carrying out service delivery. Describe the sources of additional (non-AAA) funds and how and why you expect to receive them.
3. Administration: What percent of total funding will be allocated for administration and what percent for direct service provision? If that percentage differs from the rest of the agency, what is the agency-wide percentage? *Failure to list any administrative expenses will result in a negative score.*
4. Non-duplication of services: Describe how your organization works with the community and other service providers to avoid duplication of services.

5. **Paid staff:** Describe the paid positions and hours of each involved in delivery of these services at the proposed levels. Provide summary resumes for key personnel in your agency, including their human service experience. *Include an agency and/or program organizational chart.*
6. **Use of volunteers:** Describe your agency's use of volunteers, including number of volunteers, hours donated, duties performed, and training provided, etc.
7. **Project Budget:** Submit a complete program budget and budget narrative, using the forms in the Attachment 5 or a computer-generated facsimile.

D. TARGETED SERVICE POPULATIONS: (15%)

Describe your agency's outreach and targeting ability to reach populations typically disenfranchised from service. Include past performance, percentages to be served, and methods used to ensure success. ***Include efforts to reach each of the following categories:***

1. Low-income seniors:
2. Ethnic minority seniors:
3. Seniors with limited-English Proficiency;
4. Frail elderly and individuals with disabilities:
5. Rural or otherwise isolated individuals:
6. Persons with Alzheimer's disease or related disorders (and their caregivers);
7. Gay, lesbian, bi-sexual and/or transgendered seniors;
8. HIV+ seniors;
9. Other specific groups your agency targets, such as those at risk of institutionalization, homelessness, etc.
10. If necessary, how will program capacity limitations be managed, and what prioritization criteria will be used to manage participant waiting lists?

E. SERVICE DELIVERY: (30%)

Use this section to describe the effectiveness of the services your agency provides. Answer each sub-category, addressing the issues listed and/or any others that are relevant to the topic.

1. Accessibility: Describe how seniors are able to access your services, including available transportation, wheelchair accessibility, language & vision accommodations, physical relevance of location, items of cultural interest, provision of in-home services, etc.
2. Involvement of participants and the community: Outline how service recipients and the community provide feedback into the operation of your program. Include the background of your Board of Directors and any relevant advisory councils or committees, participant feedback or evaluations forms, process for policy changes, or other involvements of participants in the program(s) operations.
3. Participation in Community-based System of Care: Describe the agency's history and future plans regarding its participation in local community systems of care. List agency participation on local commissions or other committees or advisory bodies related to senior services, coalitions of senior care which you are a part of, and any organized advocacy efforts affecting seniors which your organization feels would enhance your ability to deliver services in your service area.
4. Program Infrastructure & Location: Tell us where the central location is from where services originate and are delivered? Describe the offices, kitchen(s), mealsites, classrooms, or other locations to be used, and the stability or alternate plan for such locations should they be subject to change. Describe the days of operations for each program component.
5. Describe program operations in detail here, as appropriate for the services being offered (see scope of work for details). Include roles performed by volunteers

Congregate Nutrition Programs

What activities (if any) will be provided as part of the congregate meal program? How are menus developed, and by who? Will advance reservations be required? What activities will take place as part of the mealsite?

Use this section to expand on how your **mealsite transportation services** will function if that is part of your application.

Home Delivered Meals

Include often will meals be delivered to program participants; how eligibility will be determined, whether hot or frozen meals be provided, how the meals are delivered, etc.

Family Caregiver Support Program

Please describe specifics regarding the services that will be offered under each of the Title III-E service categories, and why the proposed services were selected (i.e, services not currently available; expansion of existing services, etc.). At least one service must be included in each of the five categories show in bold.

Caregiver Access

Caregiver Case Management

Caregiver Information & Assistance (includes Outreach)

Caregiver Information Services

Information including Community Info & public ads

Caregiver Support Services

Caregiver Training

Caregiver Support Groups

Caregiver Counseling

Caregiver Respite Care

Respite in-home

Respite out of Home (day)

Respite out of Home (overnight)

Respite: Other

Caregiver Supplemental Services

Caregiver Legal Consultation

Caregiver Consumable Supplies

Caregiver Home Modifications

Caregiver Assistive Technology

Caregiver Other: Assessment

Caregiver Other: Caregiver Registry

F. MISCELLANEOUS: (5%)

Describe any other factors which especially qualify your organization to provide services to seniors under contract with the Seniors Council.

1. Provide information about any outstanding attributes of your organization in general, your structure, or your personnel.
2. Provide information about any outstanding elements of your organization's experience.
3. Describe anything else you think may help your application.



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: 3-13-25

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: Executive Director's March Report

MASTER PLAN FOR AGING (MPA) & SOLUTIONS SUMMITS

Solutions Summit workgroups 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 I'll be sharing the rough outline of the Playbook and the survey at their 3/14/25 meeting, and encouraging their input. The Santa Cruz County Governance Committee, however, hasn't met for some time, and is undergoing some transitions. County Supervisors Zach Friend and Bruce McPherson are no longer in office, and staff from the City of Santa Cruz have changed. The makeup of the Governance Committee is quite varied, ranging from City Managers to County Supervisors to Parks & Rec staff, depending on the jurisdiction. Lack of continuity is a concern. I'm told that Supervisors McPherson and Friend briefed their successors (Monica Martinez and Kim DeSerpa) about the effort and encouraged them to fill the now vacant roles.

Santa Cruz County staff is expecting to write the Santa Cruz County version of the Local Playbook. In San Benito County, I'm expecting it to be a group effort, led by our agency and the staff that have been facilitating the effort, with significant input from all of our partners, and especially the Community Foundation for San Benito County.

AGENCY OPERATIONS

We've moved, as of March 3! Everyone is happy with our new location, although we're still unpacking and arranging various office configurations, wall hangings and other details.

175 Westridge Dr., Watsonville, CA. 95076 **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, PRIVATE FOUNDATIONS, THE UNITED WAY, AND YOUR PERSONAL DONATIONS

9-1

Continuing our Solutions Summit/Master Plan for Aging work and conducting the RFP Process that we're discussing at today's meeting both are consuming a lot of our time, and fiscal has been swamped by not one, not two, but THREE audits, some of which extend over four months (and counting). Our Finance Committee will report out on those efforts, and of course we'll be receiving our Independent Financial Audit Presentation earlier in the meeting.

On the heels of the CDA Audit, the Department of Aging will soon be starting their Program Monitoring Review of our organization, which, of course, include substantial monitoring of our fiscal operations. The main focus of the Monitoring Team is to monitor how we monitor our contracted service providers, but is not supposed to include any actual monitoring of the providers themselves. That's rarely the case however, as it's admittedly difficult to measure our monitoring of providers without involving the provider agencies. The CDA Monitoring will expect to interview the President of our Board of Directors and the Chair of our AAA Advisory Council.

Despite this avalanche of oversight and review, we continue to receive excellent reviews and rank high among our peers in terms of fewer findings and corrective actions.

STATE & COMMUNITY ACTIVITIES

Our Advocacy Committee report provides a general overview of some of the topics we're working on with our various partners in the community. Those partners include numerous local organizations that address not just the needs of older adults, but of vulnerable people through all age groups. Strength in numbers has always been part of our philosophy.

The California Association of Area Agencies on Aging has accepted our request to pro-rate our membership renewal and charge us only one-third of annual dues as we rejoin the state association. I'm looking forward to working with Christina Mills, C4A's new Executive Director, but an old friend of ours. I'm hoping some of our other staff can attend some of the C4A meetings as there isn't much available capacity in my schedule to take on additional meetings.

California's Master Plan for Aging San Benito County's Local Playbook

CALIFORNIA'S MASTER PLAN FOR AGING

OVERVIEW

Executive Summary (also make available as separate document)

Background

Five Bold Goals

State Implementation Plan

Regular Updates

Local Playbook Activities

Age Friendly Communities

THE SAN BENITO COUNTY LOCAL PLAYBOOK

Planning and Partners

The Aging & Long Term Care Commission

Solutions Summit

Five Bold Goals Workgroups (participants, actions, challenges, future success?)

California Department of Aging Survey Data

Statewide LADAP Group

Recommendations, Actions, and Future Actions (SMART Goals for each)

Housing for All Ages and Stages

- State Goals and Challenges
- Local Strategic Ideas (from Solutions Summit and other Community Input)
- Community Projects Underway
- Strategic Ideas for the future
- Tools and Champions (and potential champions)

Health Reimagined

- State Goals and Challenges
- Local Strategic Ideas (from Solutions Summit and other Community Input)
- Community Projects Underway
- Strategic Ideas for the future
- Tools and Champions (and potential champions)

Inclusion & Equity

- State Goals and Challenges
- Local Strategic Ideas (from Solutions Summit and other Community Input)
- Community Projects Underway
- Strategic Ideas for the future
- Tools and Champions (and potential champions)

Caregiving That Works

- State Goals and Challenges
- Local Strategic Ideas (from Solutions Summit and other Community Input)
- Community Projects Underway
- Strategic Ideas for the future
- Tools and Champions (and potential champions)

Affording Aging

- State Goals and Challenges
- Local Strategic Ideas (from Solutions Summit and other Community Input)
- Community Projects Underway
- Strategic Ideas for the future
- Tools and Champions (and potential champions)

NEXT STEPS

Where does it live in the Future?

Who's responsible? (shared by community)

How can the effort be sustained?

Crossover items (e.g. Engagement & Health; Transportation, Income, Housing, etc.)

Action Summary? A bulleted list of priority projects?

CONCLUSION?

APPENDICES

- Needs Assessment(s)
- Age Friendly Communities and Local Age-Friendly Scores
- Solutions Summit Attendees & Agenda
- Solutions Summit Workgroup Attendees



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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.

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 Manzana 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, 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



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PROJECT SCOUT

End of February 2025 Report

Project SCOUT has started tax season 2025 in full force. This are the following sites providing weekly services.

2025 Tax Prep Sites*

1. Project SCOUT Facilitated Self Assistance ALL Online: <http://tinyurl.com/SCOUTFSA>
2. Project SCOUT TCE ALL (Remote and ad-hoc for at-risk seniors and disabled)
3. Highlands Park Senior Center Ben Lomond (Wed and Thurs 10:00-1:00)
4. Felton Public Library (Saturdays 10:00 - 1:00)
5. Santa Cruz Public Library Downtown (Tues and Sat 10:00-3:00)
6. London Nelson Community Center Santa Cruz (Thurs 9:30-12:30)
7. Market Street Senior Center Santa Cruz (Wed 1:30-3:30) Walk-in
8. Mid-County Senior Center Capitola (Wed 9:00-12:30)
9. Capitola Public Library (Wed 2:00-5:00)
10. Aptos Library (Tues 10:00-1:00)
11. La Manzana Community Center Watsonville (Tues 9:00-2:00)
12. Watsonville Public Library (Wed 2:00-7:00) Walk-in
13. Watsonville Senior Center (Wed 10:00-1:00) Walk-in
14. Jovenes de Antano (Pauline Valdivia Memorial Center) Hollister (Wed 2:00-7:00)

Ad-Hoc Events in February (All by appointment ONLY)

1. La Posada Retirement Community Santa Cruz
2. Tacos and taxes with Robert Rivas's Office @ Jovenes de Antano February 28th 2025

10.1-3

Project SCOUT February Tax Production Totals

Project SCOUT Volunteer Income Tax Assistance Tax Preparation Totals:

- Number of Federal returns prepared – 835
- Dollar Amount of Federal refunds including credits – \$775,909.00
- Dollar Amount of State refunds including credits – \$190,583.00
- ITIN Count – 22

Dollar Amount of TOTAL refunds – **\$966,492.00**

Total money back in the wallets of our clients, including average return cost of \$240.00 – **\$1,166,892.00!**

Calfresh Services

Primarily due to the time needed for tax season and everything involved with it, Calfresh services for seniors and disabled are offered to those requesting the service during this season, and little to no outreach will be performed until the end of tax season.

- Number of Senior and disabled clients assessed for services – 5 (4 SCC, 1 SBC)
- Number of clients assisted with Calfresh in Santa Cruz County – 3
- Number of clients assisted with Calfresh in San Benito County – 0

February 2025 Recap

Challenges:

The loss of our Program Coordinator on January 31st could have left a massive void to programmatics. Without proper support, everything from funding, to volunteers, to services, hence the whole program, is placed at risk. This has been a recurring issue for Project SCOUT; In the line of work we do it is imperative that we bring in staff that are not only able, but are willing to do the work necessary for the program and community.

Our necessary move of offices during the start of tax season and carrying on through February made it impossible to offer services on what had been our highest producing site at our now defunct Aptos office. Furthermore, it made our coordination and ability to oversee all aspects of the program more difficult.

Recent changes in government and possible funding freezes or defunding of programs servicing communities like those we serve, primarily when DEI is taken into account, has proven to be a juggling act of reporting processes and bureaucracy, with no difference to services being provided from our end.

10.1- 4

On the receiving end, the immigrant populations that we assist face anxiety and many are deferring from filing taxes and applying for programs such as CalFresh, as possibly illegal measures of intra-governmental information sharing are being spoken about in the media and others. Whether accurate or not, mis/information travels like wildfire, and some in our communities are opting out.

Best Practices:

Project SCOUT excitedly brought on board Heidi Fraser in January, our new Program Coordinator with not only ample phone assistance experience, but a former Project SCOUT volunteer who knows and gets the program and what we do. She has been a boon to our program and services, and provided the Program Director more time to focus on grants, grant management, funding, and service oversight.

Project SCOUT's scope of services and reach is growing, and the word of what we do is getting to the ears of those in places of power in our communities. On February 28th, with the assistance of one of our funding partners (Golden State Opportunity), we held our third "Tacos and Taxes" in Hollister in partnership with the Speaker of the House Robert Rivas's Office to a resounding success! On this day alone 49 taxpayers were assisted with tax preparation and over 75 taxpayers total with others such as tax related questions and appointments.

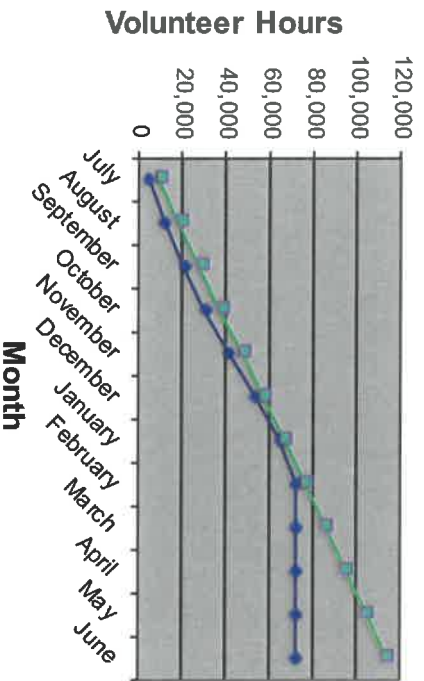
Project Name: Seniors Council Foster Grandparent Program

Grant Year: 7/1/24- 6/30/25

Month	Cumulative		Monthly		Monthly		Monthly		Monthly		FY 23-24		Annual	
	Hours	Goal	VSYS	Goal	Hours	Actual	Vols.	Actuals	Goal	VSYS	Actuals	Goal	VSYS	Goal
July	5,316	9,483	5.09	9.08	5,316	124	4,976	109						
August	12,312	18,966	6.70	9.08	6,996	120	5,585	109						
September	21,105	28,449	8.42	9.08	8,793	118	6,893	109						
October	30,539	37,932	9.04	9.08	9,434	116	7,363	109						
November	41,484	47,415	10.48	9.08	10,945	115	10,355	109						
December	53,749	56,898	11.75	9.08	12,266	116	12,862	109						
January	64,528	66,381	10.32	9.08	10,779	117	10,827	109						
February	72,045	75,864	7.20	9.08	7,517	120	7,179	109						
March	72,045	85,347	0.00	9.08			10,382	109						
April	72,045	94,830	0.00	9.08			10,621	109						
May	72,045	104,313	0.00	9.08			8,487	109						
June	72,045	113,796	0.00	9.08			5,739	109						
TOTAL			69.01		72,045		101,267							

Total VSYS
Achieved

VSYS Actual to Target (Cumulative)



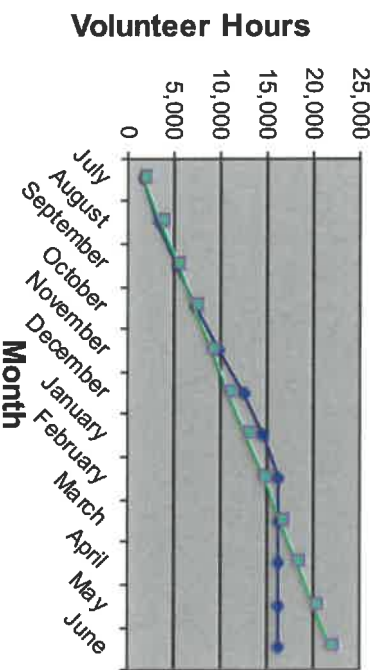
10.2-1

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

Month	Cumulative		Monthly		Monthly		Monthly		Monthly		Annual	
	Hours	Goal	VSYS	VSYS	Hours	VSYS	Hours	VSYS	Volts.	FY 23-24	VSYS	Goal
July	1,837	1,827	1.76	1.75	1,837	1.837	29	1.540	21			
August	3,444	3,654	1.54	1.75	1,608	29	1,312	21				
September	5,353	5,481	1.83	1.75	1,909	29	1,640	21				
October	7,408	7,308	1.97	1.75	2,055	31	1,691	21				
November	9,911	9,135	2.40	1.75	2,504	31	2,498	21				
December	12,525	10,962	2.50	1.75	2,614	30	3,189	21				
January	14,684	12,789	2.07	1.75	2,159	30	2,485	21				
February	16,307	14,616	1.55	1.75	1,623	33	1,802	21				
March	16,307	16,443	0.00	1.75			2,516	21				
April	16,307	18,270	0.00	1.75			2,522	21				
May	16,307	20,097	0.00	1.75			1,940	21				
June	16,307	21,924	0.00	1.75			1,787	21				
TOTAL			15.62		16,307		24,921					

Total VSYS
Achieved

VSYS Actual to Target (Cumulative)





ADRC of San Benito County Staff Report - March 2025

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 has been working with local partners to begin the process of developing a Local Playbook as part of the Governor's Master Plan for Aging (MPA). Solution Summit follow-up work, such as the convening of workgroups focused on prioritizing local activities and actions to create solutions for locally identified aging, disability, and caregiver needs, will guide and form the basis of the recommendations and activities put forth in San Benito County's Local Playbook, the writing and draft formatting of which is already underway!

ADRC Core Services Staff, Leanne Oliveira, Sandy Castro, and Kaitlyn Amador, along with Special Projects Director, Britt Bassoni, continue to collaborate around sharing ADRC-related responsibilities, making and receiving local consumer referrals, resources sharing, training and support needs, and the mechanics of program data collection and services reporting. Most recently, discussions have taken place around planning and systems needs related to the upcoming submission of mandatory FY25/ADRC contract documents to CDA, including a Program Budget, Budget Narrative, and Annual Plan.

With regard to the ADRC Annual Plan, CDA has revised the plan somewhat significantly for FY 25/26. The plan, due April 30th, asks for plans and strategies across nine (9) pre-selected areas deemed core to all ADRC development efforts. These areas are as follows:

- Leadership m& Governance
- Outreach & Marketing
- Person-Centered Practices
- Standardized Processes & Procedures
- Quality Review & Improvement
- Core Service Functions
- Sustainability
- Training & Staff Competencies
- Information Technology/Security

In addition to also asking for a description of planned activities, milestones, measurements, and results supporting these plans, CDA will ask for an assessment of related accomplishments at the close of the fiscal year. These changes represent a renewed State focus on both accountability for the expenditure of local funds, as well as an interest in having ADRCs begin to look and behave more similarly, or at least focus on the same critical developmental components for the work in which we are engaged. This is good for our local development on many levels, and also difficult in being able to bring resources to bear across all areas, collectively and thoroughly, throughout the service year.

Our local ADRC sees these changes as an opportunity to simplify and consolidate many previous year's plans and strategies, with the thinking that perhaps it is better to do a few things really well than many things only adequately. The ADRC Leadership Team will be working over the next several weeks to put together a draft plan and associated activities and measures, in preparation for submission April 30th.

ADRC Staff continue to work 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.

Along with stable, safe, and affordable housing, the biggest unmet or under resourced need which Core Service Staff continue to encounter is isolation, help at home, and navigation and services access. The ADRC-NWD Core Services Team continue to work collaboratively to meet these needs, information share, and provide referrals to resources among the ADRC's Extended Partners and other community service organizations. We are preparing for the publication of a newly updated edition of the San Benito County Aging & Disability Resource Directory for FY25/26, and will continue to keep digital versions of the Directory - - in both English and Spanish - - available on-line and in printable form, in whole or by section, there on the site.

Another reminder that the ***San Benito County Connect – Neighbor to Neighbor Volunteer Network*** program website has launched at www.sbcvolunteers.org. Register there to find opportunities to serve in your community, or tell organizations with whom you work about the site and encourage them to post their volunteer service opportunities there. Community volunteerism makes communities stronger and more resilient, and creates opportunities for everyone to do their part.

Are you an older adult who would like to learn how to protect yourself from scams?

Attend this workshop to learn effective ways to protect and empower yourself.

Volunteer Center AmeriCorps Seniors and Village SCC have partnered with Shandra Handley from County of Santa Cruz Consumer Fraud Unit to provide a scam and fraud prevention workshop for older adults.

When: March 28

Where: Community Foundation of Santa Cruz County, 807 Soquel Dr, Aptos, CA from 11am-12pm

Additional Details: The workshop will be presented in a hybrid format and have a limited number of in person seats for those who pre register. Attendees can also attend via Zoom.

Call or email today to reserve your in person or Zoom seat!

Contact: Ares Wakamo at ares.bartell@scvolunteercenter.org or 831-427-5070

Shandra (pictured here) with her team, has worked for the County of Santa Cruz since 2016. She loves doing community outreach and educating the public on ways they can protect themselves.



Volunteer Center 11.1-1
of Santa Cruz County

Press Release



**Jovenes
De Antaño**
Senior Center
1992

FOR IMMEDIATE RELEASE

Contact: Danny Barrera Jr
Executive Director, Jovenes De Antaño
Phone: (831) 637-9275
Email: d.barrera@jdaseniors.org
Website: www.jdaseniors.org

Jovenes De Antaño Faces Critical Funding Loss as Transportation Contract Goes to Out-of-State Corporation

Community Support Urgently Needed to Keep Senior Services Alive in San Benito County

HOLLISTER, CA – Thursday March 6, 2025 – Jovenes De Antaño, a nonprofit organization that has provided essential services to seniors in San Benito County for over 50 years, is facing an alarming financial crisis after losing a critical Specialized Transportation contract to Transdev Services Inc., an Illinois-based company. This decision means local tax dollars are being sent out of the county, jeopardizing key services like Meals on Wheels, congregate lunches, and transportation for seniors who depend on these programs.

"This is more than just a funding loss," said Danny Barrera Jr, Executive Director of Jovenes De Antaño. "It's a loss of trust, a loss of stability, and a loss of essential care for the seniors in our community. For decades, we have ensured that our elders have access to hot meals, reliable transportation, and social programs that combat isolation. Now, these services are at risk."

A Troubling Pattern: Local Dollars Leaving San Benito County

The loss of the transportation contract is just one part of a growing issue. The organization's nutritional programs are also up for renewal, and funds meant for San Benito County are now being directed to Martha's Kitchen, a meal provider based in San Jose.

San Benito County has long faced challenges in securing fair funding from government agencies and major corporations, which tend to prioritize large metropolitan areas like San Jose, San Francisco, and Los Angeles. This latest decision continues a troubling trend of outsourcing local services to out-of-town corporations instead of investing in community-based nonprofits with a proven track record of success.

11.2-1

Press Release



**Jovenes
De Antaño**
Senior Center
1997

The Urgent Need for Community Action

Jovenes De Antaño is now calling on community members, local businesses, and government leaders to take immediate action to prevent further loss of services. Without urgent financial support, programs that seniors rely on every day could be drastically reduced or eliminated.

The organization is requesting:

- **Emergency donations** to sustain Meals on Wheels, transportation, and senior center programs.
- **Media support** from local news outlets such as Benito Link and KSBW to spread awareness.
- **Financial assistance** from the City of Hollister and County of San Benito to protect local senior services.
- **Advocacy** from elected officials, including Senator John Laird, Congresswoman Zoe Lofgren, and Speaker Robert Rivas, to fight for fair funding for San Benito County.

How You Can Help

- **Donate Today:** Every dollar helps keep our seniors fed, connected, and cared for. Contributions can be made at Jovenes De Antaño's website or by calling (831) 637-9275.
- **Raise Awareness:** Share this urgent issue with your networks and encourage others to support local nonprofits.
- **Contact Local Leaders:** Urge city, county, and state officials to prioritize funding for community-based senior services.

"For decades, we've taken care of our seniors," Danny Barrera Jr emphasized. "Now, we need our community to take care of us. Together, we can ensure that San Benito County's seniors are not left behind."

About Jovenes De Antaño

Jovenes De Antaño is a nonprofit organization dedicated to serving the seniors of San Benito County through Meals on Wheels, transportation services, social programs, and other essential services. Since its founding, the organization has been a trusted resource for seniors, ensuring they receive the care and support they need to live with dignity.

For more information, donations, or media inquiries, please contact:

Danny Barrera Jr

Executive Director,

Jovenes De Antaño

Phone: (831) 637-9275

Email: d.barrera@jdaseniors.org

11.2-2

Press Release



**Jovenes
De Antaño**
Senior Center
Est. 1975

FOR IMMEDIATE RELEASE

Contact: Danny Barrera Jr
Executive Director, Jovenes De Antaño
Phone: (831) 637-9275
Email: d.barrera@jdaseniors.org
Website: www.jdaseniors.org

Update on Specialized Transportation Services – Jovenes De Antaño

HOLLISTER, CA -Wednesday, March 12, 2025 -We want to take a moment to clarify the status of our Specialized Transportation services following recent news about our contract. While Jovenes De Antaño did not have our contract renewed for future years, we will continue providing Specialized Transportation services through December 2025, or until our current contract is officially canceled or expires.

This means seniors and disabled individuals who rely on our transportation services will continue to receive them for the time being. However, we are facing serious challenges, including staff shortages and a critical lack of vehicles.

Limited Vehicles, Ongoing Commitment

Currently, the Local Transportation Authority (LTA) is responsible for providing specialized vehicles for us to operate. Unfortunately, we have only been provided with one van to serve the entire county. Additionally, we have two buses that require a commercial driver's license with passenger endorsement, which limits the number of available drivers.

We want to assure our community that Jovenes De Antaño remains committed to serving our seniors—whether or not we have government funding. However, with just one van covering all of San Benito County, we ask for the community's patience and understanding as we work through these challenges.

How You Can Help

We are actively applying for additional grants and funding sources, but we urgently need support from our community. You can help by:

- **Making a Recurring Monthly Donation:** Visit our website at Jovenes De Antaño and set up a monthly contribution to help us sustain services.
- **Spreading the Word:** Share this message with friends, family, and neighbors to help raise awareness.
- **Advocating for Local Support:** Encourage local leaders and businesses to support senior services in San Benito County.

We have served this community for over 50 years, and with your help, we will continue to do so for many more. Thank you for your understanding, patience, and generosity as we navigate this difficult transition.

11.2-3



CHAMBER MEMBER EMAIL TAKEOVER

11.2-4



**Jovenes
De Antaño**

Senior Center

Est. 1975

CALL TO ACTION

Jovenes De Antano

(831) 637-9275

**P.O. Box 860
Hollister CA 95024**

**Donate Online:
www.jdaseniors.org**



**Help Save Our
Senior Center**

**MEALS ON
WHEELS**

**SENIOR LUNCH
PROGRAM**

**SENIOR
TRANSPORTATION**

**JOVENES DE ANTANO HAS BEEN A LOCAL NONPROFIT
FOR 50 YEARS BASED IN SAN BENITO COUNTY**

For over 50 years, **Jovenes De Antaño** has been a pillar of San Benito County, ensuring that our most vulnerable seniors receive the essential services they need—hot meals, transportation, social activities, and critical support programs. However, we are now facing an unprecedented crisis that threatens to dismantle these vital services.

Just this week, we received heartbreaking news: **our long-standing Specialized Transportation contract of 45 years has been awarded to Transdev Services Inc., a company based in Illinois.** This decision marks a devastating loss, not just for our organization, but for every senior who depends on our transportation services to get to medical appointments, grocery stores, and social gatherings.

This contract has been a crucial funding source that has helped support not only transportation but also our **Meals on Wheels program, Senior lunches, and senior center activities**, including exercise and computer classes, support groups, and even an Alzheimer's daycare center in the past. Without these funds, our ability to provide these services is now in jeopardy.

A Troubling Trend: Outsourcing San Benito County's Future

This is not an isolated incident. **Our nutritional programs are also up for renewal, and the Senior's Council of Santa Cruz has decided to outsource San Benito County's meal funding to Martha's Kitchen, a San Jose-based provider.** The pattern is clear—local dollars are being sent out of our county, taking crucial services away from the very people they were meant to support.

We've seen this before. **Major corporations, funding sources, and even government agencies prioritize big metropolitan areas like San Jose, San Francisco, and Los Angeles, leaving rural counties like ours struggling to compete for the same opportunities.**

This trend is unsustainable. It is unjust. And it is hurting our community.

The Cost of Losing Local Services

When out-of-town corporations take over local services, we don't just lose jobs—we lose connection, trust, and the deep-rooted commitment that only a community-based organization can provide. We lose the personal touch of a Meals on Wheels driver who knows each senior's needs. We lose the familiar faces at our senior center who provide more than just meals—they provide companionship and security.

With the loss of this funding, we are now facing **tough decisions**. Will we have to reduce meal services? Will we be forced to cut back on transportation for seniors who rely on us to get to life-saving medical appointments? Without urgent action from our community, these devastating cuts could become a reality.

We Need Your Help – Now More Than Ever

We are calling on **our community, our leaders, and our local businesses to step up and help us save Jovenes De Antaño.**

We are asking for **immediate donations** to sustain our programs while we fight to keep local dollars in San Benito County. We are also asking for **media outlets, elected officials, and community foundations to amplify our message** and help us rally the support we need. Please consider posting the attached flyers on your social media accounts and email your network of supporters to help rally support for our local seniors.

We urge:

- **The City of Hollister and the County of San Benito** to commit emergency funding to support our programs.
- **The Community Foundation for San Benito County** to encourage local philanthropy to keep seniors fed and mobile.
- **Benito Link, KSBW, and other media partners** to cover this urgent crisis and highlight how the community can help.

- **Senator John Laird, Congresswoman Zoe Lofgren, and Speaker Robert Rivas** to stand up for San Benito County and demand fair treatment for our rural community.

Our seniors built this community. **They deserve better.** They deserve to be cared for by the people who know and love them—not by out-of-town corporations with no stake in our community's well-being.

How You Can Help

1. **Donate Today:** Every dollar makes a difference. Visit Jovenes De Antaño's website or call (831) 637-9275 to contribute.
2. **Spread the Word:** Share this message on social media, email it to friends, and tell your neighbors.
3. **Call Your Leaders:** Ask your city, county, and state representatives to fight for local funding to stay in San Benito County.
4. **Volunteer:** If you can give your time, we need more hands than ever.

San Benito County's seniors have always been here for us. Now, **it's our turn to be here for them.**
Jovenes De Antaño is not giving up—but we need our community to stand with us.
Will you answer the call?

Questions? Contact Us
(831) 637-9275

NONPROFITS

Jovenes De Antaño seeking community support amid funding uncertainty

The nonprofit has historically been the only bidder on two major funds for senior services.

by **Noe Magaña**
March 12, 2025



Seniors socialize during Jovenes De Antaños' senior lunch. Photo by Noe Magaña.

Lea este artículo en español [aquí](#).

About 40 seniors share daily meals at the Pauline Valdivia Memorial Community Center in Hollister. Over half of them stay a little longer to play bingo. Observing the environment of companionship and laughter, one would not know the organization providing those services faces an uncertain future as it expects to lose two of its major funding sources.

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Lupe Amaya, 79, has been going to the center for six years to be around other people.

“We get older and most of us are retired and we don’t have anywhere to go, nothing to do” she said. “This is good— to come here and hear other people, laugh and talk and play bingo.”

Amaya said she doesn’t mind if another organization takes over the program and the meals are offered at a different site as long as the services remain. However, she acknowledged that transportation can be a challenge for some seniors as some are picked up and dropped off by Jovenes De Antano while others use County Express, the area’s public transportation.

Jóvenes De Antaño, a nonprofit, has been providing and delivering lunch to seniors in San Benito County through funding from the Seniors Council of Santa Cruz and San Benito Counties. This year’s available funding is \$337,000. Historically, Jovenes De Antaño has been the lone bidder for the contract, but this year San Jose-based nonprofit Martha’s Kitchen also applied for the funds.

Jóvenes De Antaño Executive Director Danny Barrera Jr. said he believed his application would not be selected by the Seniors Council because Martha’s Kitchen is “much larger and has more resources.”

“We can’t compete with the large influx of resources Martha’s Kitchen has and Jovenes has to make do with what we have in front of us,” he said.

Jovenes De Antano said that in addition to potentially losing the food services contract, the organization was notified by the San Benito County Local Transportation Authority (LTA) that its evaluation panel will recommend its board to award a contract for specialized transportation to Illinois-based Transdev Services. According to a news release, it has received funds for 45 years from LTA to provide local seniors and people with disabilities with transportation inside and outside the county.

Barrera said the two sources of funding account for more than half of the organization’s revenue, which includes other one-time grants. He said without the LTA funding, he would need to terminate four employees. For the food program, he said 11 employees would be impacted.

The potential loss of both funds threatens the existence of Jóvenes De Antaño, Barrera said.



Danny Barrera Jr. (left) and Jovenes De Antaño board member Peter Serracino request support from the Hollister City Council. Image from Youtube video.

"Jovenes is here," Barrera said. "We want to be here. We want to serve our seniors. Our staff love our seniors. We do need local dollars to be sustained long term."



Ernie Caballero having lunch at the community center and takes time to wave to the camera. Photo by Noe Magaña



Maria Gaitan uses Jovenes De Antaño's transportation program

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He said the organization, which was founded in 1975 and lost its long-time leader in 2022, is pursuing corporate and local donations, and corporate grants to offer limited services. He said Jovenes would use such funds to keep a driver for in-county transportation services and to provide lunches.

"I'm hopeful we can get a lot of support from the community once they hear what's happening and what's needed," he said.

Martha's Kitchen Executive Director Bill Lee said his intent is to increase the services currently provided by Jovenes. He said Martha's Kitchen is committed to serve all seniors on the waitlist, provide meals all week by giving seniors two frozen meals on Fridays for the weekend, and partner with other organizations to offer other services such as legal assistance and music.

"Seniors have a tendency to be shut in at home and isolated and people need socialization, interaction with other people," Lee said. "They need resources and education."

Martha's Kitchen has been providing food for a variety of organizations in San Benito County since Lee, a Hollister resident, took over in 2019.

He said he'd like to continue to use the community center but if that's not possible he identified a potential site on San Benito Street in downtown Hollister.

The Local Transportation Authority board is expected to award the funds on March 20. The Seniors Council board is expected to make a preliminary decision the same day and a final decision on April 17.

We need your help. Support local, nonprofit news! BenitoLink is a nonprofit news website that reports on San Benito County. Our team is committed to this community and providing essential, accurate information to our fellow residents. Producing local news is expensive, and community support keeps the news flowing. Please consider supporting BenitoLink, San Benito County's public service nonprofit news.

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AFTER HOURS MIXER

MARCH 27TH 2025
5:00-7:00PM

HOSTED BY:



**Jovenes
De Antaño**
Senior Center
Est. 1975



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