



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 April 16, 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>

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AGENDA

- | | | |
|---------|----|--|
| 10 a.m. | 1. | Welcome, Call to Order and Introductions |
| | 2. | Additions & Deletions to the Agenda |
| | 3. | Receive Announcements from Advisory Council Members |
| | 4. | Comments from Members of the Public on <u>Items Not on the Agenda</u> |
| 10:10 | 5. | CONSENT AGENDA
Approve minutes of the March 2025 Advisory Council Meeting |
| 10:15 | 6. | PUBLIC HEARING: 2024-28 Area Plan Update |

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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|---------|-----|--|
| 10:35 | 7. | Committee Reports <ul style="list-style-type: none">1. Advocacy Committee2. California Senior Legislature |
| 10:45 | 8. | AAA Request For Proposals 2025-29 <ul style="list-style-type: none">1. Background2. Update3. Advisory Council Action |
| 11:05 | 9. | Invitations for Bid |
| 11:25 | 10. | Executive Director's Report <ul style="list-style-type: none">1. Master Plan for Aging & Solutions Summits2. State & Community Activities |
| 11:40 | 11. | Program Reports <ul style="list-style-type: none">1. Discussion of Aging & Disability Resource Connection (ADRC)2. Project SCOUT3. Foster Grandparent/Senior Companion Program |
| 11:55 | 12. | Miscellaneous Correspondence & Other Items |
| 12 Noon | 13. | Adjourn |

Next Meeting:
Wednesday, May 14, 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)

March 19, 2025

MINUTES

ADVISORY COUNCIL MEMBERS PRESENT:

Steve Clark (City of Scotts Valley)
Angela Curro (San Benito County Board of Supervisors)
Mindy Sotelo (San Benito County Board of Supervisors)
Mark Johannessen (At-large, Seniors Commission)

ALTERNATES PRESENT:

Sandy Brown (alternate J. Cummings)

ADVISORY COUNCIL MEMBERS EXCUSED:

Kimberly De Serpa (Santa Cruz County Board of Supervisors)
Justin Cummings (Santa Cruz County Board of Supervisors)
Gerry Jensen (City of Capitola)
Gabriela Trigueiro (City of Santa Cruz)
Jimmy Dutra (City of Watsonville)
Roxanne Stephens (Mayor, City of Hollister)
Scott Freels (City of San Juan Bautista)

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

STAFF PRESENT:

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

1. Welcome, Call to Order and Introductions

Acting Chair Sandy Brown called the meeting to order at 10:13 AM. Introductions were made.

2. Additions and Deletions to the Agenda

Clay added "electing a Chair and Vice-Chair", which had been omitted, as 7.3.

3. Receive Announcements from Advisory Council Members

None.

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

None.

5. Consent Agenda

5-1

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

MOTION, Clark/Sotelo, to approve the minutes of the February 2025 AAA Advisory Council meeting. **PASSED**

6. Committee Reports

1. Advocacy Committee:

- a. Crisis in Senior Services – Clay highlighted that SCC Meals on Wheels has started a waiting list, first time in their history. Caused by over \$100k reduction in County funding, will reduce people served by 140. MoW has shared plans and criteria with Seniors Council; three tiers based on applicant scores. Patty noted that each agency sets their own standards, and considering applying these metrics to other providers. Mindy asked how many people are currently being served, Patty said about 500. Clay noted again that CORE funding decisions are out of alignment with basic needs of community (e.g. healthy eating education vs. essential nutrition). Mark noted that Supervisor De Serpa would be an excellent advocate. Sandy said that Supervisor Cummings is considering legislation to end CORE and develop alternative that addresses major concerns. Sandy said Kim may join those efforts in future. Angela requested background on CORE process, and Sandy provided highlights since 2004 conception of process. 2017: hired consultants which created ‘byzantine’ application process, leading to lots of key information being discounted, resulting in shredding of safety net for County. SBC responded by locking in funding for existing programs, but application process is disorganized; Angela plans to be vocal in defending senior services against any cuts. The group discussed outreach efforts related to funding in SBC and need for consistent/persistent messaging. Clay described 10 proposed recommendations to improve CORE and will send to group. Angela described increasing resistance to traditional application process in SBC. Mindy noted difficulties of serving on City Councils due to part-time nature of position. Clay described changes made to FGP/SCP funding source to accommodate executive orders.
- b. Development of Policy on Endorsements & Supports – Seniors Council frequently receives requests for endorsement/support from other agencies; more recently, from housing developers. Current idea would be to not take position on specific projects, but rather to set criteria (e.g. for senior housing) that developers, planning commissioners, etc. can use for review. Steve phrased this as supporting the cause, not any one group. Sandy said this can also be a tool for outreach and highlighting senior needs.
- c. Ombudsman Funding Augmentation – Clay pointed to Item 6-7, letter from California Long-Term Care Ombudsman Program. Prior augmentation achieved by targeting specific accounts linked to nursing home findings, same plan for next cycle. Angela suggested death certificate recording as a source for trust accounts with senior-funding earmarks. Patty noted that HICAP is funded through fees as well. The group discussed various alternative funding streams based on service fees.

2. California Senior Legislature – no members present. Clay raised question of adding CSL rep to Advisory, however both reps are currently on Board. Patty suggested asking them to alternate making verbal reports to AC.

7. Advisory Council Vacancies

1. At-large - representing Persons with Disabilities – Zach recapped Stephanie’s background. **MOTION, Clark/Curro**, to nominate Stephanie Auld to join Advisory Council. **PASSED**.
2. Service Provider Representative – Clay said Bill McCabe has been serving as alternate and wishes to continue in that role. Aging & Disability Service Providers nominated Tara Ireland, starting in May. **MOTION, Curro/Brown**, to approve recommendation of Tara Ireland to join Advisory Council. **PASSED**.

3. Selection of Chair and Vice-Chair – Sandy said her experience was positive, and asked for volunteers or nominations. **MOTION, Curro/Clark**, to nominate Gabriela Trigueiro as Chair. **PASSED. MOTION, Clark/Brown**, to nominate Angela Curro as Vice-Chair. **PASSED.** Angela abstains.

8. AAA Request for Proposals 2025-29

1. Overview – Clay recapped briefly for newest members: process is to ask for letters of intent by categorical funding, to minimize and facilitate competition. Four competitive categories: Meal-site Transportation; Family Caregiver Support; Home-delivered Meals; Congregate Dining.
2. Proposal Review Committee Recommendation – final scores:
Congregate: Martha's Kitchen 721, Jovenes de Antaño 324
Home-delivered meals: MK 784, JdA 334
Recommend funding MK for two meals programs, Health Projects Center (812) for Family Caregiver (vs. JdA 210, withdrew)
Patty noted that Senior Network Services opted out this cycle to branch out into other areas. Steve said that panel's decision was clear, and expressed hope that JdA returns in future with improved application.
The group discussed the panel's makeup and decision-making process, emphasizing neutrality of membership and fairness of process, as well as deficiencies in specific applications.
3. Board Action – **MOTION, Johannessen/Clark**, to approve recommendations of the RFP panel. **PASSED.**

9. Executive Director Report

1. Master Plan for Aging & Solutions Summits – Clay described work on local playbook for each County, presented 9-3 and 9-4 outline. Report is due at end of June. Next step is to share with workgroups and begin gathering their input. Some discussion with SCC about who will draft final version.
Clay noted that SCC Master Plan for Aging/Age-Friendly Governance Committee has not met in quite some time and there has been significant turnover, need to convene another meeting. Sandy asked if it would be possible to terminate Committee and assign AAA as governing body, Clay said that is a County Board of Supervisors decision. New Supervisors eager to join but may lack context. The group discussed options for reformulating committee, emphasizing role of electeds, as well as next steps for Solutions Summit workgroups.
2. State & Community Activities –

10. Program Reports (written)

1. Project SCOUT – Sandy raised concerns about impact of Federal changes. Clay shared that SBC is receiving more service than in past years. Lost our IRS contact to DOGE cuts. Serious concerns about ITIN processing as returns may be used to target them. Reaching out to Santa Cruz Immigration Project for advice.
Program is excelling in all other regards.
2. *Foster Grandparent/Senior Companion Program*
3. *Aging & Disability Resource Connection (ADRC)*

11. Miscellaneous Correspondence & Other Items

12. Adjournment

The meeting was adjourned at 12:03 PM
Minutes prepared by: Zachary Johnson

DATE: April 11, 2025

TO: AAA Advisory Council
Seniors Council Board of Directors

FROM: Patty Talbott, AAA Administrator/Planner

RE: 2025-26 Update to the 2024-28 Area Plan on Aging

The Area Plan is a comprehensive document that must be completed in accordance with a prescribed template provided by the Department of Aging and the content required is very specific. The 2024-28 full Area Plan submitted last May was approved by the Department of Aging and is posted on our website.

The Annual Update incorporates any changes into the full Area Plan template format. The primary area of focus for the Update are the goals and objectives and service unit plans. Upon submittal to the Department of Aging, the full draft update will be posted to our website.

Included with this item is the draft summary report for the 2025-26 annual update to the 2024-28 Area Plan on Aging. This includes information about the AAA and planning process as well as Goals and Objectives for review and estimated services and funding for 2025-26.

- **Goals and Objectives.** No changes were proposed to the goals. Objectives are noted as Continued, Revised or Completed. Objective 4.5 was added for the San Benito County Volunteer Project.
- **Proposed Service Units and Funding.** As the Department of Aging has not yet released our 2025-26 funding awards, we do not have confirmed funding amounts yet. I have included in the summary the 2024-25 allocations for reference purposes only. We do not anticipate and significant changes in funding at this time. Detail on updated funding awards and contracted service units will be provided next month when we have received the 2025-26 CDA contract allocations and finalized our awards.

Action Requested: Approval of Summary Report including updated Goals and Objectives and estimated funding and service units.



**AREA AGENCY ON AGING
FOR SANTA CRUZ AND SAN BENITO COUNTIES**
Committed to maximizing the health and independence of seniors since 1979

**2024-28
AREA PLAN ON AGING
2025-26 Update**

Summary Report

**PLANNING AND SERVICE AREA 13
Santa Cruz and San Benito Counties**

175 Westridge Drive, Watsonville, CA
www.seniorscouncil.org
Patty Talbott, AAA Planner

OVERVIEW OF THE AREA AGENCY ON AGING

WHAT IS THE AREA AGENCY ON AGING?

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

- **Assess** the needs of seniors.
- **Advocate** at the local and state level for the needs of seniors.
- **Provide visible leadership** on senior issues in the community by monitoring and evaluating and commenting, or providing technical support on issues affecting seniors.
- **Plan for services** for the more than 80,000 seniors (age 60+) and their caregivers in Santa Cruz and San Benito Counties, and ensure that all senior services are well-coordinated.
- **Receive and allocate Older Americans Act funding and other state and federal funding dedicated to Area Agency on Aging services in our two-county planning region.** Nearly all program funding is contracted out to local community-based service providers.
- **Ensure that AAA-funded programs provide quality, efficient, effective services** that meet all OAA program and regulatory requirements and service delivery methods.
- **Ensure that the senior service delivery network is well-coordinated.**
- **Monitor emerging needs and support the development of innovative programs**
- **Engage at the local level in the development of Master Plans for Aging**

WHO DO WE SERVE?

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

The California Department of Aging estimates that in 2024, the 60+ population is:*

Santa Cruz County: 66,897 persons age 60 or older with 21,888 age 75+

San Benito County: 13,629 persons age 60 or older with 3,817 age 75+

**Source: 2025 California Department of Finance Population Projections.*

THE AREA AGENCY ON AGING PLANNING AND CONTRACT CYCLE



➡ ASSESSING LOCAL NEEDS

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

In this cycle, several needs assessment activities were undertaken. Because of these activities, the AAA was not required to undertake its own survey this cycle.

- **Statewide Senior (Age 50+) Assessment Conducted by the California Department on Aging.** For the first time, the California Department of Aging contracted with a research firm to complete implement a statewide survey of seniors for the Area Agencies on Aging. The summary reports for that survey were issued by AAA, not county.
- **Statewide LGBTQI survey Conducted by the California Department of Aging in partnership with UCSF, Open House and the Citris Banatao Institute.** Another first-ever statewide survey being conducted specifically for the LGBTQI community.
- **Santa Cruz County's Age Well Santa Cruz County survey.** As part of its Master Plan for Aging development, Santa Cruz County implemented its Age Well Santa Cruz County survey. AAA staff were engaged with County staff for the planning and implementation of this effort.
- **"Solutions Summits" in Santa Cruz and San Benito Counties.** As part of Master Plan for Aging efforts, the AAA led the effort to conduct two "Solutions Summits", one in each county, specifically to develop ideas and objectives for local Master Plan for Aging playbooks in Santa Cruz and San Benito Counties. The forums will be convened in partnership with each county. Workgroups are continuing to meet and develop actionable steps at the local level.

Information about all these efforts are available on the Seniors Council webpage. All of these efforts are incorporated into AAA planning where relevant to planning, services and advocacy activities.

➡ **DEVELOPING THE AREA PLAN ON AGING**

The AAA prepares the 4-year Area Plan on Aging for submittal to the California Department on Aging. The plan outlines our goals and what services that will be provided with the federal and state program funds that the AAA receives and contracts for. **The Area Plan on Aging has specific regulatory requirements, templates and formats provided by CDA.** This summary is provided to highlight the proposed goals and objectives and proposed funding and services in a more accessible format. The Area Plan also highlights the AAA's unique role in providing advocacy and leadership on senior issues and ensuring a well-coordinated senior service delivery network. **The Plan and its annual updates must be submitted to the California Department of Aging each May for review and approval.**

➡ **ALLOCATING FUNDS**

The funding for Area Agency on Aging programs originates at the federal level with the Older Americans Act, and is augmented by state matching funds and other state funding streams. These funds come in specific service categories. **AAAs are also required to obtain local matching funds**, these local funds are critical to service delivery. Providers are currently completing the final year of the 2022-25 contract cycle, with the exception of the Ombudsman program, which is on a separate cycle.

A Request for Proposals was undertaken this spring for the 2025-29 contract cycle. Successful applicants are awarded one-year contracts, beginning on July 1, 2025, with subsequent annual renewals issued up to three times, pending funding availability and that the provider remains in good standing with the contract terms.

➡ **ENSURING QUALITY & ACCOUNTABILITY**

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

PRIORITIES FOR THE AREA AGENCY ON AGING IN 2025-26

- **Continue to monitor developments at the federal level, such as the dismantling of the Administration on Community Living, and advocate for the preservation of senior programs, services and maintain vital safety net programs providing basic economic security and essential healthcare.**
- **After convening highly successful Solutions Summits in each county and coordinating ongoing workgroups, AAA staff will continue to engage with Master Plan for Aging efforts, at the State and local level, providing expertise to the development of local playbooks.**
- **Continue to promote the Aging and Disability Resource Connection (ADRC) as a “one stop shop” for information and service coordination in San Benito County.**
- **Building on a successful campaign to promote volunteerism in San Benito County, continue to expand the number of active volunteers engaged in senior programs and promote senior volunteerism in Santa Cruz County.**
- **Provide expertise and technical support for local projects related to senior issues.**
- **Monitor proposals or legislation affecting seniors and coordinate advocacy efforts as needed.**
- **Provide support to the AAA contracted service provider network to ensure a sustainable and viable service delivery system of high quality, proven programs that support the greatest level of autonomy and independence for seniors.**

MASTER PLAN FOR AGING

California’s statewide Master Plan for Aging is creating new opportunities for collaboration and innovation. The AAA Executive Director served on the State’s Master Plan for Aging Steering Committee and secured a local planning grant to support the development of local Master Plans for Aging in Santa Cruz and San Benito Counties. While the Area Plan on Aging is distinct from the development of local playbooks for the Master Plan on Aging, the AAA will be engaged in local MPA planning efforts. Goal 4 is focused on local Master Plan on Aging playbook develop and will highlight how the AAA is involved in local efforts and implementation.

Proposed Coordination Objectives in the Area Plan

There are several objectives with a “C” following them. This stands for Coordination, which is an allowable use of direct service funding. This very small amount of funding helps to support the AAA in their coordination efforts. All Coordination objectives must be approved by CDA.

Proposed coordination objectives are 1.1, 1.4, 2.5, 2.6, 3.31, 4.1 and 4.3

2025-26 AREA PLAN UPDATE GOALS AND OBJECTIVES

GOAL 1: VISIBLE LEADERSHIP. The AAA will provide visible leadership and effective advocacy to promote the needs of seniors and caregivers. (see also Goal 4: Master Plan for Aging/Age Friendly Communities)

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

Objectives funded with Title IIIB Direct Service funding for Coordination are indicated with "C." These objectives are limited in scope and must be approved by the California Department of Aging.

Objectives

1.1 State leadership on senior issues. AAA Executive Director will continue to work with former members of the State Master Plan on Aging Workgroup to share opportunities for improving OAA and non-OAA services and service delivery as well as identify unique equitable opportunities for older Californians to thrive and age in place. Measurement: State funding will be allocated that addresses objectives of the Master Plan for Aging 7/1/25-6/30/26 **C**
Status: Continuing

1.2 Local leadership on senior issues. The AAA Executive Director will provide local leadership to educate and inform elected officials and the public about current and emerging issues affecting seniors. Measurement: increased awareness about the needs of seniors in the PSA. 7/1/25-6/30/26
Status: Continuing

1.3 Local advocacy and engagement. The Seniors Council Advocacy Committee will identify local advocacy priorities and through advocacy alerts and updates on the Seniors Council website, promote civic engagement. The Committee will also monitor any efforts at the federal level to reduce or eliminate senior programs. Measurement: approved legislative platform, increased web visits to Seniors Council advocacy page and successful advocacy efforts. 7/1/25-6/30/26
Status: Revised

1.4 Active participation on local commissions and committees. The AAA Executive Director and AAA staff will actively participate on local committees and commissions including the Santa Cruz County Seniors Commission, San Benito County Aging and Long Term Care Commission, Santa Cruz County RTC's Elderly and Disabled Transportation Advisory Committee and San Benito County Social Services Transportation Advisory Committee. Measurement: regular attendance and participation at these meetings. 7/1/25-6/30/26
Status: Continuing **C**

2025-26 AREA PLAN UPDATE GOALS AND OBJECTIVES

GOAL 2: ENSURE THE PROVISION OF HIGH QUALITY SERVICES THAT PROMOTE OPTIMAL WELL-BEING AND INDEPENDENCE. Provide resources and services that promote optimal well-being and are efficient, effective and delivered through a well-coordinated service network.

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

Objectives:

2.1 Contracts and Allocations. AAA staff will ensure that AAA service delivery funds are allocated appropriately in accordance with the mandates and requirements of the AAA's Area Plan Contract with the California Department of Aging and all applicable regulations. 2024-25 will be the final year of the current contract cycle. After completion of the Requests for Proposal process, contracted providers will begin the 2025-29 contract cycle.. Contracted providers will be awarded one-year contracts, renewable annually up to three times, provided the contractor remains in good standing and availability of funding. Measurement: Successful execution of AAA service provider funding contracts for the 2025-26 program year 7/1/25-6/30/26

Status: Continuing

2.2 Program Monitoring/Compliance. AAA program and fiscal staff will ensure that AAA-funded services are efficient, effective and of high quality, meeting all contract and regulatory requirements. All service providers will receive ongoing fiscal and program desk monitoring, annual risk assessments and, at a minimum, on-site monitoring every two years, with nutrition providers receiving the required annual onsite monitoring. Measurement: completion of ongoing contract and fiscal performance monitoring and site visits and technical support as needed. 7/1/25-6/30-26

Status: Continuing

2.3 Quality Services, Measurable Results. In accordance with the service unit plan outlined in this Area Plan, the AAA will ensure the effective provision of services of Title IIIB Supportive Services, Title IIIC Nutrition Programs, Title IIID Health Promotion, Title IIIE Family Caregiver Support Program, Long Term Care Ombudsman and Title VIII Elder Abuse Prevention Program, as well as the Health Insurance Counseling and Advocacy Program, associated MIPPA Medicare outreach program. Expected outcome is provision of services that meets program service delivery requirements and that service targets contained in approved work plans and are delivered. Measurement: Documentation of ongoing service performance. 7/1/25-6/30/26

Status: Continuing

2.4 Equity and Targeting to Those in Greatest Need. In accordance with the Older Americans Act, all AAA-funded service providers will be required by policy and contract language to target services to those in greatest economic and social need including low-income, ethnic minority seniors and the recognition of HIV positive seniors as a population included in greatest social need. Services will be accessible and culturally competent.
Measurement: client data reporting and program monitoring 7/1/25-6/30/26
Status: Continuing

2.5 Ensure a coordinated service delivery network. The AAA Executive Director will convene monthly meetings of Aging and Disability Service Providers to ensure a high level of coordination and information sharing beyond the AAA-contracted network. Non-AAA contracted providers include: the Central Coast Center for Independent Living, the Diversity Center, the Cabrillo College Stroke Center, Elderday Adult Day Health Care, Grey Bears Brown Bag Program and Village Santa Cruz. Measurement: coordinated communication and sharing of information.
7/1/25-6/30/26 *Status: Continuing* **C**

2.6 Coordinate with organizations such as senior center directors and Parks and Recreation Departments and others to encourage new partnerships and collaborations. Focus will continue on senior center director's meetings and coordinating with Parks and Recreation programs. Measurement: increased coordination and collaboration with senior centers and Parks and Recreation departments. 7/1/25-6/30/26
Status: Continuing **C**

2025-26 AREA PLAN UPDATE GOALS AND OBJECTIVES

GOAL 3: ENSURE PROVISION OF AAA SERVICES INCLUDING ACCESS TO INFORMATION, BENEFITS AND PROTECTION OF RIGHTS FOR COMMUNITY LIVING SENIORS AND RESIDENTS OF FACILITIES, SUPPORT FOR FAMILY CAREGIVERS, AND ACCESS TO NUTRITIOUS MEALS

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

Objectives

3.1 Information & Assistance Through the provision of Title IIIB and Title IIIE information and assistance services by AAA contracted providers in both counties, the public will have access to accurate, up-to-date information about senior programs and services. Services will be available by phone, through agency web pages and via agency-developed resource guides. In San Benito County, the ADRC will be a central point of contact for information. Measurement: achievement of service unit targets, distribution of resource guides and maintenance of websites. 7/1/25-6/30/26 *Status: Revised*

3.2 ADRC San Benito County. The San Benito County Aging and Disability Resource Connection (ADRC) the AAA, in collaboration with local partners such as Jovenes de Antaño, the Central Coast Independent Living Center, and the San Benito County Aging and Long Term Care Commission will continue their work to expand and enhance the “no wrong door” system in San Benito County for seniors and persons with disabilities. Measurement: increasing utilization of the ADRC for seniors and persons with disabilities 7/1/25-6/30/26 *Status: Continuing*

3.3 Maintain and support key focal points for senior services.

3.3.1 With the loss of the Live Oak Senior Center as a key focal point, the AAA Executive Director and key staff will work with the contracted I&A provider to ensure that access to information resources is maintained. Maintenance of a key focal point for senior services in the Greater Santa Cruz Area 7/1/25-6/30/26 *Status: Revised* **C**

3.3.2 The AAA Executive Director will participate in the City of Watsonville Senior Center/Community Program workgroup to address new, ongoing and emerging issues and services to support older adults living in the City of Watsonville and surrounding South Santa Cruz County areas. Measurement: improved coordination and continued strengthening of this key focal point for senior services and expanded opportunities for engagement for seniors. 7/1/25-6/30/26 *Status: Continuing*

3.4 Legal Assistance. Through a contract with an approved Title IIIB Legal Assistance provider, the AAA will ensure that seniors in Santa Cruz and San Benito Counties will have access to free, high quality Legal Assistance for issues such as benefits eligibility, consumer and housing issues. Measurement: achievement of service unit targets 7/1/25-6/30/26
Status: Continuing

3.5 Ombudsman. Through a contract with an approved provider, the AAA will ensure the provision of Long Term Care Ombudsman services to provide facility-placed residents advocacy and rights protection, complaint investigation and resolution in Santa Cruz and San Benito Counties. The provider will also offer education, information and referrals to the community and facility staff as mandated by law Measurement: achievement of program benchmarks.
7/1/25-6/30/26 *Status: Continuing*

3.6 Elder Abuse Prevention. Through a contract with the Long Term Care Ombudsman provider, Title VII Elder Abuse Prevention activities will result in greater awareness about elder abuse, including identifying and preventing elder/dependent adult abuse. Services may include: public education sessions, trainings for professionals or caregivers and support to develop a coordinated system for elder abuse prevention. Measurement: achievement of benchmarks in service unit plan. 7/1/25-6/30/26 *Status: Continuing*

3.7 HICAP Through a contract with an approved provider, the AAA will ensure the provision of the Health Insurance Counseling and Advocacy (HICAP) program. Medicare and Medicare-eligible seniors will receive accurate information about Medicare enrollment, benefits and supplemental insurance options. Funds provided by the Medicare Improvements for Patients and Providers Act (MIPPA) will support HICAP to do targeted outreach to Medicare beneficiaries about the Low Income Subsidies and the Medicare Savings Program. Measurement: achievement of established benchmarks. 7/1/25-6/30/26 *Status: Continuing*

3.8 Project SCOUT/Tax Assistance. The AAA will, through use of direct service Title IIIB funds, provide support to the Seniors Council's Project SCOUT program, providing free tax assistance to seniors by IRS-trained volunteers, ensuring that seniors receive accurate tax assistance while actively engaging and coordinating with local partners such as local credit unions. Expected outcome is completion of accurate tax returns, including any refunds, and assistance with late filing as needed and maximum program impact through local coordination of efforts and expansion of service delivery to San Benito County. Measurement: number of returns 7/1/25-6/30/26 *Status: Continuing*

3.9 Senior Farmers Market Vouchers. The AAA Registered Dietitian will oversee the distribution of Senior Farmers Market vouchers to qualifying seniors at senior market days in summer, 2025. Seniors will benefit from increased access to fresh fruits and vegetables. Measurement: distribution of vouchers to qualifying seniors.
7/1/25-6/30/26 *Status: Continuing*

3.10 Family Caregiver Support Program. Through a contract with an approved provider, the AAA will ensure the provision of a coordinated, two-county Title IIIE Family Caregiver Support Program that will support caregivers in their caregiving role, thereby allowing the care receiver to maintain a healthy, safe lifestyle in the home setting. This will be accomplished through the provision of the Title IIIE Family Caregiver Support Program with services identified to meet priority local needs, including respite. Measurement: achievement of service unit targets in workplans. 7/1/25-6/30/26 Status: Revised

3.11 Title IIIC Nutrition Programs. Through contracts with approved providers in each county, the AAA will ensure the provision of Title IIIC1 Congregate Meals at senior dining sites and IIIC2 Home-Delivered Meals. Measurement: achievement of service unit targets in workplans. 7/1/25-6/30/26 Status: Continuing

3.12. Aging in Place-Minor Home Repairs/Home Safety/Falls Prevention. Through contracts with approved providers, the AAA will ensure the provision of volunteer-based Title IIIB minor residential repairs/home safety program. Focus will be on modifications that improve home safety and support senior's ability to remain safely independent in their homes and providing educational materials to improve awareness about falls prevention. Measurement: number of seniors served and number of modifications. 7/1/25-6/30/26 Status: Revised

3.12 Decreasing Isolation/Supporting Mental Health. Through a contract with an approved provider, the AAA will utilize Title IIIB funds to support visits to isolated seniors and peer counseling. 7/1/25-6/30/26 Status: Continuing

3.13 Provide Health Promotion Programs: Through the use of Title IIID Health Promotion funds, the AAA will contract for the provision of approved evidence-based classes in the Area Plan including a coordinated Matter of Balance program for the PSA. Measurement: number of volunteers trained and class sessions provided with Title IIID funding. 7/1/25-6/30/26 Status: Revised

2025-26 AREA PLAN AREA PLAN UPDATE GOALS AND OBJECTIVES

GOAL 4: MASTER PLAN FOR AGING AND AGE-FRIENDLY, LIVABLE COMMUNITIES. The AAA will actively participate in the development of local playbooks for the Master Plan for Aging and Age Friendly Communities efforts in the PSA.

Rationale: Providing programs and supports that empower seniors to remain as healthy, independent and engaged in their communities to the greatest extent possible is the core mission of Area Agencies on Aging. Both the Master Plan for Aging and Age Friendly Communities provide a way to ensure that the needs of seniors are included in local planning processes. A recent survey by AARP found that $\frac{3}{4}$ of survey respondents expressed a desire to stay in their current residence as long as possible.

4.1 Active engagement in the development of the local playbooks for Master Plan for Aging - Santa Cruz County. The AAA Executive Director and key staff will continue to actively engage in efforts to development local playbooks with specific objectives for the Master Plan for Aging in Santa Cruz and San Benito Counties.

Measurement: development of local playbooks with specific objectives for local implementation of the Master Plan for Aging 7/1/25-6/30/26 Status: Continuing **C**

4.1.1 As part of the development of local playbooks the AAA will coordinate the convening of a Solutions Summit in Santa Cruz County in Fall, 2024 to bring electeds, community leaders and advocates together to develop recommendations for local objectives for each of the five bold goals of the Master Plan for Aging. 7/1/24-6/30/25 Status: Complete

4.1.2 As a follow up to the Solutions Summit, the AAA will provide support to workgroups for each Master Plan for Aging goal that will be formed to help develop recommended objectives for each of the five bold goals. 7/1/25-6/30/26 Status: Continuing

4.2 Active engagement in the development of a local playbook for the Master Plan for Aging - San Benito County. In San Benito County, The AAA Executive Director and key staff will actively engage in efforts to development local playbooks with specific objectives for the Master Plan for Aging. Measurement: development of local playbooks with specific objectives for local implementation of the Master Plan for Aging 7/1/25-6/30/26 Status: Continuing

4.2.1 Following the convening of a Solutions Summit in San Benito County in May, 2024, AAA staff will provide support and coordination for the convening of workgroups to develop recommendations for local objectives for each of the five bold goals of the Master Plan for Aging. 7/1/25-6/30/26 Status: Continuing

4.3 Local Age Friendly Planning. The AAA Executive Director, and key staff, will continue to engage in local efforts in the PSA to create Age Friendly communities in Santa Cruz and San Benito Counties, providing local expertise and planning support as appropriate, with a goal of a coordinated planning effort. Measurement: number of trainings, informational meetings and jurisdictions taking action to commit to Age Friendly/Livable Communities Projects.

7/1/25-6/30/26

Status: Continuing C

4.4 Promote and Expand Opportunities for Senior Volunteerism and Engagement. The AAA Executive Director, in partnership with the Volunteer Center in Santa Cruz County, will promote civic engagement and volunteerism by seniors and encourage its contracted service providers and the Aging and Disability Provider Network to offer meaningful opportunities for seniors to participate in, and contribute to program operations. AAA funding will support a number of programs that utilize trained senior volunteers to provide services including: tax preparation, Ombudsmen services, minor home modifications, assistance at senior dining centers, delivery of home-delivered meals, and HICAP counseling.

7/1/25-6/30/25

Status: Complete

4.5 Utilizing new State Older Californians Act Modernization program funding, and in partnership with the Volunteer Center in Santa Cruz County the AAA will coordinate efforts to develop a Volunteer Center in San Benito County to promote volunteerism and coordinate recruitment and placement of volunteers. Measurement: increased opportunities for senior volunteerism and engagement and development of a volunteer program in San Benito County.

7/1/24-6/30/25

Status: Complete

4.6 Utilizing new State Older Californians Act Modernization program funding, and in partnership with the Community Foundation of San Benito County, the AAA will coordinate efforts to develop a Volunteer Recruitment Program in San Benito County to promote volunteerism and coordinate recruitment and placement of volunteers. Measurement: increased opportunities for senior volunteerism and engagement, and development of a volunteer program in San Benito County.

7/1/25-6/30/26

Status: New

4.7 Local Disaster Preparedness. The AAA staff will continue to support efforts at the State and local level to improve coordinated disaster preparedness efforts for fire, flood and earthquakes and planned power shut-offs and advocate for disaster planning to be included as a domain in all Age Friendly planning. As part of this effort, the AAA will complete a major distribution of emergency kits and preparedness information in both counties. Measurement: Participation in local efforts and successful inclusion of disaster preparedness in Age Friendly planning and distribution of emergency kits and preparedness information.

7/1/24-6/30/25

Status: Complete

2024-25 AREA PLAN FUNDING ALLOCATIONS & SERVICE UNITS

**PROVIDED ONLY FOR REFERENCE FOR 2025-26 UNTIL CDA ALLOCATIONS ARE RECEIVED.
AND FINAL CONTRACT NEGOTIATIONS ARE COMPLETE**

IIIB SUPPORTIVE SERVICES	SC CO	SB CO	TOTAL	UNITS
I&A (Access)	\$ 77,500	\$ 20,000	\$ 97,500	2,500
Case Mgmt (Access)	\$ 23,500	\$ 5,000	\$ 28,500	12
Transportation - Mealsites (Access)	\$ 20,000	\$ 23,000	\$ 43,000	3,760
Visiting \$3750 SNS and \$7500 FSA	\$ 11,250	\$ -	\$ 11,250	400
Peer Counseling	\$ 7,500	\$ -	\$ 7,500	350
Residential Repairs	\$ 25,000	\$ -	\$ 25,000	200
Legal Assistance (both counties)	\$ 69,000	\$ 23,000	\$ 92,000	2,500
	\$ 233,750	\$ 48,000	\$ 281,750	
Direct IIIB: \$24,000 (Outreach \$2000, Coord \$4300, SCOUT \$17,700)				
IIIC1 NUTRITION	SC CO	SB CO	TOTAL	UNITS
Congregate	\$ 358,469	\$ 117,435	\$ 475,904	53,000
IIIC2 NUTRITION				
Home-Delivered	\$ 669,340	\$ 218,678	\$ 888,018	156,500
Direct IIIC \$14,450: \$13,100 Prov RD \$1050 Nutr Ed				
IIID: (IFB) MOB, Enhance Fitness, Bingocize, Tai Chi for Arthritis			\$23,508	varies
IIIE FAMILY CAREGIVER SUPPORT PROGRAM				
Transitioned to 16 federal service categories-must provide at least one svc in each of the 5 areas				
Caregiver Access	SC CO	SB CO		Units
1. Caregiver Case Management	\$ 20,000	\$ 3,000	\$ 23,000	620
2. Caregiver I&A (includes Outreach)	\$ 13,000	\$ 2,910	\$ 15,910	1,075
Caregiver Information Services				
3. Info Svcs (Incl comm info and public (ac	\$ 2,500	\$ 3,665	\$ 6,165	16
Caregiver Support Services				
4. Caregiver Training	\$ -	\$ 500	\$ 500	25
5. Caregiver Support Groups	\$ -	\$ -	\$ -	
6. Caregiver Counseling	\$ -	\$ -	\$ -	
Caregiver Respite Care				
7. Respite In-home	\$ 50,000	\$ 22,432	\$ 72,432	2,350
8. Respite Out of Home (Day)	\$ -	\$ -	\$ -	
9. Respite Out of home (Overnight)	\$ -	\$ -	\$ -	
10. Respite: Other	\$ -	\$ -	\$ -	
Caregiver Supplemental Services				
11. Caregiver Legal Consultation	\$ -	\$ -	\$ -	
12. Caregiver Consumable Supplies	\$ -	\$ 750	\$ 750	20
13. Caregiver Home Mods	\$ -	\$ 600	\$ 600	8
14. Caregiver Assistive Technology	\$ -	\$ 600	\$ 600	5
15. Caregiver Other: Assessment	\$ 8,000	\$ 4,000	\$ 12,000	400
16. Caregiver Other: Caregiver Registry	\$ 21,871	\$ -	\$ 21,871	300
	\$ 115,371	\$ 38,457	\$ 153,828	
LTC Ombudsman Program			\$175,115	



AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

Suggested Strategies and Improvements Community Program Funding - including CORE

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

Ten Recommendations (details follow)

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

Additional Detail:

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

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

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

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

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

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

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

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

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

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

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

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

Community Program Funding Must Continue To Evolve And Change

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



AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

Date: 4-11-25

To: Seniors Council Board of Directors
AAA Advisory Council

From: Clay Kempf, Executive Director

RE: 2025-29 RFP Update

BACKGROUND

Our Request for Proposal Process (RFP) has been a key focus of our staff and of both our Area Agency on Aging (AAA) Advisory Council and our Board of Directors since fall of last year. As all of you now know, every four years we are required by regulations to offer our services to new and existing providers. In recent months the Board, with input and active participation from our AAA Advisory Council have taken formal action around this process, including awarding funds in several titles to organizations providing services in either (or sometimes both) Santa Cruz or San Benito Counties. We also made the decision to award some smaller awards via an Invitation for Bid (IFB) process rather than a full RFP. Details of our IFB process will be part of a separate discussion during our April meetings.

The applicant agencies proposals were reviewed and scored after being invited to make formal presentations before our Proposal Review Committee, with the Committee submitting their recommendations to our Board of Directors and to our Advisory Council. The Committee was comprised of members from our Board of Directors, staff, Advisory Council members, and members of the public.

MARCH ACTION

Time was available on our agenda for applicant agencies to make comments and answer questions regarding their agency and proposed services. Our Board took formal action to endorse the recommendations of the Proposal Review Committee and temporarily award three categories of funding;

1. Award annual funding of \$118,000 to Martha's Kitchen for the operation of the Congregate Meals program in FY 2025-26.

2. Award annual funding of \$219,000 to Martha's Kitchen for the operation of the Home Delivered Meals program in FY 2025-26.
3. Award annual funding of \$38,000 to Health Projects Center to operate the Family Caregiver Support Program in San Benito County, and \$114,000 to operate the Family Caregiver Support Program in Santa Cruz County.

All three awards are eligible for continued funding through the July 1 2028-June 30 2029 program year provided services meet the expectations & requirements of the AAA and the provider wishes to continue with the services. Exact amounts of the award will be adjusted upon receipt of state & federal funding allocations from the California Department of Aging.

This action was endorsed by the AAA Advisory Council prior to the Board action as part of their review and consideration of the same recommendations from the Proposal Review Committee. The AAA Advisory Council was unanimous in their recommendation.

The action was only temporary because part of the process includes providing two weeks for applicant agencies to appeal the process. Applicant agencies were notified of the recommendation on Friday, March 21, 2025, and given until mid-day on Monday, April 7, 2025 to submit an appeal of the decision. Appeals could only be considered on the basis of a flaw in the process used.

\$23,000 in Title IIIB funds for Congregate Mealsite Transportation were tabled, pending the outcome of the San Benito County Council of Governments/Local Transit Authority's RFP for Specialized Transportation. No final action has been taken by the COG/LTA on this issue. The Board committed to dedicating the future allocation of these funds to services to those living in San Benito County.

APRIL UPDATE

No appeals have been received regarding the March action and the awards of funding.

AAA ADVISORY COUNCIL ACTION

Staff recommends that the AAA Advisory Council review this month's update, hear comments from the public, and make a recommendation to the Seniors Council Board of Directors to confirm the preliminary funding awards that were made in March for the 2025-29 funding cycle.

BOARD OF DIRECTORS ACTION

Staff recommends that the Board of Directors follows the action of the AAA Advisory Council, and after hearing their input and any comments during the April meeting,

make a final decision on the award of funding to Martha's Kitchen and Health Projects Center, as described in this report.



AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

DATE: April 11, 2025

TO: AAA Advisory Council
Seniors Council Board of Directors

FROM: Patty Talbott, AAA Administrator

RE: INVITATION FOR BID FOR SMALL CONTRACTS

Although we recently completed the Request for Proposals process for most of our AAA funds, there are still several small amounts of funding to allocate for 2025-26.

Previously, we have put all services out to a full RFP, regardless of size. To decrease the administrative and reporting burden for smaller grants, the Department of Aging is supporting the use of Invitations for Bid for smaller grants. CDA guidance requires that the AAA "need only obtain price or rate quotations from a number of qualified sources and informally select the source with which to contract or obtain the purchase."

Historically we have had two smaller grants funded under Santa Cruz County's allocation of **Title IIIB Supportive Services**. Both of these grants are under \$25,000. We will be using the IFB process for these grants:

- Residential Repairs/Minor Modifications for the installation of safety equipment such as grab bars and improved stairs or handrails.
- To address isolation and mental health, a small grant of \$15,000 which supports visits to isolated seniors and a peer counseling program.

The AAA also receives a funding allocation of about \$25,000 for **Title IIID Health Promotion Programs**, which require the use of approved evidence-based programs. These funds were previously utilized inhouse with Seniors Council staff coordinating the Matter of Balance program in Santa Cruz County.

In order to maximize the use of these funds and broaden their reach, we are seeking a provider to implement a coordinated Matter of Balance program in our two-county PSA. Title IIID programs have very specific training requirements and certifications, so we believe a coordinated model focusing on this very successful and popular falls prevention program which utilizes trained volunteers, is the best way to maximize the impact of this small amount of funding.

ACTION REQUIRED: None at this time

Bids will be due on May 12 and staff will bring their recommendations to the Advisory Council and Board at your May meetings.



AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

Date: 4-11-25

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: Executive Director's April Report

MASTER PLAN FOR AGING (MPA) & SOLUTIONS SUMMITS

Solutions Summit workgroups are beginning to engage in the process for developing the Master Plan for Aging Local Playbooks, per our previous report. Each of the ten workgroups continue, with those in San Benito County being chaired and organized by Corey Shafer, and Zach doing the same for the five groups in Santa Cruz County. The San Benito County workgroups started earlier than the Santa Cruz effort, and as a result are slightly ahead in their timeline.

The Aging and Long Term Care Commission of San Benito County continues to embrace and engage in their role as the MPA Local Playbook Advisory Council.

The Santa Cruz County Governance Committee performs that role in Santa Cruz County, and will convene for the first time this year at the end of the day on April 16. The Governance Committee is undergoing a number of changes; with staff representatives at the City of Santa Cruz changing, along with the seats for County Board of Supervisor representation. I've added Zach Johnson to attend from the Seniors Council, and continue to offer to host the meeting via Zoom. Wayne Norton and Pam Arnsberger are supposed to be on the Committee representing us, but haven't been able to join due to poor connections with Microsoft Teams, or being omitted from the invitation list.

AGENCY OPERATIONS

On the heels of the CDA Audit, the Department of Aging conducted a Fiscal Monitoring/Technical Review of our organization this week. Historically, CDA's Monitoring process included both Program Operations and Fiscal Operations, but now those have been split into separates reviews, and called Technical Review instead of Monitoring. Our Exit Interview was held a day early as a result of the positive review from CDA staff.

The final report from our CDA Fiscal Audit is included in the packet. We're very happy with the report and the positive review after a process that took four months to complete.

Follow-up to our RFP process has taken a significant part of my time, along with that of other staff this past month. Closely related has been our efforts to address the ongoing struggles of Jovenes de Antaño.

STATE & COMMUNITY ACTIVITIES

Britt, Corey and I met with the Community Foundation for San Benito County (CFFSBC) staff and key members of their Senior Project. The group was interviewing us to provide background at their Board of Directors meeting where their Board was considering whether or not to continue to year two of their three-year partnership with us to implement the MPA Local Playbook and support our volunteer engagement. The meeting went very well, and I'm happy to report that the CFFSBC Board voted to continue the partnership for the coming year.

California Department of Aging is kicking off a series of webinars to address their Aging 2030 goals, including the implementation of SB 1240. Upcoming topics include Revising the IntraState Funding Formula; Designation and de-designation of AAAs; and Core AAA Services and Performance Measures are among the topics.

As previously mentioned, we've rejoined the California Association of Area Agencies on Aging (C4A), and I was able to attend most of their March meeting. Besides the CDA workshops, C4A activities include supporting various budget augmentations, addressing Long Term Care Ombudsman operations, and re-forming a committee or workgroup that engages with state provider association.

We continue to engage with the local community on many efforts that address the needs of older adults and people with disabilities. Staff will be reviewing community committee assignments in the coming months to make sure we have appropriate engagement to the extent that's reasonable.

CALIFORNIA DEPARTMENT OF AGING
Division of Administrative Services
2880 Gateway Oaks Drive, Suite 200
Sacramento, CA 95833
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TEL 916-419-7517
FAX 916-928-2267
TTY 1-800-735-2929



March 17, 2025

Transmitted via email

Agency Code: PSA 13
Project Number: PSA-24-13

Clay Kempf, Executive Director
Seniors Council of Santa Cruz and San Benito Counties
234 Santa Cruz Avenue
Aptos, CA 95003

Re: Notice of Audit Determination
Planning and Service Area 13
Audit Period of February 1, 2020 through September 30, 2023

Final Report – Seniors Council of Santa Cruz and San Benito Counties, Planning and Service Areas Audit

The California Department of Aging (CDA), Audits and Risk Management (ARM) Branch, has completed its audit of the Planning and Service Area 13 administered by Seniors Council of Santa Cruz and San Benito Counties (Agency), for the audit period of February 1, 2020 through September 30, 2023.

The enclosed Final Notice of Audit Determination report contains ARM's conclusions regarding the Agency's financial closeout reports, internal controls, and compliance requirements.

A draft Notice of Audit Determination report was issued on March 4, 2025, for review and comment. The Agency submitted a written response dated March 7, 2025, stating the Agency agrees with our finding and recommendations. The Agency's response is included in the report.

We appreciate the assistance and cooperation of the Agency. If you have any questions regarding the report, please contact Joe Hodges, Supervisor, External Provider Audits Bureau, at Joe.Hodges@aging.ca.gov, or (916)928-8344.

10-3

Sincerely,

Joe Hodges
Supervisor, External Provider Audits Bureau

Enclosures

cc: via email:

Jeremy Jackson, Audit Chief, Audits and Risk Management Branch, CDA
Denise Likar, Deputy Director, Home and Community Living Division, CDA
Jena Sachs, Bureau Chief, External Provider Audits Bureau, CDA

10-4



NOTICE OF AUDIT DETERMINATION

PLANNING AND SERVICE AREA 13
Seniors Council of Santa Cruz and San Benito Counties
Fiscal Years 2021/22 through 2022/23

CALIFORNIA DEPARTMENT OF AGING
AUDITS AND RISK MANAGEMENT BRANCH
2880 GATEWAY OAKS, SUITE 200
SACRAMENTO, CA 95833
aging.ca.gov

March 2025
Project Code: PSA-24-13

RESULTS IN BRIEF

The California Department of Aging (CDA), Audits and Risk Management Branch conducted a fiscal and compliance audit of the Planning and Service Area (PSA) 13, administered by the Seniors Council of Santa Cruz and San Benito Counties (Agency). CDA audit staff did identify weaknesses in internal controls and reportable conditions of compliance requirements. A detail of the finding is noted in the Finding and Recommendations section of this report. Specifically, the following finding was noted during the audit:

Finding: Unallowable Indirect Costs – Internal Controls and Noncompliance

BACKGROUND

CDA administers programs that serve older adults, adults with disabilities, family caregivers, and residents in long-term care facilities throughout the State. These programs are funded through the federal Older Americans Act (OAA), the Older Californians Act (OCA), and through the Medi-Cal program.

CDA contracts with the network of 33 Area Agencies on Aging (AAA), who directly manage a wide array of federal and state-funded services that provide meals; help finding employment; supportive services to assist older individuals as well as younger adults with disabilities to live as independently as possible; promote healthy aging and community involvement; and support family members in their vital care giving role.

CDA also contracts with 38 agencies that operate the Multipurpose Senior Services Program through the Medi-Cal home and community-based waiver for the elderly and certifies approximately 242 Adult Day Health Care Centers for participation in the Medi-Cal Community Based Adult Services (CBAS) Program.

To promote the Department's goal of every Californian having the opportunity to enjoy wellness, longevity and quality of life in strong healthy communities, CDA actively collaborates with many other State departments (and other entities) on transportation, housing and accessibility, emergency preparedness and response, wellness and nutrition, falls and injury prevention, improving services to persons with dementia, reducing fraud and abuse and many other issues.

The Agency is a community-based non-profit, tax-exempt 501(c)(3) organization providing services in Santa Cruz, San Benito, Monterey, and Santa Clara Counties. It is the mission of the Agency to enable older persons to function with independence and dignity in their homes and in the community to their fullest capacity¹.

During the audit scope, the Agency contracted with CDA to provide services, including:

¹ Agency website: <https://seniorscouncil.org/about-seniors-council/>

- Supportive Services Programs (Title III B) – The OAA Title III B Supportive Services Program provides a variety of services to address functional limitations, maintain health and independence, and promote access to services. The Title III B Information and Assistance (I&A) Program is the entry point to services in a Planning and Service Area. I&A staff assess individuals' needs, make referrals to local services or programs in the communities, and follow-up with individuals to find out if service needs were met. In addition, I&A staff work with local agencies on disaster planning and preparedness activities to address older adults' needs during local or statewide disasters. The Title III B Supportive Services Program provides a variety of services, including but not limited to personal care, homemaker, and chore; adult day care/adult day health; case management; assisted transportation; transportation; legal assistance; telephone reassurance; I&A; and outreach.
- Congregate Nutrition Program (Title III C-1) – The OAA Title III C-1 Congregate Nutrition Program serves meals in a group (congregate) setting to individuals aged 60 or older. Sites also provide nutrition education, nutrition risk screening and nutrition counseling in some areas. The Program targets older individuals with the greatest economic or social need, with particular attention to low-income, minority older individuals, and older individuals living in rural areas. The Program encourages the use of volunteers and gives all participants the opportunity to contribute to the cost of the meal. Each meal must meet the nutritional standards outlined in the Dietary Guidelines for Americans and provide a minimum of one-third of the Dietary Reference Intakes.
- Home-Delivered Nutrition Program (Title III C-2) – The OAA Title III C-2 Home-Delivered Nutrition Program provides nutritious meals, nutrition education, and nutrition risk screening to individuals aged 60 or older that are homebound due to illness or disability or are isolated. The Program targets homebound older individuals with the greatest economic or social need, with particular attention to low-income, minority older individuals, and older individuals living in rural areas. Program goals are to promote better health through nutrition, provide links to other supportive services, and reduce social isolation through contact with the individuals who deliver the meals. Each meal must meet the nutritional standards outlined in the Dietary Guidelines for Americans and provide a minimum of one-third of the Dietary Reference Intakes. Most Home-Delivered Nutrition Programs provide meals five days a week delivered by staff or volunteer drivers. In addition, programs provide nutrition education at least four times per year and nutrition counseling is available in some areas.
- Disease Prevention and Health Promotion Program (Title III D) – The OAA Title III D Disease Prevention and Health Promotion Program provides evidence-based disease prevention and health promotion services. Title III D supports services that assist older adults in preventing illness and managing chronic conditions. Effective July 1, 2016, Title III D programs and activities must have demonstrated through rigorous evaluation to be effective in improving the health of older individuals or approved as evidence-based by the U.S. Department of Health and Human Services. Title III D evidence-based health promotion programs help older adults learn techniques and strategies for the prevention and mitigation of the effects of chronic diseases including

osteoporosis, hypertension, obesity, diabetes, and cardiovascular disease. Evidence-based health promotion services include programs focused on alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management, falls prevention, physical activity, and improved nutrition. Individuals participate in services in a variety of settings including multipurpose senior centers, community centers, congregate nutrition sites, and in their homes.

- Family Caregiver Support Program (Title III E) – The OAA Title III E Family Caregiver Support Program (FCSP) provides a variety of services to address the needs of informal, unpaid family caregivers. The Program provides service to: (1) informal caregivers of older adults; and (2) older relative caregivers (who are 55 years of age and older), with primary caregiving responsibilities for a child or individuals with a disability. Program services include, but are not limited to, respite care; support services; supplemental services; access assistance; and information services.
- Health Insurance Counseling and Advocacy Program (HICAP) – HICAP is a consumer-oriented program providing Medicare and related health insurance counseling and education. HICAP offers the following services community education; individual health insurance counseling; informal advocacy services; and legal assistance or legal referral.
- Long-Term Care Ombudsman Program (LTCOP) – The OAA Title III B and Title VII A Ombudsman Program identifies, investigates and resolves complaints made by or on behalf of residents of long-term care (LTC) facilities that affect the residents' health, safety, welfare or rights. The Program also receives and investigates reports of suspected elder and dependent adult abuse occurring in LTC facilities, adult residential facilities, adult day programs, adult day health care facilities, intermediate care facilities for the developmentally disabled, congregate living health facilities, and adult residential facilities for persons with special health care needs. Local staff and volunteers witness advance health care directives and certain property transfers for residents in nursing facilities to ensure these transactions are entered into without undue influence. The Program also provides community education to inform the public about LTC services and issues that affect residents.
- Elder Abuse Prevention Program – The OAA seeks to enable older individuals to maintain their well-being through locally developed community-based systems of services. The OAA Title VII Elder Abuse Prevention Program provides services to develop, strengthen, and implement programs for the prevention, detection, assessment, and treatment of elder abuse. Allowable activities include, but are not limited to, public education and outreach; the coordination of elder abuse prevention services with adult protective services, law enforcement, courts, and other entities; and training.
- Medicare Improvement for Patients and Providers Act (MIPPA) - MIPPA, signed into law July 2008, provides funding to help Medicare beneficiaries apply for two valuable benefits: the Low-Income Subsidy "Extra Help" (LIS/Extra Help); and the Medicare Savings Program (MSP). This funding helps states to increase outreach and

awareness efforts to consumers with low incomes who are unaware of these valuable benefits. Federal MIPPA funding is allocated to AAAs, HICAPs, and Aging and Disability Resource Connections (ADRCs) to provide this outreach and education to assist Medicare beneficiaries who are not currently receiving these benefits in applying for them.

AUDIT OBJECTIVES AND SCOPE

CDA Audits and Risk Management Branch conducted an audit of the Agency's financial reporting, internal controls, and compliance requirements, in order to ensure compliance with applicable laws, regulations, grants and contract requirements.

Specifically, the audit objectives were to determine whether the Agency:

- Developed annual Financial Closeout Reports (Closeout Reports) that fairly represent the financial operations of the CDA-funded programs.
- Maintained adequate internal accounting and administrative controls to ensure expenditures reported to CDA were accurate and allowable.
- Maintained adequate internal controls and procedures to ensure compliance with applicable laws, regulations, and contract requirements.

This audit report represents the audit resolution of the Agency's contracts for the audit period of February 1, 2020 through September 30, 2023.

In performing our audit, we considered internal controls significant to the audit objectives. Agency management is responsible for ensuring accurate financial reporting and compliance with applicable laws, regulations, and contract requirements.

METHODOLOGY

To plan the audit, we gained an understanding of the Agency and respective programs, and identified relevant criteria, by interviewing Agency and CDA personnel, reviewing the standard agreement between CDA and the Agency, the Title 2 Code of Federal Regulations Part (CFR) Part 200, Title 45 CFR, Title 22 California Code of Regulations Division 1.8 CDA, 42 U.S. Code Chapter 35 Programs for Older Americans, and applicable Agency policies and procedures.

We conducted a risk assessment, including evaluating whether the Agency's key internal controls relevant to our audit objectives were properly designed, implemented and operating effectively. Key internal controls evaluated focused on key processes such as payroll/timekeeping, incurring and recording direct expenditures, allocating indirect costs, maintaining inventory of equipment, and contracting with subrecipients. Our assessment included conducting interviews with Agency personnel, observing processes, reviewing Agency policies and procedures, and testing transactions. Deficiencies in internal control that were identified during our audit and determined to be significant within the context of our audit objectives, are included in this report.

Additionally, we assessed the reliability of the data from the Agency's accounting system, QuickBooks. To assess the reliability of data generated by this system, we interviewed Agency staff, reviewed information process flows, examined existing reports and documents, and reviewed system controls. We determined the data were sufficiently reliable to address the audit objectives.

Based on the results of our planning, we developed specific methods for gathering evidence to obtain reasonable assurance to address the audit objectives. To address our audit objectives, we performed the following procedures:

- Reviewed the standard agreement between CDA and the Agency, the Closeout Reports, and applicable policies and procedures.
- Examined the Agency's accounting records, timesheets, vendor contracts and invoices, cancelled checks, bank statements, purchase orders, Single Audit Reports, and subrecipient records.
- Examined a selection of claimed expenditures and determined whether they were allowable, program related, supported by accounting records, and properly recorded.
- Reviewed the claimed indirect costs to determine whether the Agency exceeded the maximum threshold amount allowable for indirect costs.
- Examined equipment records and physical equipment to determine whether the Agency properly maintained inventory of equipment.

We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our finding and conclusions based on our audit objectives. We believe the evidence obtained provides a reasonable basis for our finding and conclusions based on our audit objectives.

SUMMARY ON REPORTING

Report on Financial Closeouts

CDA audit staff reviewed the Agency's audited financial statements and accounting records to determine if the amount reported in the Closeout Reports were allowable, supported, and accurately reported. CDA audit staff examined, on a test basis, evidence supporting the amounts claimed on the Closeout Reports, and determined whether costs were allowable and supported.

CDA audit staff determined that, except for the conditions referred to in the Finding and Recommendations section of the report, the Closeout Reports submitted by the Agency fairly presented the financial operations of the Agency (see Finding).

Report on Internal Controls

CDA audit staff reviewed internal controls, on a test basis, over financial reporting and compliance with certain provisions of laws, regulations, contracts and grant requirements. The purpose of the internal control review was to identify any deficiencies or weaknesses in internal controls that may have a material effect on the financial operations of the CDA-funded programs.

The Agency's single audit reports, prepared by Walters & Kondrasheff, did not identify any material internal control weaknesses or reportable conditions related to CDA-funded programs.

CDA audit staff identified reportable conditions that constitute a deficiency in internal controls as noted in the Finding and Recommendations section of this report (see Finding).

Report on Compliance Requirements

CDA examined compliance requirements, on a test basis, with certain provisions of laws, regulations, contracts and grant requirements. The purpose of our compliance requirement review was to identify any deficiencies or weaknesses over compliance that may have a material effect on the CDA-funded programs.

CDA audit staff identified reportable conditions of non-compliance as noted in the Finding and Recommendations section of this report (see Finding).

FINDING AND RECOMMENDATIONS

Finding: Unallowable Indirect Costs – Internal Controls and Noncompliance

Condition

CDA audit staff tested Agency's indirect expenditures for FYs 2021/22 and 2022/23 to determine whether the amounts reported to CDA were accurate, allowable, and adequately supported. CDA audit staff determined the Agency wasn't consistent in its treatment of direct and indirect costs. CDA audit staff identified the Agency reported \$5,610 of expenditures as indirect costs for the Dignity at Home Fall Prevention program. The Agency reported the same types of expenditures as direct costs within the Dignity at Home Fall Prevention program.

Cause

The Agency stated they do not usually have indirect costs and were unaware they were not applying consistent treatment when assigning costs.

Effect

The Agency was out of compliance with the CFR regarding consistent treatment of direct and indirect costs. CDA audit staff determined that the expenditures reported as indirect costs would be allowable as direct costs, therefore, the auditor reclassified them as direct costs. No recoverable amount was identified.

Recommendation

The Agency should adhere to the consistent treatment of costs requirements in Title 2 CFR 200.403.

Criteria

In accordance with 2 CFR 200.403 - Except where otherwise authorized by statute, costs must meet the following criteria to be allowable under Federal awards:

- (d) Be accorded consistent treatment. For example, a cost must not be assigned to a Federal award as a direct cost if any other cost incurred for the same purpose in like circumstances has been allocated to the Federal award as an indirect cost.

CONCLUSION

CDA ARM Branch limited this audit to the areas specified in the objectives and scope section of this report. Selected testing procedures provide reasonable, but not absolute, assurance that these transactions complied with the laws, regulations, grants, and contract requirements except as noted in this report. The conclusions outlined in this report are based on information made available or otherwise obtained at the time this report was prepared.

Joe Hodges
Supervisor, External Provider Audits Bureau
Audit Staff: Amber Yip, Associate Management Auditor

AGENCY'S RESPONSE AND AUDITS' ANALYSIS

Summary of Agency's Response

The Agency submitted a written response dated March 7, 2025, stating that they agree with the audit finding.

Audits Analysis of Agency's Response

As the Agency was in agreement with the draft report, no changes were made to the final report.

Agency's Written Response

See the following page.



AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

PROJECT SCOUT
Tax Counseling Assistance

FALLS PREVENTION PROGRAM
Emergency Response Systems, Assessments & Training

March 7, 2025

Joe Hodges
Supervisor, External Provider Audits Bureau CALIFORNIA DEPARTMENT OF AGING
Division of Administrative Services
2880 Gateway Oaks Drive, Suite 200
Sacramento, CA 95833

RE: March 2025 Draft CDA Draft Notice of Audit Determination

Dear Mr. Hodges-

The Seniors Council of Santa Cruz & San Benito County accepts and agrees with the contents of the Department's Draft Notice of Audit Determination, dated March 4, 2025.

We appreciate the Department's input, guidance and advice in reviewing our services and fiscal operations, and helping us to ensure funds are used appropriately and effectively in serving older adults in our state and local communities.

We also appreciate the cooperative approach and professionalism of the audit team in their work with our fiscal staff, highlighted by Amber Yip's friendly and engaging demeanor.

Sincerely,

Clay Kempf
Executive Director

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

cc: via email:

Amber Yip, Auditor, California Department of Aging
Jeremy Jackson, Audit Chief, Audits and Risk Management Branch, CDA
Jena Sachs, Bureau Chief, External Provider, Audits Bureau
Cathleen Colvard, Seniors Council Fiscal Officer
Patty Talbott, AAA Administrator

10-17

234 Santa Cruz Avenue • Aptos, California 95003 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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AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

PROJECT SCOUT
Tax Counseling Assistance

FALLS PREVENTION PROGRAM
Emergency Response Systems, Assessments & Training

PROJECT SCOUT

Free Tax-Prep Sites in March 2025

1. Project SCOUT Facilitated Self Assistance ALL Online: <http://tinyurl.com/SCOUTFSA>
2. Project SCOUT TCE ALL (Remote, in-home, 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 (Saturday 10am - 1pm)
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)
8. Mid-County Senior Center Capitola (Wed 9:00-12:00)
9. Capitola Public Library (Wed 2:00-5:00)
10. Aptos Public Library (Tues 10:00-1:00)
11. La Manzana Community Center Watsonville (Tues 9:00-2:00)
12. Watsonville Public Library (Wed 11:00-7:00)
13. Jovenes de Antano Hollister (Wed 6pm-8:00pm, Fri 1:00-4:00)
14. La Posada Retirement Community Santa Cruz (ad-hoc)
15. Brookdale Assisted Living Scotts Valley (ad-hoc)
16. Garfield Senior Living Santa Cruz (ad-hoc)

Project SCOUT MARCH Tax Production Totals

Project SCOUT Volunteer Income Tax Assistance Tax Preparation Totals:

- Number of Federal returns prepared – 1530
- Dollar Amount of Federal refunds – \$1,238,123.00
- Dollar Amount of State refunds – \$307,407.00
- Dollar Amount of EITC Claimed – \$402,576.00
- ITIN Count – 46

Dollar Amount of TOTAL refunds – **\$1,545,530.00**

Total money back in the wallets of our clients, including average return cost of \$240.00 – **\$1,912,730.00!**

11.2-1

End of March 2025 Report

With the ongoing tumult coming out of Washington, the IRS is in internal chaos. We lost our IRS point-person, and it took 3 weeks for our new contact person to be assigned. IRS staff are demoralized, confused, and in shock with some of the mandates coming out of Washington, primarily as it concerns those who have ITIN numbers. Going against promises made by the government to those filing taxes with an ITIN, the IRS has agreed to share personal information to DHS which could lead to deportations. Project SCOUT's goal has always been to best serve those we service, above and beyond the numbers of tax returns we accomplish, and in this situation, with the void of guidance from IRS, we are advising those with ITINS to make their own educated decision as to file or not file by connecting with their immigration lawyer or immigration community organization to make the proper decision for them.

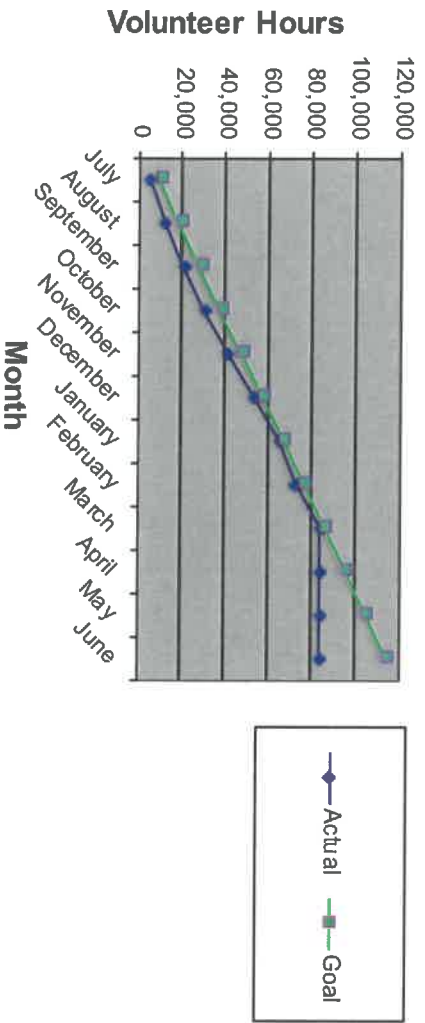
11.2-2

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		VSY	Goal				
Actual	Actual	Goal	Actual	Goal	Actual				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	30,551	37,932	9.05	9.08	9,446	116	7,363	109	
November	41,496	47,415	10.48	9.08	10,945	115	10,355	109	
December	53,761	56,898	11.75	9.08	12,266	116	12,862	109	
January	64,540	66,381	10.32	9.08	10,779	117	10,827	109	
February	72,560	75,864	7.68	9.08	8,020	120	7,179	109	
March	83,506	85,347	10.49	9.08	10,947	121	10,382	109	
April	83,506	94,830	0.00	9.08			10,621	109	
May	83,506	104,313	0.00	9.08			8,487	109	
June	83,506	113,796	0.00	9.08			5,739	109	
TOTAL			79.99		83,506		101,267		

Total VSYS
 Achieved

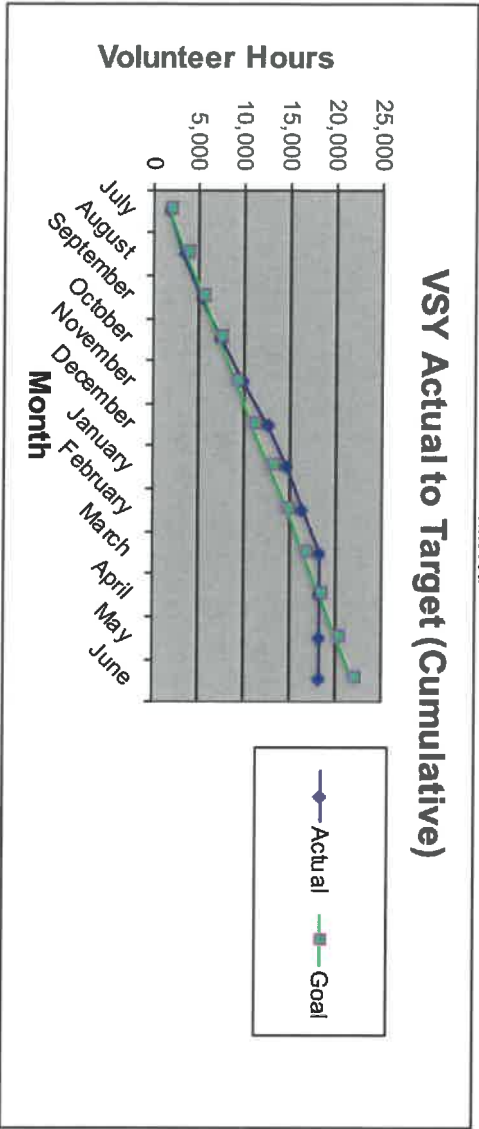
VSYS Actual to Target (Cumulative)



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	Active	FY 23-24	VSYS	Goal	Actuals	Goal
July	1,837	1,827	1.76	1.75	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	16,327	14,616	1.57	1.75	1,643	33	1,802	21				
March	18,315	16,443	1.90	1.75	1,988	30	2,516	21				
April	18,315	18,270	0.00	1.75			2,522	21				
May	18,315	20,097	0.00	1.75			1,940	21				
June	18,315	21,924	0.00	1.75			1,787	21				
TOTAL			17.54		18,315		24,921					

Total VSYS
Achieved





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Death: 2025

the move was complete and they began their new life on the Monterey Bay.

It wasn't long before life settled in and Chuck bought a little house with

Charles J. Molnar

OBITUARY

In the late summer of 1975, Chuck Molnar, was looking for the perfect spot to start a new chapter as a single Dad for his young children, Chris, Erika and Johanna. He had planned to move the family to San Francisco but a casual visit to Santa Cruz changed everything. As he told the story: The beauty of the area was compelling but it was a visit to the main post office where he observed young college students and older retirees interacting and their welcoming spirit that gave him the feeling that this would be home. By September,

even in Santa Cruz. He wanted a successful life for his children and encouraged them to pursue higher education. When Erika and Johanna told their Dad they wanted to be Flight Attendants he suggested that instead they fly the plane. Chris became an Attorney, Erika earned a Masters Degree in Education and Johanna has a PHD in Psychology.

In May of 1987, he married Diane Rodgers, from Richmond, Virginia. Together they created a home for their family not only to embrace all of life's joys including Holidays, birthdays, weddings and celebrations but to build a safe haven where their children, grandchildren and extended family could always know they are welcome and depend on a respite from life's challenges.

Chuck was proud of his career in Advertising that began with J. Walter Thompson, the largest advertising agency in the world where he worked on the Ford Motor account. Later he was the National Advertising Manager for Toyota Motor Car Company. In Santa Cruz, he founded the Chuck Molnar Advertising Agency where his award winning jingles and innovative marketing plans won him accounts on the Central Coast as well as San Jose, Boston , New Orleans , St Louis, Richmond, Virginia, Florida and Texas. Chuck enjoyed his advertising business until his retirement.

Traveling was always an adventure and there were many trips to far away places including his ancestral home in Hungary, Europe, China, the Caribbean, Costa Rica, Hawaii and Mexico. At home he loved to sail his Santana 22, Blue Moon, walk in the Redwoods, attend jazz concerts and enjoy a nice glass of red wine.

Chuck's true character was best defined by the lessons he learned at the University of Detroit Jesuit Highschool. The school's mantra was "A man for others". He carried those values throughout his life and taught his children the importance of being "other centered". His service to the

Vincent DePaul Society and served as a Docent at Henry Cowell State Park. It was his great honor to serve as a Senior Senator for the California Senior Legislature where he produced multiple bills supporting the needs of aging Californians that have become State laws.

He served in the United States Army and was a graduate of Wayne State University in Detroit , Michigan.

He died peacefully at home with Johanna and Diane at his bedside. His last words as he passed from this life were "I love you."

Family was everything to him. He is survived by his wife, Diane of 38 years, Daughter Erika her husband Jaime and their three children, Aidan, Joaquin and Kael, Daughter Johanna granddaughter Gia, Daughter-in-law Neelam and grandchildren Lallita, Valentina and Christian as well as many Molnar and Convissor nieces and nephews.

Chuck was preceded in death by his son Christian who passed away on February 14, 2025, his grandson, Diego, sister Margaret Convissor and brother William Molnar.

Our family is deeply grateful to Hospice of Santa Cruz County and especially Chuck's nurse and Case Manager, Tim Padgett and nurse Rebecca Young whose compassion and care eased a most difficult time for us.

A Memorial Mass will be celebrated on Saturday, April 26 at 2pm at Our Lady Star of the Sea Church located at 515 Frederick Street, Santa Cruz.

In lieu of flowers we request a donation to the Saint Vincent DePaul Society at Our Lady Star of the Sea Catholic Church or Friends of Henry Cowell State Park.

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