#### **AREA AGENCY ON AGING**





#### FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM

Monterey, San Benito, Santa Clara & Santa Cruz Counties

PROJECT SCOUT
Tax Counseling Assistance

#### AGING & DISABILITY RESOURCE CONNECTION

Navigating the San Benito County Senior & Disability Services Network

# Seniors Council Board of Directors and AAA Advisory Council Annual Combined Meeting

December 10 9:30-12:30 (lunch afterwards)

Beach Cliff Clubhouse

863 Via Palo Alto, Aptos, CA

https://us02web.zoom.us/j/81931049538

Meeting ID: 819 3104 9538

One tap mobile
+12532158782,,81931049538# US (Tacoma)

Dial by your location +1 669 900 6833 US (San Jose) Find your local number: https://us02web.zoom.us/u/kclTMKXHq5

# <u>AGENDA</u>

- 9:30 a.m. 1. Welcome, Call to Order and Introductions
  - 2. Additions & Deletions to the Agenda
  - 3. Receive Announcements from Board Members
  - 4. Comments from Members of the Public on Items Not on the Agenda
- 9:40 5. Approve minutes of the October 2025 Advisory Council Meeting Approve minutes of the October 2025 Board Meeting
- 9:45 6. Dismissal of Jovenes de Antaño's Lawsuit Consent Items
- 10:00 7. Committee Reports
  - 1. Finance Committee

**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

- 2. Advocacy Committee
  - a. Implementing 2025-26 Priorities
  - b. Outreach & Strategic Elected Visits
- 3. Executive Committee
  - a. December Agency Holiday Schedule
  - b. Board Orientation Training
- 4. Nominating & Board Development
- 10:10 8. Approve Award of One-Time Only Funding
- 10:15 9. Contracted Service Provider Presentations (7 min each, plus 3 minutes for multiple programs)

### Both Santa Cruz & San Benito County Programs

- Health Projects Center Family Caregiver Support Programs
- Senior Legal Services
- Project SCOUT
- Foster Grandparent/Senior Companion
- Volunteer Center Empowered Aging
- Senior Network Services
  - HICAP, Ombudsman, Case Management, I & A in Santa Cruz County only

# 11:15-11:25 STRETCH & SNACK BREAK

# Santa Cruz County Only Programs

- Community Bridges -
  - Meals on Wheels Santa Cruz; Lift Line
- California Grey Bears
- Family Services Agency
  - Sr. Peer Counseling, I-You Venture

# San Benito County Only Programs

- Martha's Kitchen
- San Benito County Volunteer Coordination
- ADRC (I&A, Case Management)

# **Board & Advisory Council QUESTIONS for Programs**

- 12:20 10. Program Reports (written)
  - 1. Foster Grandparent/Senior Companion Program
  - 2. Aging & Disability Resource Connection (ADRC)
  - 3. Volunteer Coordination Project
  - 4. Project SCOUT
- 12:25 11. Miscellaneous Correspondence & Other Items
- 12:30 12. Adjourn to Lunch

# Next Meetings: AAA Advisory Council Meeting

Weds, Jan 14, 2025 10 a.m. - 12 noon 175 Westridge Dr., Watsonville, CA

## **Board of Directors New Member Orientation**

10 am to 12 Noon Thursday, December 18, 2025 175 Westridge Dr., Watsonville, CA

# **Board of Directors January Meeting**

Thurs, Jan 15, 10 a.m. - 12 Noon 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.



SERVICE + SUPPORT + ADVOCACY

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

(Held in person at Watsonville office with hybrid Zoom broadcast)

#### OCTOBER 15, 2025

#### MINUTES

#### ADVISORY COUNCIL MEMBERS PRESENT:

Steve Clark (City of Scotts Valley) Tara Ireland (Empowered Aging; AAA Service Provider) 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, Zoom)

#### ADVISORY COUNCIL MEMBERS EXCUSED:

Kimberly De Serpa (Santa Cruz County Board of Supervisors) Justin Cummings (Santa Cruz County Board of Supervisors) Gabriela Trigueiro (City of Santa Cruz) 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) Scott Freels (City of San Juan Bautista) 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; Zach Johnson, Seniors Council Administrative Services Officer; Britt Bassoni, ADRC Director

#### OTHERS PRESENT:

Corrine Jones (Senior Network Services, Zoom), Tami Aviles (Board of Directors, Zoom), Joshua Mercier (Zoom), Antonio Rivas (Board of Directors)

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

Acting Chair Steve Clark called the meeting to order at 10:04 AM. Introductions were made.

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

None.

### 3. Receive Announcements from Advisory Council Members

Santa Cruz County has established a fraud alert system that notifies residence of property deed theft, a growing national issue.

Identity fraud is also a growing concern, especially for seniors. Regina said District Attorney has a program to present scam/fraud prevention tips to groups.

Today is the first day of MediCare enrollment; there will be lots of mailers, including many fraudulent ones. HICAP/Senior Medicare Patrol working to prevent fraud. Stephanie called for additional focus on the similar needs of disabled individuals.

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

Senior Prom taking place this weekend, as well as Uncork Corralitos; Antonio shared flyers for the event.

#### 5. Closed Session (done as Item 8.1)

Discussion of developments in ongoing Jovenes de Antaño lawsuit.

#### 6. Consent Agenda

No quorum present, will be voted on in future.

#### 7. Advocacy Committee

Discussion of AC project to refocus efforts and who should be members. Packet 7-1 includes list of priorities at local, state, and federal levels. Scheduling visits to County Supervisors, CAOs, and other elected officials; list created, assigning Board members and AC members to each name.

- 1. <u>Master Plan for Aging Local Playbook</u> provides framework for local and state efforts, including advocacy.
- 2. SB 1249 & CDA's Aging 2030 Plan Discussion of potential impacts of proposed changes, as well as past performance of non-profit AAAs compared to County-run AAAs. Eg., defunding of Information & Assistance programs leading to "poor performance" complaints. Question of how to communicate to public the concerns and threats to programs. Antonio offered to communicate to CDA director when they meet in Sacramento. Concern raised about increased data reporting requirements from SB 1249. New Governor and CDA leadership changes will also complicate the field, worth monitoring.

#### 8. Annual Board & AAA Advisory Council December Meeting

Cancellation of both bodies in November and December, to convene in December for a joint meeting. Per requests, focus will be on service providers and their activities, and how to maintain/grow/cross-pollinate programs.

December 10 at Rio Del Mar Clubhouse, lunch included; 9:30 AM - 12:30 PM.

#### 9. Executive Director Report

Update on Seniors Council activities at Pauline Valdivia Memorial Community Center, interactions with other agencies.

Highlights of CDA plans on 9-3.

#### 10. Program Reports (written)

- 1. Foster Grandparent/Senior Companion Program
- 2. Aging & Disability Resource Connection (ADRC)
- 3. Volunteer Coordination Project
- Project SCOUT Question about IHSS low-income employees' and recipients' lack of training/knowledge about their own benefits e.g. 401Ks; request for focus on populations closer to downtown Santa Cruz.
  - Discussion of current and proposed activities and staffing/volunteering levels.

# 11. Miscellaneous Correspondence

Reminder to get flu/COVID booster, if available. Recognition of Eduardo's quote in the Washington Post.

### 12. Adjournment

The meeting was adjourned at 11:37
Minutes prepared by: Zachary Johnson
Next meeting: December 10, 2025 || 9:30 AM – 12:30 PM

#### **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

5.2-1

# SENIORS COUNCIL BOARD OF DIRECTORS

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

#### October 16, 2025

#### **MINUTES**

#### BOARD MEMBERS PRESENT:

Tami Aviles (President); Wayne Norton (Vice-President); Jane Schwickerath (Treasurer); Mark Trabing (Secretary); Pam Arnsberger; Mickie Luna; Lisa Berkowitz; Antonio Rivas; Cathy Cress

#### **BOARD MEMBERS EXCUSED:**

Gwen Yeo

#### STAFF PRESENT:

Clay Kempf (Executive Director); Zach Johnson (Administrative Services Officer); Corey Shaffer (Community Coordinator); Cathy Colvard (Fiscal Officer); Crystal Ortiz (ADRC); Eduardo Santana (Project SCOUT); Patty Talbott (AAA Administrator)

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

Meeting was called to order at 10:02 AM. Introductions were made.

### 2. Additions & Deletions to the Agenda

None

### 3. Receive Announcements from Board Members

Marissa Ledesma has resigned citing time commitments.

Lisa will be taking a three-month leave beginning in December.

Event at Pauline Valdivia Memorial Community Center went well and had good attendance.

Aptos used clothing store encourages us to apply for \$2K grant, Mark will provide details to Resource Development Committee.

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

None.

#### 5. Closed Session

Discussion of ongoing Jovenes de Antaño lawsuit.

#### 6. CONSENT AGENDA

MOTION, Norton/Rivas, to approve minutes of September 2025 Board Meeting. PASSED.

175 Westridge Dr., Watsonville, CA 95076 www.seniorscouncil.org

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#### 7. Committee Reports

- 1. Committee Appointments no updates. Request for adding dates of joining BoD to roster.
- 2. Finance Committee no meeting, no updates. Down to 2 Board members on this committee.

Reminder to make donations before the end of the year.

#### 3. Advocacy Committee

Met Monday (holiday) so attendance was lighter than normal. Committee has become unfocused and is reassessing goals and processes.

- a. <u>Implementation of 2025-26 Priorities</u> Packet page 7.3-1, list of local/state/federal priorities and issues. Focus on promoting Local Playbook, CA CDA SB 1249 implementation, and Aging 2030 plan. More MPA presentations to be made soon (despite concerns from Santa Cruz County officials).
- b. Outreach & Strategic Elected Visits Committee prepared list of elected officials and city managers, and assigned members to meet with them directly. Request to Board to sign up for additional meetings.

#### 4. Executive Committee

- a. December Agency Holiday Schedule Closed December 22-26, Open December 29, 30, 31, Closed on Jan 1 and 2. MOTION, Arnsberger/Norton, per packet page 7.4-1, to approve recommended holiday office schedule and closures. PASSED.
- b. <u>Board Orientation Training</u> scheduled for Dec. 18, 10 AM-12 PM, in Hybrid format. Guests and potential Board members are welcome!
- 5. Nominating & Board Development search for Santa Cruz members continues, ideally from SLV/Felton area. One potential member in queue: Connie Padron. Another potential member per Pam; however, they are employed by a service provider. Discussion of possible conflicts and bylaws.
- 6. California Senior Legislature included in packet page 7.3-3. Annual session meeting next week, and October 27 + 28 in Sacramento.

# 8. Annual Board & AAA Advisory Council December Meeting

Date set for December 10 at Gwen's Clubhouse, 9:30 AM – 12:30 PM. Emphasis will be on service provider presentations and Q&A.

# 9. Executive Director's Report

- 1. Agency Operations -
- 2. SB 1249 & CDA's 2030 Plan Ongoing theme of current operations. CDA proposing public 'report cards' for various AAA metrics. Clay suggested need for report card for CDA, citing delays in plan approvals, etc. Proposed presentation to California Commission on Aging re: concerns with CDA performance/demands. Discussion of importance of funding programs and services, especially Information & Assistance programs. Dept. of Aging accelerating state dollars to maintain full funding, for now; however, no state funding for Title IIIB.
- 3. Master Plan for Aging & Solutions Summits -

#### 10. Program Reports (written) –

- 1. Foster Grandparent/Senior Companion Program
- 2. Aping & Disability Resource Connection (ADRC) finishing quarterly reports; impacted by loss of JdA service units and short staffing. Anticipating variance report from CDA. Open enrollment also driving activity.

5.2-2

- 3. <u>Volunteer Coordination Project</u> Signups by both volunteers and organizations continuing. Meeting with Hazel Hawkins upcoming. Completed successful tech help/support session.
- 4. Project SCOUT Data provided from in-house sources while IRS is closed; details in packet. October plans: recruiting old+new volunteers for certification, also delayed by IRS. Request for breakdown by place of residence.

#### 11. Miscellaneous Correspondence & Other Items

Eduardo was quoted in Washington Post article, included on 11-3.

New transport provider in SBC has zero waitlist and is using all vehicles.

Martha's Kitchen also has zeroed waiting list, demand increasing.

Watsonville Senior Center will be receiving new windows, a mural, and expanded parking.

Several other renovations around the Watsonville area in progress as well.

Latino Coalition of SBC was awarded \$200,000 grant from Office of Emergency Services.

Comes with requirement to hold event for senior citizens in 2026. Opportunity for other orgs to fundraise.

#### 12. Adjourn

The meeting was adjourned at 12:02 PM

Next Meeting: December 10, 2025  $\parallel$  9:30 AM - 12:30 PM Board Orientation: December 18, 2025  $\parallel$  10 AM - 12 PM

Minutes prepared by: Zachary Johnson

#### **AREA AGENCY ON AGING**

SENIORS COUNCIL
CONCILIO DE PERSONAS MAYORES

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#### FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM

Monterey, San Benito, Santa Clara & Santa Cruz Counties

# PROJECT SCOUT Tax Counseling Assistance

# AGING & DISABILITY RESOURCE CONNECTION

Navigating the San Benito County Senior & Disability Services Network

Date: 12-4-25

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: Dismissal of Jovenes de Antaño lawsuit vs. Seniors Council/AAA

The attached document from the Superior Court of San Benito County is the official notice of Jovenes de Antaño dismissing their lawsuit against the Seniors Council.

This memo provides an overview of the various components of our contracts with JdA, JdA's performance in each category. and the subsequent funds paid. The points listed were finalized with Jovenes on 10/21/25

# Jovenes Final Contracted Services Fiscal Review Fiscal Year July 1, 2024 - June 30, 2025

Article 21, Section A 3 contract signed by JdA Executive Director Danny Barrera and Seniors Council Executive Director Clay Kempf states:

3) The AAA reserves the right to refuse payment to the CONTRACTOR or disallow costs for any expenditure, as determined by AAA to be: out of compliance with this Contract Agreement, unrelated or inappropriate to Contract Agreement activities, when adequate supporting documentation is not presented, or where prior approval was required but was either not requested or not granted.

Funds paid to Jovenes BEFORE the June 2025 lawsuit was filed:

 Total Area Plan:
 \$164,426

 ADRC
 \$36,162

 TOTAL PAID
 \$200,588

#### **Nutrition Modernization Act**

Total Potential Contracted Amount: \$55,628

Allowable costs: \$0. No service units provided, no claims made by Jovenes

Notes: Funding allocated to augment baseline nutrition services (Title IIIC1 & IIIC2) and increase senior meals. JdA failed to meet their baseline contract.

#### Aging & Disability Resource Connection (ADRC)

Total Contracted Amount: \$53,000

Allowable costs: \$38,624 Contract ended prematurely

Notes: Payment mutually stopped after resignation of designated Jovenes staff in late March, and no replacement hired by end of contract. Service units only reported for the first half of the year.

#### Title IIIB

Total Contracted Amount: \$48,000 \$23,000 Information & Assistance

\$20,000 Transportation \$5,000 Case Management

Local match submitted in JdA Budget: \$50,564

Service Units Reported:

Information & Assistance: 0 (2,500 contracted)
Transportation: 0 (3,760 contracted)
Case Management: 7 (125 contracted)

Allowable costs: \$280 (7 Case Management hours at \$40 per hour)

Notes: invoices of \$33,844 (including \$3,033 of unallowable costs) not payable due to lack of reported services.

#### Title IIIC1

Total Contracted Amount: \$132,915 Local match submitted in JdA Budget: \$92, 538

Service Units Reported:

Congregate Meals: 10,036 (12,000 contracted; only 83.6% delivered)

Allowable costs: \$122,311 (contract amount minus unallowable costs reported)

Notes:

Accepting 83.6% performance as meeting contract

Not penalizing agency for six weeks of non-compliant meals as the problem was corrected.

\$8,067 of unallowable costs in July-Oct 2024 deducted from payment

2% reduction (\$2,537) of unallowable Nov-June 2024-25 costs based on COSTS of samples of time period rather than error rate (43% of samples had errors)

Allocation of expenditures between various funds not provided.

Title IIIC2

Total Contracted Amount: \$214.604 Local match submitted in JdA Budget: \$139,318

Service Units Reported:

Home-delivered meals: 26,852 (32,500 contracted; only 82.6% delivered)

Allowable costs: \$185,084 (Contract amount minus unallowable costs)

Notes:

Accepting 82.6% performance as meeting contract

Not penalizing agency for six weeks of non-compliant meals; the problem was corrected \$12,799 of unallowable costs July-Oct 2024; 6% (\$16,721 unallowable cost deduction Nov-June 2024-25; 23% error rate in Nov Jun sample).

#### Title IIIE

Total Contracted Amount: \$42,528 Local match submitted in JdA Budget: \$15,000

Service Units Reported:

IIIE Case Management 61 (120 contracted; 51%)
IIIE I & A & Outreach 185 (175 contracted; 106%)

Information Services

Caregiver Training

Respite in Home

Supplemental Consumable Supplies
Supplemental Home Modifications
Supplemental Assistive Technology
Supplemental Caregiver Assessment

163 (173 contracted, 106%)
0 (25 contracted; 0%)
341 (900 contracted; 38%)
0 (20 contracted; 0%)
0 (8 contracted; 0%)
1 (5 contracted; 20%)
14 (100 contracted; 14%)

Allowable costs: \$19,716\* Full costs of assigned employee; actual costs of respite \*Agency must document mandated 25% (\$6,572) local match specific to Title IIIE.

Notes: Reported respite service units appear to be overstated as costs don't match Full acceptance of staff costs despite very poor contract performance.

Copies of two checks provided as evidence of local match, but no documentation of the approval of the two funders to use funds for such. Previous statements of co-mingling funds made by JdA Executive Director and Board Treasurer pressured the AAA to receive documentation of approval of funders, along with submitting a letter of concern to the JdA Board of Directors. Jovenes initially submitted checks from Intero Foundation and Community Foundation of San Benito County (CFFSBC) as documentation of match. However, the CFFSBC grant clearly restricted the funds use to senior meals. Jovenes then sent the grant narrative for a third grant (San Benito County Health Trust). This contract also limited the expenditures to meals programs, and puts JdA out of compliance with those two grants as well as their work with the AAA. Jovenes then replaced all three of those grants as required match and submitted documentation of fundraising activities that met the match requirement.

#### **Final Status:**

costs:
\$ 280
\$122,311
\$185,084
\$. 19.716
\$327,391
\$ 38,624
\$346,299
\$200,588
\$165,427

<u>Additional Notes</u>: These numbers are based on multiple resubmissions from Jovenes on previous errors and/or overdue items. Where practical, the methods of determining allowable costs were the ones resulting in greater payment to Jovenes.

We continue to recommend that Jovenes de Antaño hire a CPA firm to conduct an Independent Financial Audit of their records, especially regarding FY 2024-25.

Additional Observations: Our entire fiscal team was involved in trying to unravel the reports and documents received from JdA regarding their 2024-25 FY operations. AAA Administrator Patty Tabott and AAA Registered Dietician Caren Dix were also involved. Each of those five professionals found problem areas, often of a serious nature, and worked closely with JdA staff (when they were willing and/or allowed) in attempts to correct the problems and keep issues of concern out of the public eye. Numerous extensions were granted to JdA staff to meet requested deadlines. Were it not for these efforts by AAA staff, Jovenes funding would be tens of thousands of dollars less.

Ultimately, the funds paid to JdA to result in the dismissal of this lawsuit were exactly the same as what would have been paid in its absence. These funds would have been disbursed to JdA several months earlier, but the Temporary Restraining Order filed by JdA prohibited us from releasing the funds to anyone, including Jovenes itself.

Seniors Council staff recommends against considering JdA for future funding unless and until an improved infrastructure is in place and the organization completes an Independent CPA Audit with positive results.

ATTORNEY OR PARTY WITHOUT ATTORNEY STATE BAR NU	JMBER: FOR COURT USE ONLY
NAME: S. Craig Cox (SBN 3106510)	
FIRM NAME: JRG ATTORNEYS AT LAW	
STREET ADDRESS: 318 Cayuga Street	
CITY: Salinas STATE: CA ZIP COD	E: 93901
TELEPHONE NO.: (831) 754-2444 FAX NO.: (831) 2	
	Superior Court of California,
E-MAIL ADDRESS: craig@jrgattorneys.com	
ATTORNEY FOR (Name): Plaintiff	County of San Benito
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BENITO	10/24/2025 at 03:42:28 PM
street address: 450 Fourth Street	By: Mary Salmeron, Deputy Clerk
MAILING ADDRESS:	by . Wary Samileron, Depoty Clerk
CITY AND ZIP CODE: Hollister, CA 95023	
BRANCH NAME:	
PLAINTIFF/PETITIONER: Jovenes de Antano del	Condado
DEFENDANT/RESPONDENT: Seniors Council, et al	The state of the s
DEFENDANT/RESPONDENT. SETTIOLS COURTELL, et al	
REQUEST FOR DISMISSAL	CASE NUMBER:
	CU-25-00147
A conformed copy will not be returned by the clerk unless a r	nethod of return is provided with the document
This form may not be used for dismissal of a derivative action	
	or a class action of or any party of cause of action in a
class action. (Cal. Rules of Court, rules 3.760 and 3.770.)	
<ol> <li>TO THE CLERK: Please dismiss this action as follows:</li> </ol>	
a. (1) X With prejudice (2) Without prejudice (3)	☑ Without prejudice and with the court retaining
	jurisdiction (Code Civ. Proc., § 664.6)
b. (1) Complaint (2) Petition	
(3) Cross-complaint filed on (date):	by (name):
(4) Cross-complaint filed on (date):	by (name):
(5) X Entire action of all parties and all causes of action	
(6) X Other (specify):* Each side to bear t	heir own costs
2. (Complete in all cases except family law cases.)	
The court did X did not waive court fees and costs for a p	arty in this case. (This information may be obtained from
the clerk. If court fees and costs were waived, the declaration on	the back of this form must be completed).
Date: October 24, 2025	Con laws it was
S. Craig Cox	5-110V160
(TYPE OR PRINT NAME OF ATTORNEY PARTY WITHOUT ATTORNEY)	(SIGNATURE)
* If dismissal requested is of specified parties only, of specified causes of action only, or of specified cross-complaints only, so state and identify the parties, causes of action, or cross-complaints to be dismissed.	Attorney or party without attorney for: Plaintiff
causes of action, or cross-complaints to be dismissed.	X Plaintiff/Petitio er Defendant/Respondent
	Cross-Complainant
<ol><li>TO THE CLERK: Consent to the above dismissal is hereby giver</li></ol>	ı. <sup>†</sup>
Date:	
(TYPE OR PRINT NAME OF ATTORNEY PARTY WITHOUT ATTORNEY)	(SIGNATURE)
+ If item 1a/3\ is charked all parties must sign	Attorney or party without attorney for:
If a cross-complaint—or Response—Marriage/Domestic Partnership (form FL-120)	☐ Plaintiff/Petitioner ☐ Defendant/Respondent
† If item 1a(3) is checked, all parties must sign. If a cross-complaint—or Response—Marriage/Domestic Partnership (form FL-120) seeking affirmative relief—is on file, the attorney for cross-complainant (respondent) must sign this consent if required by Code of Civil Procedure section 581(i) or (j).	<del>_</del>
	☐ Cross-Complainant
	tional signatures. Include date, printed name, and party information.
4. Dismissal entered as requested on (date):10/24/2025	
5. Dismissal entered on (date):	as to only (name):
6. Dismissal <b>not entered</b> as requested for the following reaso	ins (specify):
	• • • • • • • • • • • • • • • • • • • •
7. a. Attorney or party without attorney notified on (date):	
b. Attorney or party without attorney not notified. Filing	narty failed to provide
a copy to be conformed means to return of	- N 2 //
Date:10/24/2025 Cle	erk, by Deputy
	Page 1 of 2

PLAINTIFF/PETITIONER:

Jovenes de Antano

DEFENDANT/RESPONDENT:

Seniors Council, et al.

CASE NUMBER:

CU-25-00147

#### COURT'S RECOVERY OF WAIVED COURT FEES AND COSTS

If a party whose court fees and costs were initially waived has recovered or will recover \$10,000 or more in value by way of settlement, compromise, arbitration award, mediation settlement, or other means, the court has a statutory lien on that recovery. The court may refuse to dismiss the case until the lien is satisfied. (Gov. Code, § 68637.)

#### **Declaration Concerning Waived Court Fees**

Date:	140
I declare under penalty of perjury under the laws of the State of California	ornia that the information above is true and correct.
3. All court fees and costs that were waived in this action have bee	en paid to the court <i>(check one):</i> Yes No
<ul> <li>2. The person in item 1 is (check one below):</li> <li>a not recovering anything of value by this action.</li> <li>b recovering less than \$10,000 in value by this action.</li> <li>c recovering \$10,000 or more in value by this action. (If it</li> </ul>	tem 2c is checked, item 3 must be completed.)
1. The court waived fees and costs in this action for <i>(name):</i>	



# **Seniors Council of Santa Cruz and San Benito Counties**

# Agency Wide Budget vs. Actual July through September 2025

	Jul - Sep 25	YTD Budget	\$ Over Budget	Annual Budget
linary Income/Expense				
Income	05.000.00			511 32
PRIOR YEAR RELEASE FROM RESTRIC	25,000.00			۳,
CFL Manifeston	0.00	0.00	0.00	0.00
Monitoring	0.00	0.00	0.00	• 0.00
Total CFL	0.00	0.00	0.00	0.00
GRANTS REC'D (Income)	1,146,635.17	1,136,369.26	10,265.91	4,475,452.45
LOCAL MATCH RECEIVED-JURIS.	0.00	0.00	0.00	5 000 00
City of Capitola	0.00	0.00	0.00	5,000.00
City of Hollister	0.00	0.00	0.00	9,500.00
County of San Benito	0.00	0.00	0.00	33,665.26
County of Santa Cruz	44,625.00	38,687.56	5,937.44	154,750.00
Total LOCAL MATCH RECEIVED-JURIS.	44,625.00	38,687.56	5,937.44	202,915.26
LOCAL MATCH RECEIVED - OTHER				12
FOUNDATIONS				
Newman's Own Foundation	10,000.00			
Golden State Opp Foundation	0.00	10,000.00	-10,000.00	30,000.00
NANCY BUCK RANSOM FOUNDATION	0.00	0.00	0.00	10,000.00
SANTA CRUZ COMMUNITY CREDIT UNI	0.00	5,000.00	-5,000.00	5,000.00
COMMUNITY FOUNDATION - San Beni	12,700.00	13,750.00	-1,050.00	42,800.00
HARDEN FOUNDATION	0.00	25,000.00	-25,000.00	25,000.00
FOUNDATIONS - Other	0.00	82,018.86	-82,018.86	185,567.24
Total FOUNDATIONS	22,700.00	135,768.86	-113,068.86	298,367.24
MISC CASH DONATIONS	1,169.10	0.00	1,169.10	7,819.00
MISC VOL RECOGNITION	0.00	0.00	0.00	0.00
UNITED WAY				
Monterey County	0.00	ò.00	0.00	0.00
Santa Cruz County	0.00	5,000.00	-5,000.00	5,000.00
UNITED WAY - Other	0.00	0.00	0.00	0.00
Total UNITED WAY	0.00	5,000.00	-5,000.00	5,000.00
Total LOCAL MATCH RECEIVED - OTHER	23,869.10	140,768.86	-116,899.76	311,186.24
OTHER INCOME				
FGP / SCP 5310	0.00	0.00	0.00	0.00
Seniors Council Admin	2,814.00	17,217.00	-14,403.00	68,868.00
<b>REFUNDS &amp; DEPOSITS RETURNED</b>	0.00	0.00	0.00	0.00
MISC INCOME	1,325.17	0.00	1,325.17	5,000.00
OTHER INCOME - Other	0.00	0.00	0.00	0.00
Total OTHER INCOME	4,139.17	17,217.00	-13,077.83	73,868.00
SHARE OF COSTS RECEIVED	8,444.13	7,000.00	1,444.13	28,000.00
Total Income	1,252,712.57	1,340,042.68	-87,330.11	5,091,421.95
Gross Profit	1,252,712.57	1,340,042.68	-87,330.11	5,091,421.95.
Expense				
RECORDS SHREDDING	0.00	64.80	-64.80	175.00
INCONVENIENCE FEES	0.00	0.00	0.00	0.00.
PURCHASED FALLS PREVENTION SERV				
EQUIPMENT	0.00	0.00	0.00	0.00
PURCHASED FALLS PREVENTION SERV - Other	0.00	0.00	0.00	0.00
Total PURCHASED FALLS PREVENTION SERV	0.00	0.00	0.00	0.00
OFFICE FURNITURE	2,482.27	1,037.00	1,445.27	2,037.00

1:11 PM 11/10/25 Accrual Basis

# Seniors Council of Santa Cruz and San Benito Counties Agency Wide Budget vs. Actual

July through September 2025

	Jul - Sep 25	YTD Budget	\$ Over Budget	Annual Budget
WEBSITE	74.85	0.00	74.85	0.00
Bank Service Charges	0.00	0.00	0.00	0.00
MEETING EXPENSE	473.24	909.70	-436.46	2,500.03
ADMINISTRATIVE EXPENSE	2,814.00	19,542.00	-16,728.00	78,168.00
Reconciliation Discrepancies	0.20	0.00	0.20	0.00
RETURN OF GRANT FUNDS	0.00	0.00	0.00	0.00
ADVERTISING & PROMOTION	115.60	2,678.18	-2,562.58	7,822.00
BANK FEES	60.44	118.16	-57.72	480.00
CONTRACTED SERVICES				
SUB-CONTRACTOR	0.00	0.00	0.00	0.00
VENDORS	0.00	0.00	0.00	0.00
ADVERTISING	0.00	0.00	0.00	0.00
AUDIT	11,839.40	21,600.74	-9,761.34	28,650.92
CASUAL LABOR	220,00	0.00	220.00	1,150.00
CONSULTANTS	8,265.00	15,214.00	-6,949.00	40,050.00
SYNERGY	939.29	0.00	939.29	9,575.70
TRANSLATION	2,291.20	2,420.06	-128.86	11,600.00
Total CONTRACTED SERVICES	23,554.89	39,234.80	-15,679.91	91,026.62
CRIMINAL RECORDS CHECK	484.50	625.12	-140.62	2,500.00
DISASTER KIT	0.00	0.00	0.00	0.00
ELECTRONIC FILING	458.25	225.00	233.25	
EQUIPMENT	400.20	225.00	200.20	2,500.00
EQUIPMENT- EXPENDABLE	820,16	500.00	320.16	1,500.00
EQUIPMENT RENTAL	020.10	300.00	320.10	1,000.00
MEDICAL GUARDIAN				
Mini Guardian	0.00	0.00	0.00	0.00
MG Home	0.00	0.00	0.00	0.00
MG Classic	0.00	0.00	0.00	
MG Active	0.00	0.00	0.00	0.00
	-			0.00
Total MEDICAL GUARDIAN	0.00	0.00	0.00	0.00
EQUIPMENT RENTAL - Other	2,944.49	2,860.77	83.72	11,429.97
Total EQUIPMENT RENTAL	2,944.49	2,860.77	83.72	11,429.97
Total EQUIPMENT	3,764.65	3,360.77	403.88	12,929.97
FEES	105.00	0.00	105.00	0.00
INSURANCE	11,830.20	3,806.62	8,023.58	9,846.53
MAINTENANCE & REPAIRS	12,107.32	6,277.19	5,830.13	32,663.78
MEALS	0.00	0.00	0.00	0.00
MEMBERSHIPS	10,436.93	3,520.00	6,916.93	6,349.08
OFFICE SUPPLIES	8,628.28	6,979.56	1,648.72	27,648.89
PERSONNEL				
BENEFITS				
403b	14,376.65	14,734.48	-357.83	56,012.56
HEALTH INSURANCE	53,080.97	64,481.44	-11,400.47	231,657.66
WORKERS COMP INSURANCE	6,771.00	5,604.78	1,166.22	7,493.76
BENEFITS - Other	0.00	0.00	0.00	0.00
Total BENEFITS	74,228.62	84,820.70	-10,592.08	295,163.98
PAYROLL - WAGES				
Payroll Expenses	0.00	0.00	0.00	0.00
P/R TAX EXPENSE	22,667.54	23,311.02	-643.48	97,038.33

1:11 PM 11/10/25 Accrual Basis

# **Seniors Council of Santa Cruz and San Benito Counties** Agency Wide Budget vs. Actual July through September 2025

	Jul - Sep 25	YTD Budget	\$ Over Budget	Annual Budget	
PAYROLL - WAGES - Other	291,507.49	269,478.29	22,029.20	1,125,680.21	
Total PAYROLL - WAGES	314,175.03	292,789.31	21,385.72	1,222,718.54	
Total PERSONNEL	388,403.65	377,610.01	10,793.64	1,517,882.52	
POSTAGE	699.76	1,033.59	-333.83	3,813.12	
PRINTING & REPRODUCTION	2,031.90	4,358.36	-2,326.46	12,023.41	
SPACE COSTS					
DEPOSIT	0.00			-220.00	
JANITORIAL	1,480.00	984.56	495.44	4,497.66	
OFFICE RENT	25,806.36	20,411.70	5,394.66	84,190.70	
STORAGE RENT	689.97	725.78	-35.81	3,519.46	
TRAINING FACILITIES	0.00	400.00	-400.00	400.00	
UTILITIES	3,340.62	3,712.31	-371.69	12,814.74	
Total SPACE COSTS	31,316.95	26,234.35	5,082.60	105,202.56	
STAFF RECOGNITION	0.00	37.94	-37.94	1,200.00	
SUBSCRIPTIONS & PUBLICATIONS	0.00	0.00	0.00	0.00	
TELEPHONE	4,541.06	4,701.98	-160.92	18,852.82	
TOTAL GRANTS PAID (Expense)					
FARMERS' MARKET NUTRITION PROG	0.00	0.00	0.00	0.00	
GRANTS PAID (Expense)	612,377.00	620,672.70	-8,295.70	2,417,072.00	
GRANT RELATED INCOME (Expense)	66,983.00	40,827.68	26,155.32	163,313.00	
MATCH CASH	328,508.00	427,353.84	-98,845.84	1,709,415.00	
MATCH IN-KIND	0.00	0.00	0.00	0.00	
NON MATCH CASH	49,850.00	27,165.56	22,684.44	116,658.00	
NON MATCH IN-KIND	0.00	0.00	0.00	0.00	
LESS MATCH	-445,341.00	-497,346.56	52,005.56	-1,989,386.00	
TOTAL GRANTS PAID (Expense) - Other	0.00	0.00	0.00	0.00	
Total TOTAL GRANTS PAID (Expense)	612,377.00	618,673.22	-6,296.22	2,417,072.00	
TRAINING					
FEES	375.00	5,500.00	-5,125.00	7,000.00	
LODGING	502.64	0.00	502.64	0.00	
MEALS	344.00	0.00	344.00	0.00	
TRAINING - Other	0.00	0.00	0.00	0.00	
Total TRAINING	1,221.64	5,500.00	-4,278.36	7,000.00	
TRAVEL-STAFF					
TRAVEL-LOCAL	3,466.61	2,659.56	807.05	14,245.74	
TRAVEL-LONG DISTANCE	449.34	3,700.00	-3,250.66	3,700.00	
Total TRAVEL-STAFF	3,915.95	6,359.56	-2,443.61	17,945.74	
VOLUNTEERS					
RECRUITMENT	0.00	0.00	0.00	0.00	
OTHER VOL COSTS	0.00	0.00	0.00	0.00	
INSURANCE	1,738.13	1,390.00	348.13	1,390.00	
MEALS	13,419.62	16,921.31	-3,501.69	68,185.00	
PHYSICAL EXAMS	0.00	625.00	-625.00	850.00	
RECOGNITION	850.00	1,980.90	-1,130.90	8,350.00	
STIPENDS					
TEMPORARY ALLOWANCE	0.00	0.00	0.00	0.00	
COORDINATORS	0.00	250.03	-250.03	1,000.00	
TAX ASSISTORS	0.00	500.06	-500.06	4,400.00	
STIPENDS - Other	115,761.00	134,470.03	-18,709.03	537,880.00	

1:11 PM 11/10/25 Accrual Basis

# Seniors Council of Santa Cruz and San Benito Counties

# Agency Wide Budget vs. Actual

July through September 2025

	Jul - Sep 25	YTD Budget	\$ Over Budget	Annual Budget
Total STIPENDS	115,761.00	135,220.12	-19,459.12	543,280.00
RAINING	1,140.00	0.00	1,140.00	0.00
L	22,182.70	32,581.87	-10,399.17	130,327.00
	0.00	0.00	0.00	5,400.00
ERS	155,091.45	188,719.20	-33,627.75	757,782.00
	1,276,989.98	1,321,607.11	-44,617.13	5,135,421.07
	-24,277.41	18,435.57	-42,712.98	-43,999.12
	229.58	154.63	74.95	900.00
	229.58	154.63	74.95	900.00
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00
	229.58	154.63	74.95	900.00
	-24,047.83	18,590.20	-42,638.03	-43,099.12

Reserves as of 6/30/24

624,085

#### **AREA AGENCY ON AGING**

San Benito & Santa Cruz Counties



#### FOSTER GRANDPARENT/SENIOR COMPANION PROGRAM

Monterey, San Benito, Santa Clara & Santa Cruz Counties

# PROJECT SCOUT Tax Counseling Assistance

#### AGING & DISABILITY RESOURCE CONNECTION

Navigating the San Benito County Senior & Disability Services Network

Date: 12-4-25

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE:

#### **BACKGROUND**

Each year, the Seniors Council receives budget amendments (see attached) from the California Department of Aging, reflecting changes in our annual allocation and contract with the Department. Among these amendments is the notification of our annual One-Time Only Funds (OTO) Allocation. Use of One-Time Only funds is restricted as follows:

- 1) The purchase of equipment which enhances the delivery of services to the eligible service population;
- Home and community-based projects which assist caregivers to maintain care receivers in the home environment, as approved by the Department; and;
- 3) Innovative Pilot Projects, as approved by the Seniors Council and the California Department of Aging.

One-time only funds cannot be transferred between service categories (e.g., Title IIIE funds cannot be used for Title IIIC activities). One-time only funds must be spent in the current fiscal year.

As these funds have not be previously allocated to any of our direct services or our contracted service providers, Board action is required to distribute the funds.

Budget amendments must be submitted to CDA within 30 days of their receipt. Staff submitted the budget (pending any Board changes), and those allocations are brought here for your approval, or change. Broken down by category, they were as follows:

8-

Title IIIB Supportive Services - \$29,605. Allocated to Senior Network Services and our own ADRC, to be used to print updated senior resource guides in each county.

Title IIIB Ombudsman (\$196), TItle VIIA Ombudsman (\$518), and Title VIIA Elder Abuse Prevention (\$197), allocated to Senior Network Services for the operation of their Long Term Ombudsman in both counties.

Title IIIC1 Congregate Nutrition (\$12,910), and Title IIIC2 Home-delivered Meals (\$6,680), split on a 75/25 basis between Meals on Wheels of Santa Cruz County (\$14,692.50) and Martha's Kitchen (\$4,897.50 for the delivery senior nutrition program meals.

Title IIID Health Promotion & Disease Prevention (\$4,784) allocated to the Volunteer Center for the operation of Falls Prevention Classes in Santa Cruz and/or San Benito Counties.

Title IIIE Family Caregiver Support (\$15,636) allocated to Health Project Center and/or Gavilan College to offset the costs of Gavilan's new Caregiver Training Course, pending the approval of CDA. Failing to get CDA approval, the funds will be allocated to Health Projects Center for additional caregiver respite hours.

#### STAFF RECOMMENDATION

The Board of Directors should approve these recommendations, or direct staff to change the budgets submitted to the California Department of Aging according to their action.

State of California

California Department of Aging

#### AREA PLAN BUDGET DISPLAY

MOU#: AAA-2425-13 Release Date; Funding Revision #: Revision Date:

7/1/2024 2526-06 7/1/2025

Fiscal Year 2025-26 (Federal Fiscal Years 2025 & 2026) Seniors Council of Santa Cruz and San Benito Counties 12 months | July 1, 2025 - June 30, 2026

Program	Fund Type	Project Number	Baseline	Adjustments	Transfers	ото	Updated Total	Net Change
Surportive Services	Federal Title IIIB	3BSL	302 704	0	26 046	29 605	358 355	55 651
Ombudsman	Federal Title IIIB	3BOL	21,174	0	0	196	21,370	196
Ombudsman	Federal Title VIIa	70FL	37,247	0	0	518	37,765	518
Ombudsman	General Fund IIIB	B1GL	59,094	0	0	0	59,094	0
Ombudsman	General Fund IIIB - Augmentation	B1GL	29,739	0	0	0	29,739	0
Ombudsman	Public Health L & C Program Fund	LCPF	2,288	0	0	0	2,288	0
Ombudsman	State Health Facilities Citation Penalties Account	SDFL	7,964	21,838	0	0	29,802	0
Ombudsman	General Fund	SNFL	10.866	0	0	0	10.866	0
Ombudsman	Total Ombudsman		168,372	21,838	0	714	190,924	714
Congregate Nutrition	Federal Title IIIC1	3C1L	420,901	. 0	(26,046)	12,910	407,765	(13,136)
Congregate Nutrition	General Fund C1	C1GL	30,437	0	0	. 0	30,437	0
Congregate Nutrition	General Fund C1 - Augmentation	C1GL	79,663	Ō	0	Õ	79,663	0
Congregate Nutrition	NSIP C1	NC1L	0	29 292	0	Ŏ	29 292	Ō
Con regate Nutrition	Total Congregate Nutrition		531,001	29,292	(26,046)	12,910	547,157	(13,136)
Home-Delivered Meals	Federal Title IIIC2	3C2L	286,873	0	0	6.680	293,553	6,680
Home-Delivered Meals	General Fund C2	C2GL	60,933	o o	0	0,000	60,933	0
Home-Delivered Meals	General Fund C2 - Augmentation	C2GL	365,600	0	0	õ	365,600	0
Home-Delivered Meals	NSIP C2	NC2L	0	88 138	ō	õ	88 138	o o
Home-Delivered Meals	Total Home Delivered Meals		713,406	88,138	0	6,680	808,224	6,680
Disease Prevention	Federal Title IIID	3DFL	22,798	0	0	4,784	27,582	4,784
Family Caregiver	Federal Title IIIE	3EFL	147,240	Ď	Ō	15.636	162,876	15,636
Elder Abuse Prevention	Federal Title VII	7EFL	4.127	0	0	197	4.324	197
Administration	Administration	APAD	168,736	0	0	0	168,736	0
Administration- Information	Federal Title IIIB	APAD	45,523	Õ	ō	ō	45,523	o o
Administration-Information		APAD	60,668	0	o o	ŏ	60,668	Õ
Administration-Information		APAD	41,350	Ō	Õ	ŏ	41,350	ō
Administration-Information		APAD	21 195	0	Ö	ŏ	21.195	0
Administration	General Fund Baseline	APGA	100,000	0	0	0	100,000	0
Funding Summary	Total Federal Funds		1,411,800	117,430	0	70,526	1,599,756	70,526
Funding Summary	Total General Fund		736,332	0	0	0	736,332	0
Funding Summary	Total Public Health L & C Program Fund		2,288	0	0	0	2,288	0
Funding Summary	Total State Health Facilities Citation Penalties Account		7,964	21,838	0	0	29,802	0
All Funds	Grand Total - All Funds		2 158 384	139 268	0	70,526	2,368,178	70,526

Maximum amount available for	July-September (Fede	eral Funds Only)
	Program	Administration

Ti .	Program	Administration	TOTAL
Title IIIB	63,568	9,560	73,128
Title IIIB Ombudsman	4,447	0	4,447
Title III C1	105,225	15,167	120,392
Title III C2	63,112	9,097	72,209
NSIP C1	7,323	0	7,323
NSIP C2	22,035	0	22,035
Title IIID	5,472	0	5,472
Title IIIE	33,865	4,875	38,740
Title VII Ombudsman	8,567	0	8,567
Title VII Elder Abuse Preve	990	0	990

State General Fund available for transfer between C1 and C2 General Fund Maximum amount allowed to be transferred from General Fund C1 to General Fund C2 Maximum amount allowed to be transferred from General Fund C2 to General Fund C1

The maximum amount allowed to be expended for NSIP C1 through April 2026 is: The maximum amount allowed to be expended for NSIP C2 through April 2026 is: The minimum General Fund to be expended for State Match in Title III is:

81,053	
396,140	

23,800 71,612 59,440

CFDA NUMBER	Year	Award # Award Name	
93.041	2025	2501CAOAEA-00 Older American Act Title VII- Eider Abuse Prevention	
93.042	2025	2501CAOAOM-00 Older American Act Title VII- Ombudsman	
93.043	2025	2501CAOAPH-00 Older American Act Title III- Preventive Health	
93.044	2025	2501CAOASS-00 Older American Act Title III- Supportive Services	
93.045	2025	2501CAOACM-00 Older American Act Title III- Congregate Meals	
93.045	2025	2501CAOAHD-00 Older American Act Title III- Home-Delivered Meals	
93.052	2025	2501CAOAFC-00 Older American Act Title III- Family Caregivers	
93.053	2025	2501CAOANS-00 Older American Act Nutrition Services Incentive Program	

State Funds must be expended by 6/30/26 and final expenditures reported in closeout by 7/31/26.

Federal Funds must be reported in closeout by 7/31/26. Once closeouts are processed, CDA will determine the amount that can be carried over into next year's Funding Revision. Requests for transfers must be submitted via the Area Plan budget form. Final transfers are due to CDA by 1/15/26.

The minimum General Fund State Match does not take into account other program income that may increase that amount of minimum match required.

The expenditure period for the GF Augmentation funding has been extended to June 30, 2027. CDA will issue remaining allocations following the AP-2526 closeout.

For my end-of-year report, I would like to remind you or show you for the first time what the AmeriCorps Seniors Foster Grandparent and Senior Companion Program has gone through in FY25. Here is a timeline.

#### January

8<sup>th</sup>, AmeriCorps Seniors' Foster Grandparent Program, Senior Companion Program, grant continuation or renewal started. Applications are due no later than Monday, March 10<sup>th</sup>.

20<sup>th</sup>, Jennifer Bastress Tahmasebi as AmeriCorps' interim agency head with full support from the incoming administration's transition team.

On Monday, Jan. 27, the Office of Management and Budget issued Memorandum M-25-13, Temporary Pause of Agency Grant, Loan, and Other Financial Assistance Programs. This Memorandum referenced several executive orders and related directives issued by the President over the past week and a half. On Tuesday, Jan. 28, a federal district court judge in Washington, DC issued an administrative stay halting the directives contained in the Memorandum until Monday, Feb. 3. Then, today, Wednesday, Jan. 29, the Office of Management and Budget rescinded Memorandum M-25-13.

#### **February**

3<sup>rd</sup>, Per White House directive, AmeriCorps is taking steps to comply with President Trump's executive orders, including executive orders "Ending Radical and Wasteful Government DEI Programs and Preferencing" and "Defending Women from Gender Ideology Extremism and Restoring Biological Truth to the Federal Government.

11<sup>th</sup>, AmeriCorps continues to review all applicable executive orders, memoranda, and corresponding guidance issued since January 20, 2025, by President Trump, the Office of Management and Budget, and the Office of Personnel Management. AmeriCorps is taking proactive action to ensure alignment with these directives and the Trump-Vance Administration priorities.

20<sup>th</sup>, Per White House directive, AmeriCorps is taking steps to comply with President Trump's executive orders. View our recent messages regarding compliance with the executive order.

27<sup>th</sup>, State and National Terms and Conditions, and the Certifications and Assurances have been revised pursuant to Executive Order/Executive Memoranda.

#### May

AmeriCorps Seniors 2025 Convening was canceled. This canceled the annual meeting in Washington, where we, the Director and Fiscal Officer, received direct training from AmeriCorps Seniors.

#### June

9th, the Seniors Council Senior Companion Program received the renewal Notice of Grant Award from the Corporation for National and Community Service (AmeriCorps)

# 11th, the Seniors Council Foster Grandparent Program received the renewal Notice of Grant Award from the Corporation for National and Community Service (AmeriCorps)

The White House released an FY26 budget that proposes shutting down the AmeriCorps agency, and now OMB is withholding a portion of AmeriCorps' FY25 funding, which a bipartisan majority of Congress approved. President Trump signed into law just three months ago.

AmeriCorps pulled down all standing meetings with the field so that agency staff can focus all resources on executing the agency's core business. The AmeriCorps Modernization Office will no longer hold standing meetings with the grantees and sponsors. All currently scheduled quarterly meetings are cancelled. Agency staff are prioritizing operations, awards, and member management to ensure we can continue serving their communities.

#### July

At the direction of DOGE, the AmeriCorps agency dismissed nearly 85% of its staff, issued stopwork orders to 750 AmeriCorps NCCC and FEMA Corps members, and terminated over 1,000 grants, dismantling programs midstream and prematurely ending the service of another 32,000 AmeriCorps members and AmeriCorps senior volunteers.

#### August 28, 2025

The Senate Appropriations Committee drafted a spending bill that sustains investments in AmeriCorps for another year. And last week, the Office of Management and Budget released \$200 million in fiscal year 2025 funding that it had been withholding.

#### September

AmeriCorps Foster Grandparent Program celebrated its 60th anniversary

2<sup>nd</sup>, the House Labor, Health and Human Services Appropriations Subcommittee advanced a fiscal year 2026 bill that proposes to *slash AmeriCorps funding by more than 50 percent*— eliminating tens of thousands of service positions and stripping communities of critical support in education, disaster response, public health, and more. Read our full statement on the House mark here: <a href="https://voicesforservice.org/news/press-release/house-appropriations-bill-would-gut-americorps-blocking-thousands-from-serving-communities/?emci=6b7aa8a7-e988-f011-b484-6045bdeb7413&emdi=7a289c4f-0989-f011-b484-6045bdeb7413&ceid=13319129</a>

If enacted, this bill would devastate AmeriCorps: halving programs like AmeriCorps State and National, VISTA, NCCC, and AmeriCorps Seniors Foster Grandparent and Senior Companion programs, and cutting the National Service Trust — which provides education awards to AmeriCorps members — by more than 75 percent. Communities that depend on AmeriCorps

members and AmeriCorps Seniors volunteers to tutor students, rebuild after disasters, and support veterans and seniors would be left without this vital people power.

But this bleak House proposal stands in stark contrast to recent positive developments. In August, the Senate Appropriations Committee drafted a spending bill that sustains investments in AmeriCorps for another year. Read our full statement on the OMB release <a href="https://voicesforservice.org/news/press-release/omb-to-release-fiscal-year-2025-americorps-funds/?emci=6b7aa8a7-e988-f011-b484-6045bdeb7413&emdi=7a289c4f-0989-f011-b484-6045bdeb7413&ceid=13319129</a>

On top of that, we also took a big hit when we lost our partnership with the Santa Clara Heart Start Program in March, following mass layoffs. Then, in September, we lost the Encompass partnership when they decided not to continue providing the Head Start Program after the government shutdown resumed.

Knowing the Santa Clara Head Start program was going to end, program coordinator Lydia Ramirez secured a new MOU with Santa Clara Unified School District—Family Child Education Services—Preschool & Extended Learning, where she found placements for those who had lost theirs.

Currently, our partnership with the Pajaro Valley Unified School District will allow program coordinator Monica Alvarez to place volunteers who lost their placements with Encompass in Preschool classrooms.

Despite these new hurdles, we remain positive and ask our volunteers and communities to continue advocating for Foster Grandparent and Senior Companion Programs, as funding for FY26 remains uncertain.

Thank you, Cristina Bañuelos Program Director



# ADRC of San Benito County Status Report – December 2025 Year in Review

The ADRC of San Benito County is finishing up a very successful year of long term services and supports delivery to older adults, as well as community leadership and involvement in the growth and development of targeted services to help older adults, individuals living with disability, and caregivers find the person-centered counseling, navigation assistance, and enrollment supports needed to remain in their respective homes and communities for as long as is practical and safe. It has been a year marked by growth, changes, and new responsibilities for ADRC direct services and management staff, much of which is still in process, and much of which is beginning to deliver real improvements and results.

After having moved the ADRC Office to the Community Foundation for San Benito County's Epicenter in 2024, the ADRC Office moved back to the Pauline Valdivia Memorial Community Center in July of 2025. Owing to some ADRC partner friction with Jovenes de Antano, the move away from the Community Center was envisioned as a way to help reset the collaborative relationship and provide some distance between the two organizations in order to better understand program needs and in order to sort out service roles and expectations. The move back to the Pauline Valdivia Memorial Community Center came about after the formalized end of the ADRC's core services partnership with Jovenes de Antano, and the City's and Parks and Recreation's reorganization of the management of the building, along with the associated changes to tenant contracts and the allocation of office and activity spaces there. Both the new congregate meals service provider, Martha's Kitchen, as well as the Parks and Recreation Department, also activity sought the ADRC's participation as a tenant and service provider at the location, and so plans were made and realized in July of 2025 occupy a new and expanded office space there at the Community Center.

The move back has been a tremendous success, and also coincided with some additional program staffing and responsibilities changes. The ADRC was able to hire a new Program Coordinator, Crystal Ortiz, in early September of 2025, in order to be able to respond to the increasing services and staffing demands at the new-old location, and in order to provide on-going support and back-up for Leanne Oliveira, the program's sole remaining Program Coordinator after the dissolution of the partner relationship with Jovenes de Antano. With two Program Coordinators employed and supervised by Seniors Council, and with Crystal's background in Public Health and Health Education, the ADRC has grown to begin serving more individuals with a wider array of supportive services and with an enhanced level of expertise. Additionally, and with Crystal's bi-lingual Spanish skills, the ADRC is also now better positioned than ever to provided additional awareness building and targeted outreach regarding program services to underserved monolingual Spanish-speaking populations.

However, in keeping with the old adage about "to whom much is given, much is expected," the ADRC with new staffing and skills has also been give n a new charge and new responsibilities. For the FY 25/26 service year, the ADRC is the new Older Americans Act Title IIIB Information & Assistance and Case Management services provider for San Benito County. While this additional work is actually an extension of core services work for which the ADRC was already responsible and already actively delivering, the new Title IIIB provider designation has allowed the ADRC to expand available services

through the use of this modest increase in funding from the Area Agency on Aging and the California Department of Aging. We are excited about the opportunities such funding and the additional charge bring with them. Moreover, as these funds are not specifically earmarked for individuals based on designated degree of disability or on a specified income level, they further enable the ADRC to be able to work with consumers and caregivers who otherwise would be unable to access such supports unless they opted to pay privately for the additional layer of assistance. This is very important, since navigating and securing needed community supports can still be challenging and even overwhelming for people without MediCal eligibility or enrollment, and the ADRC also can continue to support these MediCal eligible individuals, as well!

Also, during 2025, the ADRC was able to build and expand partnerships with a bevy of new Enhanced Care Management providers, Martha's Kitchen, San Benito County Behavioral Health, the Community Foundation for San Benito County, and with the San Benito Connect Volunteer Services Development Program. These new and expended relationships have allowed the ADRC to reach more individuals of differing backgrounds and needs find the community-based long term services and supports they might need to live safely, successfully, and to participate more fully in their neighborhoods and communities of choice in San Benito County. Inclusive and diverse communities make for stronger individuals and families and more resiliency for all, and the ADRC is proud and pleased to be a champion of such an inclusive, positive, and strengths-based approach to addressing both individual and community needs. Finally, the connection and the collaborative work being done between the ADRC and San Benito Connect benefits both programs, as volunteers are at the core of community-based services provision, while at the same time, volunteerism represents an incredible opportunity for older adults and those living with disability to engage and serve others in need, thus increasing their own feelings of self-worth and self-determination.

Lastly, the closing of 2025 also provides an opportunity for the ADRC to acknowledge the partnerships and participation of dozens of local individuals, organizations, and institutions without whose assistance and community leadership the ADRC could not survive nor prosper. The ADRC "No Wrong Door"

Network is not the office at the Pauline Valdivia Memorial Community Center, and it is not the staff that do that important work at that location. Instead, the ADRC No Wrong Door Network is first and foremost - - as the name says - - a network of dedicated organizations, other paid staff, volunteers, community leaders, civic and spiritual organizations, County-led services and programs, as well as those of you for whom this report has been prepared, working individually and together to make Hollister and San Benito County more livable for those who make and call the area home. Your support and goodwill help your families, neighbors, and friends - - and even a few people you wouldn't want to count as friends! - - while also making yourselves more loving, compassionate, and more fully human. You all rock, and we are so very lucky to be able to rock with you!



# Monthly Report to the Board of Directors – Community Foundation for San Benito County

Submitted by: Corey Shaffer, Community Coordinator

Senior Services Planning and Volunteer Engagement

San Benito County, Seniors Council

For the Month of November 2025

#### **Program Highlights**

#### Communications & Outreach

- Completed updates to the December San Benito Seniors Connect Newsletter, featuring new resources, holiday messaging, volunteer opportunities, and community partner updates. (Attached.)
- Expanded and maintained contact lists for newsletter distribution and seniorfocused communication.
- Created social media posts supporting Giving Tuesday, volunteer recruitment, and ongoing senior programs.
- Updated and refined content on SBCVolunteers.org, including volunteer opportunities, training information, and community partner resources.
- Coordinated a December advertising placement with FastResponseAdvertising.com, featuring a triple-size promotional ad to increase community visibility for volunteer engagement and senior support services. (Ad attached.)
- Coordinated with Mission Village Voice on a full-page volunteer Q&A featuring Rochelle Worsham, along with a companion promotional ad promoting SBCVolunteers.org and senior support programs. (Q&A and ad attached.)
- Coordinated with BenitoLink regarding a potential December promotional ad to highlight volunteer opportunities and senior support services; awaiting confirmation from the editor.
- Installed a large San Benito Connect volunteer + donation banner on Airline Highway near Mansmith's BBQ location, increasing community visibility for both volunteer recruitment and donations. (Photos attached.)

#### Volunteer Engagement

- Developed volunteer-focused outreach materials, including spotlight features, recruitment messaging, and social media campaigns.
- Added new volunteers to SBCVolunteers.org and maintained updated contact lists to support partner organizations.
- Continued collaboration with community partners, including Mission Village Voice, to highlight volunteer opportunities and share engagement updates.

#### **Meetings & Community Collaboration**

- Attended community and internal meetings, including Aging & Disability Services, National Philanthropy Day wrap-up, Senior Tech Help at the SBC Library, leadership/marketing discussions, ALTCC, and Program Directors meetings.
- Attended the National Philanthropy Day Dinner on November 9, a valuable opportunity to connect with local nonprofits and identify organizations in need of volunteer support.
- Volunteered at the Veterans Day Parade on November 11 in downtown Hollister, supporting community engagement and building visibility for senior programs.
- Volunteered at the Lights On Celebration Parade on November 29, supporting community engagement during one of Hollister's largest annual community events.
- Continued partnership outreach to support visibility for volunteer roles, senior programs, and community engagement efforts.
- A meeting is scheduled for December 9 at 9:30 AM with Cassandra Kartashov, Chief Executive Officer, to provide an overview of volunteer engagement activities, the Master Plan for Aging Local Playbook, and ongoing workgroup efforts.

#### Master Plan for Aging (MPA)

- Continued development of agenda materials and content for the upcoming January 2026 combined MPA workgroup meeting.
- Continued coordination across all MPA focus areas to support short-term projects and workgroup planning.

#### **Looking Ahead**

- Finalizing preparations for the January MPA combined workgroup meeting.
- Continuing updates to SBCVolunteers.org to expand volunteer engagement and community participation.
- Preparing January outreach and newsletter content, and developing 2026 communication priorities.
- Meeting with CEO Cassandra Kartashov on December 9 to review volunteer engagement goals, the MPA Playbook, and ongoing workgroup progress.

#### Summary

November was a productive month with strong communication efforts, expanded community outreach, and continued development of volunteer engagement initiatives. Media partnerships, advertising placements, and the installation of the new visibility banner helped raise awareness for SBCVolunteers.org and senior support services. Preparations for the January MPA combined meeting remain on track, and the upcoming meeting with CEO Cassandra Kartashov will support alignment heading into 2026.



# Hello!



Eduardo Santana
Program Director
Project SCOUT
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seniorscouncil.org https://seniorscouncil.o rg/project-scout/ This is Project SCOUT's Program
Director. Here I will present Project
SCOUT's performance report for
2025 and vision for 2026.

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## **End of Year 2025 Report**

Volunteers are the foundation of Project SCOUT's services, and we work hard to strengthen volunteer relationships. The end of the year is the time when Project SCOUT reconnects with returning volunteers and creates foundations with new ones, as the goal is that each and every one of them participate in the upcoming tax season, and beyond. Project SCOUT is a year-long program, assisting with both free tax preparation and tax related assistance as well as Calfresh for those that qualify, by our dedicated volunteers and staff.

By November, returning and possible volunteers have been contacted and placed in our certification list to start training in mid - December. Possible volunteers have been screened and asked to commit to days, hours, and regions in Santa Cruz and San Benito Counties for the duration of tax season. As well, continuing site partners are being contacted so as to plan days and hours of services for the upcoming tax season.

In 2025, Project SCOUT has spent lots of staff hours assessing and assisting seniors and those with a disability that came to us for taxes who qualify for CalFresh. The steps that Project SCOUT has employed to outreach, assess, and sign-up those in need has been such a success that CDA asked us to share our methodology with other organizations in California.

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## (Continued)

Project SCOUT, just like all of the Seniors Council of Santa Cruz and San Benito Counties, moved offices in the middle of tax season causing a major disturbance to services. Project SCOUT as a result has consolidated direct services for both taxes and Calfresh out of its Watsonville Senior Center office.

Of all the wrenches that 2025 has bestowed us, the biggest barrier to services has been the Zeal from the Federal Government to defund, disable, dismantle, and disenfranchise. From funding cuts, to the possibility of outright termination of programs and services, to at-this-time happening persecution of taxpayers we serve and have had a legal obligation to protect following the IRS's own "Bill of (Taxpayer's) Rights" which the IRS itself has broken away from. Recently, a Federal judge stopped the IRS from sharing taxpayer information with DHS (currently in the courts), but a breach has already been made, and the zeitgeist of our current administration makes it likely to continue even with a Federal Court injunction.

Just recently, CalFresh (SNAP) recipients, some of whom we've served, had to scramble and find other means of putting food on their tables due to the Government shutdown. Now services just reestablished, the Federal Government is threatening to withhold SNAP from states like California who wish not to share information of clients, information which would be used to the detriment of already marginalized individuals.

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### 2025 Tax Service Sites:

- 1. Project SCOUT Facilitated Self Assistance ALL Online: http://tinyurl.com/SCOUTFSA (all year)
- 2. Project SCOUT TCE ALL (Remote/in-home and ad-hoc for at-risk seniors and disabled) (all year)
- 3. Highlands Park Community/Senior Center Ben Lomond (Wed and Thurs 10:00-1:00)
- 4. Felton Public Library (Sat 10am to 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. Watsonville Senior Center (Wed 10:00-1:00)
- 14. Pauline Valdivia Memorial Center (Wed 1pm-4pm, 5:30-7:30)
- 15. Project SCOUT VITA Ad-Hoc Events: One off services such as Tacos and Taxes in Hollister, and the E-Bus at the San Juan Bautista Library (all year)

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# **2025 Tax Preparation Totals**

Estimate\* (With the IRS's loss of at least 25% of their workforce, including 3 SPEC agents in 2025, it was left up to Project SCOUT to "guesstimate" our recent totals).

Returns Completed (E-file + Paper + Past year returns)	TOTAL	
Federal Returns	1973	
Dollar Amount Federal Refunds	1,464,532.00	
Dollar Amount State Refunds	349,286.00	
Dollar Amount of EITC Claimed	465,815.00	
Calculated Amount of TOTAL refunds	1,813,818.00	
Total money back in the wallets of our clients, including average return cost of \$240.00* - \$2,287,338.00!!	2,287,338.00	

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\$2,287,338.00

Total dollar amount put back in clients wallets including the savings for average cost of tax return (\$240.00\*).

\*Based on the '2024 Income and Fees of Accountants and Tax Preparers in Public Practice Survey Report' Form 1040 (Itemized Sch A & State) Minimum Fee estimating a program like Project SCOUT saves \$200-\$325 for every return prepared.

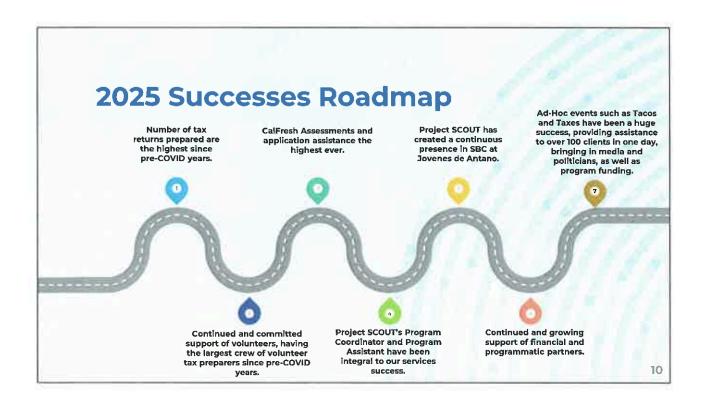
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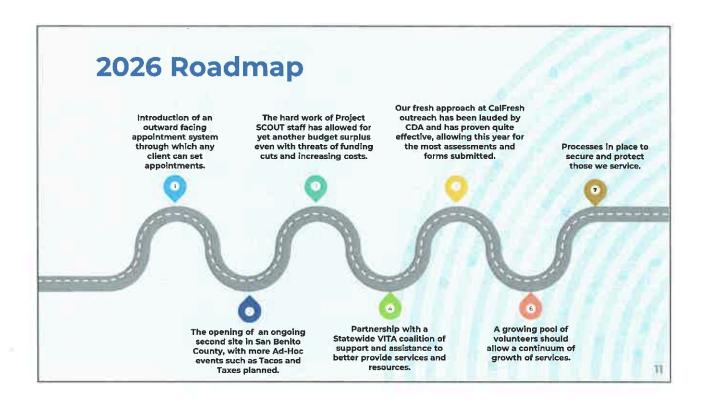
## 2025 Calfresh Totals

Assistance Completed (assessments and application preparation)	TOTAL
Number of senior and disabled clients assessed/qualified for services SCC	1623
Number of senior and disabled clients assessed/qualified for services SBC	139
Number of senior and disabled clients assisted with Calfresh applications SCC	94
Number of senior and disabled clients assisted with Calfresh applications SBC	n
Total number of senior and disabled clients assessed for services	1762
Total number of senior and disabled assisted with Calfresh	105

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# Before I go...



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Project SCOUT's current focus is to connect with a possible 123 volunteers in Santa Cruz and San Benito counties for tax assistance and Calfresh past tax season. Just two weeks ago we "reconnected" with the IRS, have been assigned an agent, and are back on track for 2026 services. Materials for trainings, and trainings themselves are not ready yet, but with the help of our statewide coalition, we will start trainings regardless, with the goal of starting services on February 1st, 2026.

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# Thanks!

Looking forward to 2026, thanks for your support.





# STATE OF CALIFORNIA CALIFORNIA SENIOR LEGISLATURE

1020 N Street, Room 527, Sacramento, CA 95814 Phone (916) 767-4382

www 4csl.org

# FOR IMMEDIATE RELEASE October 24, 2025

#### The California Senior Legislature Announces Top Legislative Priorities for 2026

(Sacramento, CA) The California Senior Legislature (CSL) adjourned its 45th Annual Legislative Session and announced the Top State Legislative Proposals this week. Members will advocate diligently during the 2026 legislative session to have state lawmakers support these priorities. Each priority has the Governor's Master Plan for Aging (MPA) goal referenced.

#### The following were listed as the top ten State Legislative proposals:

#### SP-1: Medi-Cal Personal Needs

(Senior Senator Helen Lopez, El Centro, CA) MPA Goal # 2

This measure would increase the personal needs allowance from \$35 to \$50 per month and require that the amount be increased annually up to the amount of any cost-of-living adjustment implemented by the United States Social Security Administration.

#### AP-1: Caregiving Grandparents: Handbook

(Senior Assembly Member Mark Cox, El Centro, CA) MPA Goal #5

This measure requests that the California Department of Aging and State Department of Social Services provide a bilingual handbook, modeled after the county of San Diego Handbook for grandparents raising grandchildren and other relative caregivers, that provides relative information and resources on the caregiving of dependent children for Child Welfare Agencies, County Area Agencies on Aging and caregiving grandparents.

#### SP-2: Older Adult Education: Local Public Health Departments

(Senior Senator Steve Lipson, El Cerrito, CA) MPA Goal #3

This measure authorizes local Public Health Departments to establish older adult education programs that include, among other things, communal meals and instruction in digital literacy and access to technology, fall prevention and physical activity.

#### AP-8: Seniors: Fall Prevention: Lighting

(Senior Assembly Member Richard White, Vacaville, CA) MPA Goal # 2

This measure (1) requires the adoption, design, development, and implementation of a comprehensive program to support and fund the installation of improved lighting in the



homes of eligible older adults, and requires the inclusion of funding for specific lighting products that will improve visibility.

#### AP-2: Personal Income Tax: Senior Child Care Tax Credit

(Senior Assembly Member Mark Cox, Yucaipa, CA) MPA Goal # 5

This measure establishes an income tax credit for qualifying seniors of \$2,500 for each claimed dependent under 18 years of age.

#### AP-9: Area Agencies on Aging: Electronic Device Tracking

(Senior Assembly Member Richard White, Vacaville, CA) MPA Goal #3

This measure requires the Department of General Services and the Department of Technology to revise the State Administrative Manual to designate electronic devices purchased by certain local agencies as non-sensitive and non-high risk and to exempt Area Agencies on Aging from annual inventory tracking requirements.

#### AP-5: Senior Welfare

(Senior Assembly Member Rob Holt, Chico, CA) MPA Goal #5

This measure would create a Senior EBT Card exempting eligible seniors from state and local sales and use taxes on all purchases.

#### AP-3: Master Plan for Aging: Caregiving: Grandparents

(Senior Assembly Member Mark Cox, Yucaipa, CA) MPA Goal #4

This measure would require the California Department of Aging, California Health and Human Services Agency, Department of Justice, and State Department of Social Services to add an initiative to the Master Plan for Aging to address the issues and expenses associated with being a caregiving grandparent.

#### AP-4: Automatic External Defibrillators

(Senior Assembly Member Milissa Meyer, Indian Wells, CA) MPA Goal #2

This measure requires a senior center or community center providing activities to 50 or more people who are 55 years of age or older, to obtain and maintain an Automatic External Defibrillator.

#### AP-7: Food Labeling Country of Origin

(Senior Assembly Member Helen McBrady, El Cajon, CA) MPA Goal #2

This measure mandates the clear and conspicuous disclosure of the country of origin on the principal display panel of all imported or domestically packaged food products to promote transparency, traceability and consumer safety.

-END-

#### CONTACT:

For additional information contact Janice Bailey, Executive Director, at (916) 767-4382 or ibailey@seniorleg.ca.gov.



# **Age-Friendly Insights:**

Americans Support Tax Dollars Being Spent on Community Programs for Older Adults



First passed by Congress in 1965, the Older Americans Act (OAA) provides services like meal delivery, transportation, caregiver support and more to older adults across the United States by issuing grants funded by federal tax dollars to states and local social service organizations. One of its main goals is to help older adults age at home for as long as possible and delay expensive nursing home care.

One in six older adults relies on services supported through the OAA, which requires congressional authorization every four years and is overdue for reauthorization. It has traditionally received strong bipartisan support.

The John A. Hartford Foundation (JAHF) commissioned a survey of more than 1,100 U.S. adults age 18+ to understand their views on supporting community programs for older adults and the OAA. Findings include:

State and local social service programs that help older adults with daily living enjoy strong support across the United States.

#### Programs funded by the OAA are supported by more than four in five U.S. adults.

- 87% support meals offered to groups in places like senior centers and churches.
- 85% support meals delivered at home, like Meals on Wheels.
- 85% support transportation to medical appointments and other places in the community, like grocery stores.
- 83% support helping family caregivers who need time to take care of their own health needs.

**Older Americans** Act services are essential to healththe kind of programs that keep grandparents across America healthy. safe and engaged in their communities. For 60 years, the OAA has funded communitybased organizations that deliver meals to people's homes, serve food in community centers and church basements, provide transportation to medical appointments. give support to family caregivers and more. The public strongly supports the OAA and its reauthorization."

Rani E. Snyder, MPA
Acting President, JAHF



iohnahartford.org



- Support for these programs is high regardless of age, race/ethnicity or where people live.
  - Support increases with survey respondents' age, but they're popular (more than 70% support) across all age
    groups.
  - Support remains consistently high (above 80% support) regardless of where respondents live in America.
  - Support was high and virtually the same across race and ethnicity.

People overwhelmingly believe the Older Americans Act should continue to be funded by the U.S. government.

- Fully 84% of adults in America support continued funding of the OAA.
- Support is high across all political party affiliations.
  - 80% of Republicans support funding the OAA.
  - 81% of Independents support funding the OAA.
  - 94% of Democrats support funding the OAA.

People support using federal tax dollars on programs that help older adults age in their home, rather than in nursing homes.

Nearly four in five adults (79%) support using federal tax revenue to fund programs that help people age at home, in their community.

Recognizing the physical and mental health benefits of older adults remaining active and engaged in their communities, adults support federal funding for related local programs.

- Nearly seven in 10 adults (69%) support using federal taxes for programs that help keep older adults active and engaged.
  - Women support funding these state or community-based programs more than men (74% vs. 64%).

Using tax revenue to help prevent elder abuse, neglect and exploitation is supported by four in five adults.

- Older people and women are more supportive of using federal taxes to fund these kinds of programs, compared to younger people and men.
  - Support ranges from 66% for those 18-29 to 88% among those 60+, but is a sizeable majority across all ages.

11-2-2