SENIORS COUNCIL
CONCILIO DE PERSONAS MAYORES
SERVICE • SUPPORT • ADVOCACY

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 October 15, 2025

10 a.m. – 12 Noon

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

Guests can also join via Zoom
https://us02web.zoom.us/j/86490817703

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

Dial by your location
+1 669 900 6833 US (San Jose)
Find your local number: https://us02web.zoom.us/u/k6W3Ygvu

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 Items Not on the Agenda

10:10 5. Adjournment to Closed Session - Jovenes de Antaño's Lawsuit

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

10:25 6. Reconvene Open Session -CONSENT AGENDA
Approve minutes of the September 2025 Meeting

10:30 7. Advocacy Committee
1. Master Plan on Aging Local Playbook
2. SB 1249 & CDA's Aging 2030 Plan

11:00 8. Annual Board & AAA Advisory Council December meeting

11:10 9. Executive Director's Report
1. Agency Operations
2. SB 1249 & CDA's 2030 Plan
3. Master Plan for Aging & Solutions Summits

11:40 10. Program Reports (written)
1. Foster Grandparent/Senior Companion Program
2. Aging & Disability Resource Connection (ADRC)
3. Volunteer Coordination Project
4. Project SCOUT

11:50 11. Miscellaneous Correspondence & Other Items

12 Noon 12. Adjourn

Next Meeting:

Joint Board & AAA Advisory Council Meeting
December 10, 2025
9:30 a.m. - 12:30 p.m.
Beach Cliff Clubhouse
863 Via Palo Alto, Aptos, 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 Watsonville office with hybrid Zoom broadcast)

September 17, 2025

MINUTES

ADVISORY COUNCIL MEMBERS PRESENT:
Gabriela Trigueiro (City of Santa Cruz)
Steve Clark (City of Scotts Valley)
Scott Freels (City of San Juan Bautista)
Stephanie Auld (Representative of Persons with Disabilities)
Susan Westman (City of Capitola)

ALTERNATES PRESENT:
Sandy Brown (alternate J. Cummings)
Regina Kelbert (alternate K. De Serpa)

ADVISORY COUNCIL MEMBERS EXCUSED:
Kimberly De Serpa (Santa Cruz County Board of Supervisors)
Justin Cummings (Santa Cruz County Board of Supervisors)
Jimmy Dutra (City of Watsonville)
Angela Curro (San Benito County Board of Supervisors)
Mindy Sotelo (San Benito County Board of Supervisors)
Dolores Morales (Councilmember, City of Hollister)
Gerry Jensen (City of Capitola)
Mark Johannessen (At-large, Seniors Commission)

VACANCIES: Representative of Persons with 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; Corey Shaffer, Community Coordinator; Britt Bassoni, Director of Special Projects

OTHERS PRESENT:

Jacques Bertrand; Nadia (LiftLine)

1. **Welcome, Call to Order and Introductions**
Chair Gabriela Trigueiro called the meeting to order at 10:05 AM. Introductions were made.

2. **Additions and Deletions to the Agenda**
None.

3. Receive Announcements from Advisory Council Members

Regina asked that the Santa Cruz County broadband survey be distributed to the Advisory Council.

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

None.

5. Consent Agenda

Advisory Council members were referred to Pages 5-1 to 5-3, minutes of the August AAA Advisory Council meeting.
MOTION, Brown/Clark, to approve the minutes of the August 2025 AAA Advisory Council meeting.
PASSED

6. Advocacy Committee

1. Setting 2025-26 Priorities – Need to reset after energy of Solutions Summits/Master Plan for Aging (MPA). Advocacy Committee selected local, state, and federal objectives (emphasis on local/state for practicality). Discussion of local and state priorities, plus tracking/responding/engaging with CDA's 2030 plan for services.
2. Creating Advocacy Workplan – engaging elected officials expected to be a huge component of success. Avoid starting from scratch each discussion. Invitation for Advisory Council members to participate in or make recommendations for Advocacy, Finance, and Board Development Committees. Need for new BoD members, especially with legal knowledge.

7. Annual Board & AAA Advisory Council December meeting

Combined meeting of November and December AC and BoD meetings; to be scheduled per Doodle poll. Contracted service providers will present and answer questions about programs as part of agenda.

8. Program Reports

1. *Foster Grandparent/Senior Companion Program* – Discussion of defunding threats to program. US Senate discussing at least 50% restoration of funding, still developing. Total federal funding has been ~$1.1 million, plus local match. Currently FGP/SCP covers four counties, which will likely be reduced; Santa Clara participation levels discussed as possible target for additional local match funding, grant assistance.
   There is a need for additional FGP/SCP Advisory Council members.
2. Aging & Disability Resource Connection (ADRC) – Welcome to our new hire for ADRC program coordinator: Crystal Ortiz, Hollister native. She will help reinvigorate community outreach efforts and improve Spanish-language services. Britt reported on ongoing and proposed projects that align with MPA.
3. Project SCOUT – Concern was raised about areas focused on by program; suggestion made to add Capitola location (improved public transit access, lower income area access). Staff noted that there is a focus on lower-income individuals, and sites are scattered across both counties. Also always searching for more opportunities to expand program, which drives volunteerism.
   Noted (8.3-2) that seniors are refusing CalFresh appointment calls from the County because they come in anonymously, as is recommended to avoid scams. Request for HSA to restructure their phone system to avoid this issue.

9. Executive Director's Report

1. Agency Operations – discussed throughout, above.
2. Update on JdA Lawsuit – Last court visit extended trial date to September 29. Working to facilitate direct negotiation between attorneys. Some progress has been made, e.g. JdA

acknowledges some zero-service areas for no reimbursement. Discussion of JdA's performance, reactions, Board behavior, and general relationship to Seniors Council.

3. SB 1249 & CDA's 2030 plan – Passed last year. At the time, 15/33 CA AAA's voted to endorse, even though only 28 were present. 9-1.2 highlights four biggest concerns:
   a. Intrastate funding formula and hold-harmless clause determination. Suggestion to ask Board to weigh in officially.
   b. De-designation of AAAs and counties' right of first refusal. Would have an outsized impact on San Benito County were it to be approved. Both counties report budget concerns that would make a spin-off disastrous. 9.1-3 shows timeline.
   c. Lack of discussion with CDA re: feedback on AAA surveys and creative ideas. Does not seem like a productive process. CDA pushing to publicize scorecards in a way that seems punitive to AAAs. Covers timeliness, data reporting, etc. but does not cover CDA's (poor) performance.
   d. Content of surveys, e.g. descriptions of services that don't match CDA definitions.
4. Master Plan for Aging & Solutions Summits – Progress continues, especially in SBC. Reports and presentations will continue to be made, to elevate awareness and engagement. MPA continues for another 5 years, workgroups will continue to convene periodically.

10. Miscellaneous Correspondence & Other Items

Included in packet. Staff praised Capitola's newsletter. Discussion of Farmers' Market program and rollout of new system.

11. Adjournment

The meeting was adjourned at 11:48 AM.

Minutes prepared by: Zachary Johnson
Next Meeting: October 15, 2025

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PROJECT SCOUT
Tax Counseling Assistance

FALLS PREVENTION PROGRAM
Emergency Response Systems, Assessments & Training

Date: 10-10-25

To: Seniors Council Board of Directors

From: Clay Kempf, Executive Director

RE: October Advocacy Committee Report

Our Advocacy Committee's October meeting will be this coming Monday, so there is no written update, but we'll discuss those efforts and the role of our Board & Advisory Council members during our meetings. The agenda for the meeting is included here, along with the adopted list of our 2025-26 Priorities.

While we focused on our 2025-26 priorities, the discussion also included components for succeeding, and the division of labor among committee members to facilitate achieving that success.

2025-26 PRIORITIES

We broke these down into three components; local, state, and federal.

Local Efforts

The Advocacy Committee recommends that promoting our Master Plan for Aging Local Playbook be our top priority. The Local Playbook and MPA open the door in a variety of ways - connecting with the community - with electeds, with funders, and building upon existing and growing new partners. The Five Bold goals cover numerous topics, and ways to support our Local Playbooks.

State Focus

California's implementation of SB 1249 holds the potential for tremendous damage to AAAs all around the state, including ours. Given the extensive experience and knowledge of our staff and Board members, engaging in SB 1249 and CDA's plans for reconfiguration was identified as an obvious focal point.

MPA efforts also open the door for involvement in state activities related to our local playbooks, including funding augmentations and regulatory changes.

Federal Focus

Besides advocating for the continuation of Americorps/Foster Grandparent/Senior Companion funding, our efforts here will probably be local efforts to protect vulnerable people and programs that are under attack by the Trump Administration.

OCTOBER ADVOCACY COMMITTEE AGENDA ACTION

1.0 Welcome and Introductions

2.0 Additions & Deletions to the Agenda

3.0 Committee Structure & Effectiveness *(continuing)*

4.0 Adopted 2026 Advocacy Priorities *(review)*

1. ***Local Efforts*** - Promotion of the MPA Local Playbook Goals
2. ***State Issues-*** *Implementation of SB 1249 and CDA's Aging 2030 Plans; State Budget efforts*
3. ***Federal Challenges-*** Restoring Americorps, MAGA Threats

5.0 2026 Workplan

1. ***Connecting with Elected Officials*** - who meets with whom?
2. ***Promoting & Presenting the MPA Local Playbooks***
3. ***Messaging*** - a bulleted cheat sheet of talking points

6.0 Next Meeting - Date & Agenda Items

AREA AGENCY ON AGING CSL UPDATE

October 2025

- Leg Proposals

  - 2024

    Note: The Legislature reconvened from Summer Recess on August 18th. The Legislature again went on recess on September 12th and reconvenes on January 5, 2026.

    Three CSL proposals were picked up by legislators by the January 2025 deadline. One proposal (SB707) was passed by the Legislature prior to the September 12th recess. On October 3rd the Governor approved SB707.

    - **SB707** Open meetings: meeting and teleconference requirements - Sen Durazo (SP4 - SS Lipson) October 3, 2025: APPROVED BY GOVERNOR.

  - 2025

    2025 CSL Legislative Proposal were due by June 1, 2025. Attachment # 1 identifies the 2025 legislative proposals that were submitted by the deadline and forwarded to Legislative Counsel.

- Legislative Calendar

  The following are key dates for the month of September and October 2025.

September	12	Interim recess begins
October	12	Last day for Governor to sign or veto bills

October 3, 2025

Attachment # 1 – **2025 Legislative Proposals**

ITSAP #	Member Last	First	Title	S/F	Resubmit
9	Lopez	Helen	Raising PNA	S	Y, multiple years
10	Cox	Mark	Grandparent Caregiver Support Program Info Site	S	
11	Cox	Mark	Senior Child Care Credit	S	
12	Cox	Mark	Caregiving Grandparents: Support	S	Y, AP-1 2024, SB 431 2023
13	Meyer	Milissa	Automated External Defibrillator	S	Y, multiple years
14	Holt	Robert	Aging CA on Fixed Income Exemption from Sales Tax	S	
16	Clough	Robin	(1) Telehealth Across State Lines	S	Y, 2025 SB 508
18	Lipson	Steve	Older Adult Ed Through Public Health	S	Y, 2025 SB 508
19	Lipson	Steve	(2) Brown Act Teleconferencing Rules	S	Y, 2025 SB 239
24	McBrady	Helen	Food Disclosure & Labeling	S	
25	White	Richard	Fall Prevention: Older Adults: Lighting	S	Y
26	White	Richard	Isolation: Electronic Devices: Inventory Requirements	S	
24	**McBrady**	**Helen**	**Food Disclosure & Labeling**	**F**	

S/F: State or Federal Proposal

(1) SB508 as of July 1st became a 2yr bill

(2) SB239 was ordered to the inactive file on June 3rd
SB 707 was approved by the Governor

7-4

Date: 10-10-25

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: Executive Director's October Report

AGENCY OPERATIONS & FUNDING

The shutdown of the United States Government hasn't yet threatened or negatively impacted our daily operations other than by having reduced staff support for programs operated directly by federal agencies. Staffing cuts to the I.R.S. and to the Corporation of National and Community Service/Americorps as part of the Trump Administration's DOGE efforts have already reduced support staff for Project SCOUT's tax assistance programs and for Foster Grandparent & Senior Companion Programs, but the funding for each remains available.

Loss of funding, or freezing of federal funds is a bigger factor in how the shutdown inpacts AAA funds, as the majority of funds for programs such as Meals on Wheels, Legal Services, Information & Assistance, etc. are federal. Despite this, the California Department of Aging (CDA) has shared that they anticipate being able to make payments to AAA into December, which is good news. One of the ways that CDA manages to do this is to accelerate their release of state funding to backfill the absence of federal payments in order to keep AAAs and programs serving vulnerable adults open and operational. However, some AAA funding categories like Title IIIB Supportive services, including legal services, transportation, information & assistance, case management, etc., receive only federal funds and nothing from the state, so we're unclear on how funds supporting those programs will be provided.

AAA Administrator Patty Talbott and I will be attending the Annual C4A Conference during the first week of November in Garden Grove, Calif. Britt Bassoni will oversee daily operations in my absence should anything be needed, but I'll be available by phone and e-mail.

9-1

CALIFORNIA DEPARTMENT OF AGING'S (CDA) AGING 2030 PLANS & SB 1249

CDA's overview of their next steps in their *implementation of SB 1249 and their Aging 2030 plans* are being presented to various groups around the state, including the narrative that they have worked closely with AAAs in the development of these plans. The Department is emphasizing that the changes are necessary to improve older adult services. Among the topics being presented that concern us the most are:

- Revising the Intrastate Funding Formula;
- Designation and de-Designation of AAAs, and the creation of additional AAA Services and Performance Measures;
- Homogenization of AAA services across the state;
- The implication that their plans were developed via feedback received by CDA from AAA surveys.

The California Association of Area Agencies on Aging (C4A) is putting together a presentation describing the concerns AAAs have about the Department's proposals, including some suggestions on how to improve them. Once the C4A presentation is complete and presented to the public, it'll be available for local use as well. We anticipate sharing it with our Board of Directors and AAA Advisory Councils.

The following comments were part of our September packet, but I'm including them here as they're critically important and no information has been shared or discussed on the state level that begins to answer them. For starters, the question of how each single proposed CDA action actually helps to achieve the Master Plan for Aging's Five Bold Goals needs to be not only asked, but discussed, in order to have a thorough understanding of the pros and cons of the changes, and especially to avoid unintended consequences. Much of them focus on facilitating additional reporting and gathering of data - often in a manner that is actually counter-productive to provision of services, and sometimes in ways that set up new barriers to at-risk individuals attempting to seek help. And what is the point in collecting MORE data, when the existing data that's being collected is very rarely used, and often not available when requested?

It is especially aggravating to hear CDA call out AAA shortcomings for supportive services - something that California stopped funding in 2009. In 2008, California allocated $28,661,990 million for Title IIIB Supportive Services. Adjusted for inflation, those dollars would total $55,010,645 today.

If CDA is the champion of older adults that they claim to be, and if they truly want to improve things like reducing waiting lists and speed up responses to Information & Assistance calls, why doesn't their plan highlight this critical loss of revenue (and therefore services)? Why doesn't the plan describe new revenue sources to re-build AAA infrastructure?

Proposed revision to the ***Intrastate Funding Formula*** (included) will result in an annual ***decrease of $234,336 to our PSA*** (12%). 19 of California's 33 AAAs (and 41 of California's 58 counties) would have their funding reduced. PSA 2 (Lassen, Modoc, Shasta, Siskiyou, & Trinity Counties) takes the largest hit; a loss of $1,200,573 per year, or 37% of their funding.

A key component of the resolution of the 1991 IFF lawsuit was that the state had to have a federally approved formula for federal funds, but they had discretion in how state funds are distributed. That discretion allowed the state to include (and modify, as needed) a Hold Harmless Clause to minimize the negative impacts the new formula might have. Via this clause, all AAA's were assured they would receive close to the same level of funding as they had previously. CDA is recommending inclusion of a Hold Harmless Clause in their new formula, but want the Hold Harmless to apply to 2020 funding rather than current levels. 2020 levels pre-date the funding augmentations that have been achieved in the past few years. IMO, this approach would greatly reduce the value of including a Hold Harmless Clause at all.

Timeline: The tentative schedule for CDA to adopt these schedules is included in our packets. Important portions include:

2025-26	Engage Legislature on IFF changes; submit new IFF for Fed approval
2026-28	Introduce new Performance Measures
2027-28	Solicit Applications for AAA Designation
2028-29	Announce Designation of any new AAAs
2029-30	New AAAs begin operations

MASTER PLAN FOR AGING (MPA) LOCAL PLAYBOOKS

We continue to promote and share the content of our MPA Local Playbooks throughout our PSA, with positive responses. Corey and Zach are re-convening the Local Playbook workgroups to facilitate positive movement in achieving the adopted goals. San Benito County had their first quarterly meeting of these groups, and I'm very pleased to share that progress continues to be made regarding the achievement of our local goals. We are especially proud that San Benito County has included several elements to make new housing projects "senior friendly"; a direct result of our Housing for All Ages & Stages workgroup and the active involvement and leadership within that group of County staff and Supervisor extraordinaire Angela Curo.

Santa Cruz County workgroups will meet on Monday, October 27th at 1:30 pm. Each of these meetings will also allow us to augment the playbooks with strategies to address new and emerging needs and take advantage of any developing opportunities.

The Santa Cruz County Master Plan for Aging & Aging Friendly Communities Governance Committee is holding its quarterly meeting on Tuesday, October 28th at 10 am. It'll be the group's first meeting since mid-April, and the first since our local playbooks were finalized at the end of June. We hope to use the Local Playbook Powerpoint Presentation to bring the Governance Committee up to date on our work. The presentation has been shared with County staff for their review and input

Participation in the Santa Cruz County Governance Committee varies greatly from jurisdiction to jurisdiction, and from its initial inception to now. Some cities have City Managers involved, while others send Parks & Rec staff members. Santa Cruz County used to include members of the Board of Supervisors, but none have been included (or invited?) since 2024.

The Aging and Long Term Care Commission of San Benito County continues to serve as the official Local Playbook Advisory Council. Progress is discussed at each monthly Commission meeting, led by Corey Shaffer.

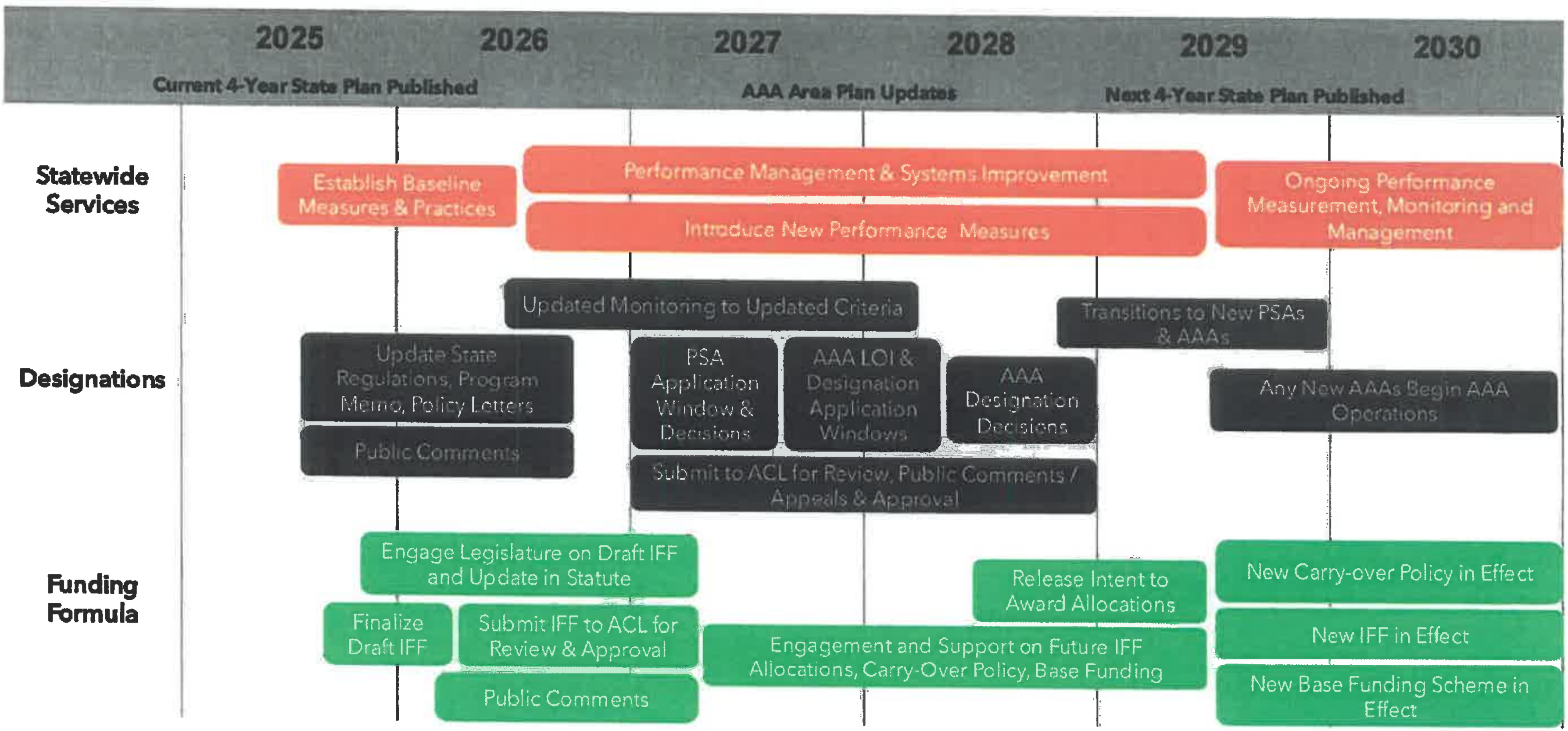
As always, we appreciate all of our community partners, including elected officials, who continue help us to lead the way in these efforts.

PSA	AAA Name	AAA Org Type	60+ Population	1980-2020 60+ Pop Growth	Current Allocation (w/ Current HH)	Option 1 Allocation (no HH)	Option 2 Allocation (w/ 21/22 HH)	Allocation Difference	Allocation % Change	3-year Unspent Avg. (Federal)	Current Allocation per Capita	Proposed Allocation per Capita
1	Area 1 AAA (Del Norte, Humboldt)	NP JPA	41,810	120%	$ 1,340,429	$ 984,376	$ 980,849	[illegible]	[illegible]	$ -	$ 32	$ 23
2	PSA 2 AAA (Lass., Modoc, Shasta, Sisk., Trin.)	NP JPA	81,080	147%	$ 3,259,895	$ 2,066,727	$ 2,059,322	[illegible]	[illegible]	$ 104,262	$ 40 (Highest)	$ 25
3	Passages (Butte, Col., Glenn, Plum., Teh.)	NP JPA	89,155	83%	$ 3,105,477	$ 2,156,565	$ 2,148,838	[illegible]	[illegible]	$ 330,354	$ 35	$ 24
4	Area 4 AAA (Nev., Plac., Sac., Sier., Sutr., Yolo, Yuba)	NP JPA	531,920	227%	$ 12,575,893	$ 12,080,160	$ 12,036,877	[illegible]	[illegible]	$ 304,105	$ 24	$ 23
5	Marin County	County Govt	77,270	164%	$ 1,530,080	$ 1,508,736	$ 1,503,330	[illegible]	[illegible]	$ 52,781	$ 20 (Lowest)	$ 19 (Lowest)
6	SF DAAS	County Govt	187,398	51%	$ 5,316,270	$ 5,095,401	$ 5,077,144	[illegible]	[illegible]	$ -	$ 28	$ 27
7	Contra Costa County	County Govt	258,105	215%	$ 5,250,835	$ 5,773,489	$ 5,752,803	$ 501,968	10%	$ 979,930	$ 21	$ 22
8	San Mateo County	County Govt	171,110	111%	$ 3,859,658	$ 4,143,866	$ 4,129,019	$ 269,361	7%	$ 158,881	$ 23	$ 24
9	Alameda Division on Aging	County Govt	331,765	124%	$ 8,380,645	$ 8,843,542	$ 8,811,858	$ 431,211	5%	$ 919,373	$ 25	$ 27
10	Sourcewise (Santa Clara)	NP	388,590	195%	$ 8,853,028	$ 9,343,724	$ 9,310,245	$ 457,218	5%	$ 388,880	$ 24	$ 25
11	San Joaquin Dept of Aging	County Govt	139,730	167%	$ 3,449,864	$ 3,630,330	$ 3,617,3[illegible]	$ 167,459	5%	$ 425,469	$ 25	$ 26
12	Area 12 AAA (Alpine, Amador, Calav., Marip., Tuol.)	NP JPA	56,889	214%	$ 2,381,940	$ 1,507,186	$ 1,501,786	[illegible]	[illegible]	$ 113,869	$ 42 (Highest)	$ 26
13	Seniors Council of San Benito & Santa Cruz	NP JPA	74,875	123%	$ 1,941,903	$ 1,713,709	$ 1,707,567	[illegible]	[illegible]	$ 29,786	$ 26	$ 23
14	Fresno-Madera AAA	NP JPA	201,615	163%	$ 5,688,218	$ 5,484,212	$ 5,464,563	[illegible]	[illegible]	$ 748,523	$ 28	$ 27
15	Kings-Tulare AAA	Govt JPA	97,780	132%	$ 3,045,262	$ 2,778,531	$ 2,768,575	[illegible]	[illegible]	$ 285,923	$ 31	$ 28
16	Eastern Sierra AAA (Inyo, Mono) FAILS 21/22 HH TEST)	Govt JPA	9,295	120%	$ 1,264,970	$ 944,896	$ 926,904	[illegible]	[illegible]	$ 26,862	$ 136 (Highest)	$ 100 (Highest)
17	Central Coast Commission (San Luis O., Santa Barb.)	NP JPA	170,505	139%	$ 3,765,309	$ 3,562,140	$ 3,549,377	[illegible]	[illegible]	$ 687,654	$ 22	$ 21
18	Ventura County AAA	County Govt	185,315	214%	$ 3,733,540	$ 4,068,087	$ 4,053,512	$ 319,972	9%	$ 13,605	$ 20 (Lowest)	$ 22
19	LA County AAA	County Govt	1,170,744	104%	$ 31,454,746	$ 31,232,451	$ 31,120,547	[illegible]	[illegible]	$ 3,894,547	$ 27	$ 27
20	San Bernardino Dept. of Aging	County Govt	368,820	216%	$ 9,457,147	$ 9,809,716	$ 9,774,562	$ 317,421	3%	$ 723,087	$ 26	$ 27
21	Riverside Office on Aging	County Govt	477,295	288%	$ 10,763,424	$ 11,387,095	$ 11,346,286	$ 582,872	5%	$ 2,543,871	$ 23	$ 24
22	Orange County OoA	County Govt	684,140	208%	$ 14,094,619	$ 15,062,281	$ 15,008,314	$ 913,695	6%	$ 320,802	$ 21	$ 23
23	San Diego Dept. of Aging	County Govt	654,135	168%	$ 13,883,916	$ 15,018,342	$ 14,964,532	$ 1,080,616	8%	$ 1,757,483	$ 21	$ 23
24	Imperial County AAA (FAILS 21/22 HH TEST)	County Govt	32,715	105%	$ 1,328,000	$ 1,082,330	$ 1,101,504	[illegible]	[illegible]	$ 60,433	$ 41 (Highest)	$ 34 (Highest)
25	LA City AAA	City Govt	780498	104%	$ 18,628,904	$ 20,274,121	$ 20,201,480	$ 1,572,576	8%	$ 3,395,910	$ 24	$ 26
26	AAA Lake & Mendocino Counties	Govt JPA	47,665	104%	$ 1,573,561	$ 1,192,825	$ 1,188,552	[illegible]	[illegible]	$ 42,266	$ 33	$ 24
27	Sonoma County AAA	County Govt	133,595	164%	$ 2,626,952	$ 2,716,051	$ 2,705,324	$ 78,372	3%	$ 204,778	$ 20 (Lowest)	$ 20 (Lowest)
28	Napa/Solano AAA	Govt JPA	138,045	204%	$ 3,199,639	$ 3,227,765	$ 3,216,200	$ 16,561	1%	$ 82,151	$ 23	$ 23
29	El Dorado County	County Govt	57,315	354%	$ 1,404,969	$ 1,324,780	$ 1,320,033	[illegible]	[illegible]	$ 71,969	$ 25	$ 23
30	Stanislaus County	County Govt	100,110	163%	$ 2,411,244	$ 2,497,865	$ 2,488,915	$ 77,671	3%	$ 285,547	$ 24	$ 25
31	Merced County AAA	County Govt	43,975	181%	$ 1,368,481	$ 1,264,979	$ 1,260,446	[illegible]	[illegible]	$ 119,729	$ 31	$ 28
32	Monterey County AAA	County Govt	83,500	135%	$ 2,142,489	$ 2,099,199	$ 2,091,677	[illegible]	[illegible]	$ 35,350	$ 26	$ 25
33	Kern County	County Govt	144,395	171%	$ 4,000,164	$ 3,909,300	$ 3,895,293	[illegible]	[illegible]	$ 309,765	$ 28	$ 27
	AVERAGE (MEAN)			160%					-4%		$ 30	$ 27

9-5

4. OUTLOOK (Subject to Change)

California Department of AGING



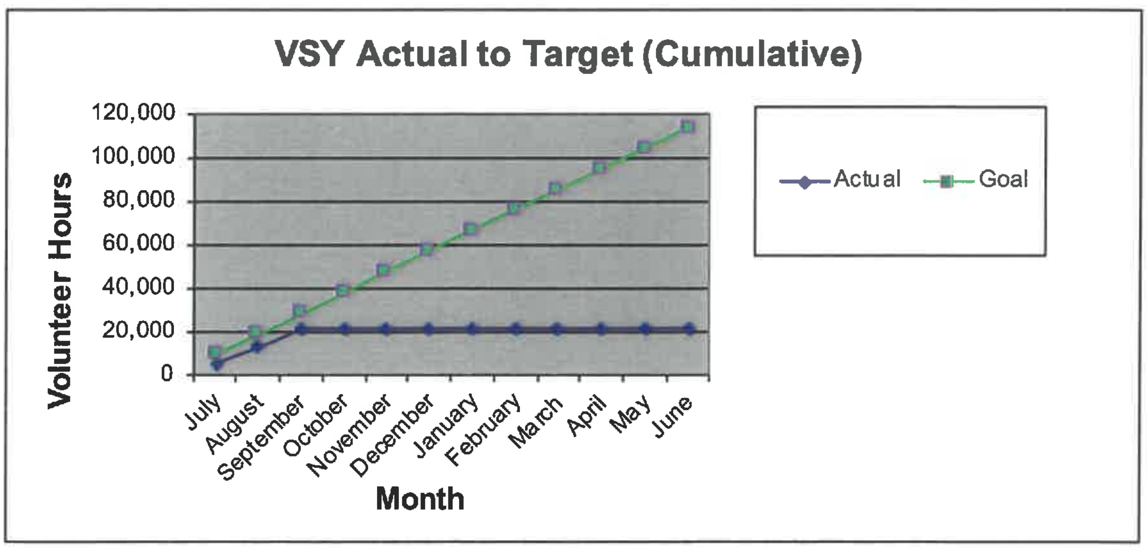
9-6

Project Name: Seniors Council Foster Grandparent Program

Grant Year: 7/1/25- 6/30/26

Month	Cumulative Hours Actual	Cumulative Hours Goal	Monthly VSY Actual	Monthly VSY Goal	Monthly Hours Actual	Monthly Vols. Active	FY 24-25 Actuals	Annual VSY Goal
July	5,499	9,483	5.27	9.08	5,499	123	5,316	109
August	12,921	18,966	7.11	9.08	7,422	126	6,996	109
September	21,577	28,449	8.29	9.08	8,656	129	8,793	109
October	21,577	37,932	0.00	9.08			9,446	109
November	21,577	47,415	0.00	9.08			10,945	109
December	21,577	56,898	0.00	9.08			12,266	109
January	21,577	66,381	0.00	9.08			10,779	109
February	21,577	75,864	0.00	9.08			8,020	109
March	21,577	85,347	0.00	9.08			11,392	109
April	21,577	94,830	0.00	9.08			11,665	109
May	21,577	104,313	0.00	9.08			9,246	109
June	21,577	113,796	0.00	9.08			5,055	109
TOTAL			20.67		21,577		109,918	

Total VSYs Achieved

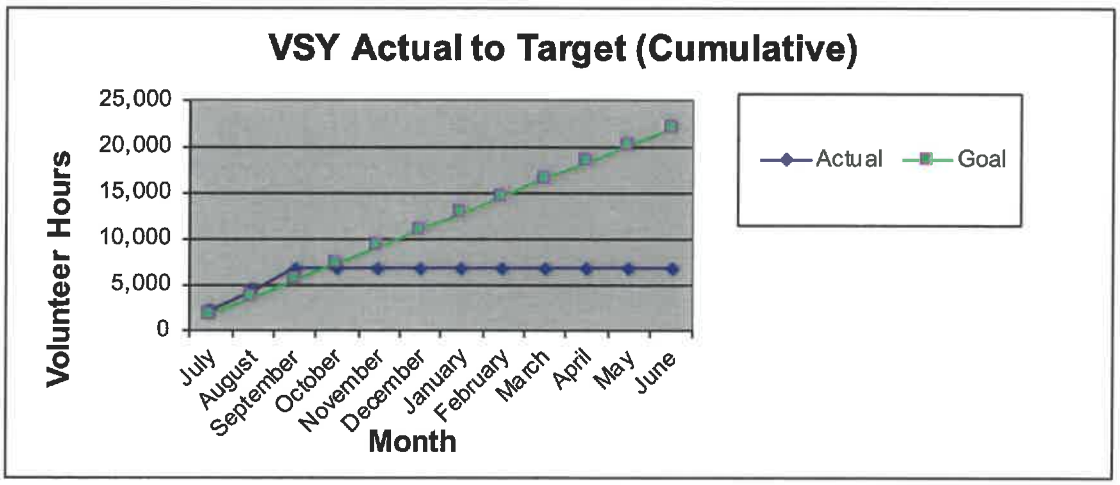


10.1-1

Project Name: Seniors Council Senior Companion Program
Grant Year: 7/1/25- 6/30/26

Month	Cumulative Hours Actual	Cumulative Hours Goal	Monthly VSY Actual	Monthly VSY Goal	Monthly Hours Actual	Monthly Vols. Active	FY 24-25 Actuals	Annual VSY Goal
July	2,283	1,827	2.19	1.75	2,283	30	1,837	21
August	4,405	3,654	2.03	1.75	2,122	30	1,608	21
September	6,840	5,481	2.33	1.75	2,436	31	1,909	21
October	6,840	7,308	0.00	1.75			2,055	21
November	6,840	9,135	0.00	1.75			2,504	21
December	6,840	10,962	0.00	1.75			2,614	21
January	6,840	12,789	0.00	1.75			2,159	21
February	6,840	14,616	0.00	1.75			1,643	21
March	6,840	16,443	0.00	1.75			1,989	21
April	6,840	18,270	0.00	1.75			1,585	21
May	6,840	20,097	0.00	1.75			1,959	21
June	6,840	21,924	0.00	1.75			1,688	21
TOTAL			6.55		6,840		23,547	

Total VSYs Achieved



10.1-2

ADRC of San Benito County
Staff Report – October 2025

The ADRC of San Benito County is in the process of wrapping up 1st Quarter FY25/26 ADRC program reporting and will continue to take partner service reports through Friday – October 24th. Per usual, Britt has reached out to ADRC Network partners with a request to submit their relevant data for the period July 1, 2025 – September 30, 2025, and offered to answer questions and provide assistance as needed.

Of course, and as we have always done, partner providers are encouraged to submit their data via a brief e-mail message, or by sending along their own quarterly program services report to fulfill this request. We encourage partners and their reporting submissions by first acknowledging that they may have only a very limited number of the requested data points, and that is okay. We explain that report asks about consumer demographics and the delivery of designated ADRC core service supports such as Enhanced I&R/A, Options Counseling, Short Term Service Coordination, and Transition Services, some of which the contact person and the organization may or may not provide, and reassure them that this is also okay. Additionally, we recognize that some will only have I&R/A data to report, along with outreach activities and application and eligibility assistance, as examples. These quarterly reporting requests wrap up with the missive to *"please remember that in instances where a direct service support is delivered, we are only seeking a count of - - and any demographic information you can provide for - - unduplicated consumers, which should be the bulk of the individuals served during the first quarter. However, if an individual consumer receives more than one type of service support, they may be counted as an unduplicated or unique consumer for each service."*

The ADRC is also now fully operational and providing direct service supports as a part of its new Title IIIB Information, Referral, and Assistance services, as well as Case Management Services. In the case of the latter of these two, and since Short Term Care Management is already a part of the ADRC's mandated service offerings, the additional funds are helping to financially support what is sometimes a very labor and time intensive service, and also allow the ADRC to continue to support this as a much-needed service for individuals who otherwise may not qualify for Case Management support.

Both service augmentations will help the ADRC be more financial sustainable, while also aligning this local work with State of California goals to make ADRCs the focal point of aging and disabilities Long Term Services and Supports (LTSS) and community supports information and service access. We continue to work with our existing No Wrong Door Network of partner service providers to share information about their services, make referrals, and provide decision-support and access and enrollment assistance to help consumers and caregivers get the services they need. Please provide feedback, as appropriate, to let us and other Network partners know if there are changes to staffing, service offerings, or any waiting lists you may maintain, or if you are regularly receiving service referrals on behalf of individuals who don't meeting eligibility or scope of service criteria. We want to make sure we minimize the number of instances in which consumers are errantly referred to other Network partners, resulting in disappointment and unnecessary frustration.

ADRC Staff had a positive and productive meeting with staff from Martha's Kitchen regarding the delivery of supportive services to older adults attending their Congregate Meals program at the PVMCC, as well as for those individuals receiving weekly meals as a part Martha's Kitchen's Home Delivered Meals service. During the meeting, ADRC staff learned more about Martha's Kitchen's philosophy of meals services providing a gateway to other service supports and interventions, and Martha's Kitchen staff learned more about the ADRC's No Wrong Door Network and the types of service supports and assistance the ADRC can provide through its various community partnerships.

On-going, consumers can continue to schedule appointments for tax preparation and tax counseling with Project SCOUT on regular office days - - currently on Wednesday afternoon, as well as being able to address Medicare and other health insurance questions and enrollment and re-enrollment needs through HICAP staff and volunteers on Wednesday mornings. Drop-in appointments will be supported, as possible, but appointments are very strongly encouraged. ADRC staff are also still in conversation with several other local partners to provide site support, and no-cost office space, to help create mutually beneficial partner and consumer-friendly service experiences.

ADRC staff continue to support the efforts of Seniors Council to share and highlight the results of our collective Master Plan for Aging Local Area Playbook development work and our very own San Benito County MPA Local Playbook! Many of the identified challenges, resources, and identified actions and activities meld nicely with the ADRC's focus on accessible and affordable community based long term services and supports expansion, and the means to navigate services and effectively engage with individuals, organizations, public institutions, and businesses where one chooses to live.

Our recent ADRC hire, Crystal Ortiz, is settling into her new role with the ADRC NWD Network, and she is busy simultaneously serving consumers and also training on-line with BU-CADER to better incorporated person-centeredness in the work she is doing, as well as also receiving additional training focusing on older adult and disability services supports for individuals struggling with mental and behavioral health needs. With her background in Public Health, Crystal is ideally suited to this additional layer of understanding and knowledge-based service supports and sensitivity to consumer needs and other challenges. We are also looking to work more closely with County Behavioral Health services to help consumers identify County service programs and interventions specifically designed and implemented to meet their needs. A huge part of this work is building awareness and lessening the stigma sometime associated with the utilization of such supports, and the ADRC is committed to trying to better inform consumers of the importance and the benefits of addressing individual and family needs in the areas of mental and behavioral health.

The ADRC is continuing discussions with BenitoLink about the possibilities of partnering to provide technology education, support, and training for older adults, with an emphasis on digital safety practices and expanding access to knowledge and understanding, as well as community engagement activities. BenitoLink received a modest grant to help achieve these goals with a number of older adults yet to be determined and approved by the grantor, Spectrum. More information in the form of a public announcement and more details about the associated effort and programming will be forthcoming, but ADRC staff are excited about the opportunity to ply some skills and knowledge we obtained during a couple of earlier technology roll-out, training, and support program efforts utilizing grant funds, training partnerships, and local in-person, as well as virtual troubleshooting and skills-building curriculum.

PROJECT SCOUT

End of SEPTEMBER 2025 Report

Project SCOUT continues offering free tax assistance and Calfresh services in both Santa Cruz and San Benito Counties. Services continue by appointment through the following options:

Free tax preparation and CalFresh appointment options SEPTEMBER 2025:

1. **Project SCOUT online Facilitated Self Assistance: http://tinyurl.com/SCOUTFSA**
2. **Project SCOUT TCE ALL (Remote and ad-hoc for at-risk seniors and disabled)**
3. **Aptos Public Library (Last Thursday of the month by appointment)**
4. **Watsonville Senior Center (by appointment)**
5. **Watsonville Public Library (Last Wednesday of the month by appointment)**
6. **San Juan Bautista Library (Once per month by appointment)**

Project SCOUT SEPTEMBER 2025 Production Totals*

Project SCOUT Volunteer Income Tax Assistance Tax Preparation Totals:

- *Total calculated* Number of Federal returns prepared for season– 1962*
- Dollar Amount of Federal refunds – $1,456,367.00
- Dollar Amount of State refunds – $347,339.00
- Dollar Amount of EITC Claimed – $463,218.00

Dollar calculated* Amount of TOTAL refunds – **$1,803,706.00**
Total money back in the wallets of our clients, including average return cost of $220.00 – **$2,235,346.00**

***Due to IRS staff shortages, there is currently no IRS (SPEC) representative to support our VITA / TCE programs, and the above data is the best calculation of our totals as we have not received official IRS data since June 2025.**

10.4-1

Project SCOUT SEPTEMBER 2025 CALFRESH Services*

- Number of Senior/disabled clients assessed for services **TOTAL – 56**
- Number of Senior/disabled clients assessed for services (Santa Cruz County)– 51
- Number of Senior/disabled clients assessed for services (Santa Benito County)– 5
- Number of clients who completed Calfresh application in Santa Cruz County – 19
- Number of clients assisted with Calfresh in San Benito County – 2
- Number of clients who completed Calfresh application **TOTAL – 21**

Project SCOUT SEPTEMBER 2025 Services Highlights:

Project SCOUT completed helping a woman who due to issues with short-term memory, has had issues with following up with IRS letters and sending information as she had been asked. Project SCOUT assisted her for years 2022 to 2024 for which he should have received over $12,000.

The taxpayer had received refunds, but then received letters from the IRS that she owed over $6,000.00 because her dependents had also been claimed by the biological father. At the point of our last meeting, she owed over $7,000.00 as a result of accrued interest.

We helped the client navigate the letters and create a packet so she could show IRS that it is indeed her who rightfully needed to claim dependents and assisted set up an appointment at local IRS office in San Jose to plead her case. We are confident that this will complete the process and that the client will be able to keep her money.

Project SCOUT SEPTEMBER 2025 CalFresh Recap:

Project SCOUT has mostly finished assessment of seniors and those with disabilities that have come to us for free tax services during 2025. Most of those served once more for CalFresh services by Project SCOUT have been incredibly happy. As an example, Mr. R.W. was "Very thankful for our persistence and help with other matters beyond CalFresh as well". Another client, Ms. V. R. said that she was "Super impressed with how we kept following up with her to get approved for CalFresh". Even though she only will receive $24 a month, she said that our follow up really helped her to follow through and get it.

10.4-2

Paper checks going away soon for Social Security, most federal payments

Consumer advocates say the phase-out could create headaches for seniors and other beneficiaries who don't move to direct deposit or other options by Sept. 30.

September 16, 2025

By Shannon Najmabadi and Taylor Telford

The Treasury Department will stop issuing paper checks for tax refunds, Social Security payments and most other federal programs on Sept. 30 as part of an executive order aimed at modernizing the government.

While experts widely agree that electronic payments are faster to process, and less susceptible to fraud and theft than paper checks, advocates who work with the small percentage of those who still receive checks say the change is being rushed out and worry that some beneficiaries won't learn of it unless their payment doesn't show up.

More than 5 million people receive physical checks from the government, a group composed largely of seniors, people with disabilities, immigrants and others without bank accounts — "populations that may be more challenged by having to change the way they receive their federal benefits," said Jennifer Tescher, founder of the nonprofit Financial Health Network.

Reducing paper checks has been a long-standing bipartisan goal, Treasury officials said. Checks are much more likely to be reported lost, stolen or altered or returned undeliverable compared with electronic payments, the officials said. Check fraud has increased in recent years: Banks issued 680,000 reports of check fraud in 2022, nearly double that of 2021, according to a White House fact sheet.

Plus, electronic payments are more cost-efficient — less than 15 cents per transaction compared with 50 cents to issue a check. The government estimates the move will save millions of dollars a year.

In July, Treasury began mailing beneficiaries information about the Sept. 30 deadline with instructions about alternative payment options. The administration also is sending mass emails, posting on social media and updating call-center scripts to raise awareness about the change, officials said.

11-1

But Kathleen Romig, a former Social Security Administration official who now works for the left-leaning Center on Budget and Policy Priorities, said people still might not be aware they need to sign up for an alternative payment method or be able to do so quickly.

The government has provided a phone number that people without bank accounts can call if they'd like to sign up for a Direct Express card, a debit card-like offering that can be reloaded by the government. Romig said she called the number in late August: "I couldn't get through to a person," she said.

"Some people are just not going to be able to manage the steps," Romig said.

There also could be complications down the line if people don't fully understand how Direct Express cards work, some advocates said. Millions of debit cards with stimulus money were mailed out during the coronavirus pandemic. But they were delivered in plain envelopes without government insignia, and some Americans mistook them for junk mail.

Congress passed a law in the 1990s to phase out checks for many payments, though not tax refunds. Although exempt, the overall effort has been largely successful: About 94 percent of all refunds, or about 81 million out of 86 million payments, were issued electronically in the 2025 filing season. Fewer than 1 percent of the people receiving payments from the Social Security Administration, Railroad Retirement Board or Defense Department get paper checks, according to agency spokespeople.

"This is really the toughest nut to crack: this last 1 percent or less than 1 percent," Romig said.

The administration has said that waivers will be available for beneficiaries with certain hardships, such as remote living arrangements or mental impairments, though they will be granted in "rare circumstances." Adults 90 and older also can request an exemption. It's unclear whether the same criteria and process will be used for tax refunds.

The Treasury Department is "committed" to helping "address financial access for unbanked and underbanked populations," officials said.

A spokesperson for the Social Security Administration said it is "proactively" contacting beneficiaries to alert them of the change. "Where a beneficiary has no other means to receive payment, we will continue to issue paper checks," the spokesperson said.

The Defense Finance and Accounting Service also will keep issuing paper checks "when necessary" and will increase its communications with payees, said agency spokesperson Steve Burghardt.

People who receive paper checks must typically self-certify that they face certain hardships. They are often lower-income individuals or lack identification cards and don't have a history of good credit or meet other requirements needed to open a bank account, advocates say.

11-2

Maybe "they don't have enough money to do an initial deposit or they don't have reliable transportation to get them to the bank to get things set up," Romig said.

Others are skeptical of electronic payments because of the potential for digital scams, said Daniel Hauffe of the Association of International Certified Professional Accountants.

Eduardo Santana, who leads a program that provides free tax help to older adults and low-income people, said about 40 percent of people assisted this past tax season opted for direct deposit or direct debit. The program is offered by the Seniors Council of Santa Cruz and San Benito Counties.

It's "going to create a lot of stress and a lot of anxiety," he said of the change. "I don't think that there's going to be more people hired today at Social Security or at the IRS to be able to answer the calls that are going to be coming in" asking where refunds or other payments are.

Maria — a seamstress and a single mother in California — has a bank account but said she generally avoids using it because she worries it will put her and her family at greater risk of attracting scrutiny from immigration authorities (her last name is not included because she is undocumented). The 34-year-old likened her tax refunds to a financial lifeline that helps cover expenses such as rent, utilities and clothing for her four children.

"It feels like they're shutting the doors around us on all sides," she said.

Romig said the government should concentrate on getting new enrollees signed up for electronic payments, rather than going to "extraordinary effort" to change the process for "grandma, who's 95 years old."

"Maybe for some of these cases, it makes sense just to leave well enough alone," she said.

Julie Zauzmer Weil contributed to this report.