



**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 February 18, 2026**

**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/j/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. Approve minutes of the January 2026 Advisory Council Meeting
- 10:15      6. Committee Reports
- A. Advocacy Committee
- B. California Senior Legislature

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

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

- 11:05 7. Executive Director's Report
- A. Agency Operations
  - B. SB 1249 & CDA's 2030 Plan
  - C. Master Plan for Aging Local Playbooks
  - D. Amendment to our 403b Plan (**Board Resolution**)
  - E. Service Provider Progress Report & CSL Elections
- 11:20 8. Program Reports (written)
- A. Foster Grandparent/Senior Companion Program
  - B. Aging & Disability Resource Connection (ADRC)
  - C. Volunteer Coordination Project
  - D. Project SCOUT
  - E. AAA Updates
- 11:40 9. Miscellaneous Correspondence & Other Items
- 12 Noon 10. Adjourn

**Next Meeting:**  
*March 18, 2026*  
*10 am to 12 noon*  
175 Westridge Dr., Watsonville, CA 95076

### **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)

**January 14, 2026**

**MINUTES**

**ADVISORY COUNCIL MEMBERS PRESENT:**

Steve Clark (City of Scotts Valley)  
Tara Ireland (Empowered Aging; AAA Service Provider)  
Mindy Sotelo (San Benito County Board of Supervisors)  
Mark Johannessen (At-large, Seniors Commission)  
Stephanie Auld (Representative of Persons with Disabilities)

**ALTERNATES PRESENT:**

Sandy Brown (alternate J. Cummings)

**ADVISORY COUNCIL MEMBERS EXCUSED:**

Kimberly De Serpa (Santa Cruz County Board of Supervisors)  
Gerry Jensen (City of Capitola)  
Gabriela Trigueiro (City of Santa Cruz)  
Ari Parker (City of Watsonville)  
Angela Curro (San Benito County Board of Supervisors)  
Justin Cummings (Santa Cruz County Board of Supervisors)  
Dolores Morales (Councilmember, City of Hollister)  
Scott Freels (City of San Juan Bautista)

**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, Volunteer Coordinator

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

Acting chair Steve Clark called the meeting to order at 10:07AM. Introductions were skipped.

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

Clay would like to discuss the December joint meeting; added to ED report.

**3. Receive Announcements from Advisory Council Members**

None.

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

None.

5-1

## 5. Consent Agenda

Advisory Council members were referred to Pages 5.1-1 to 5.2-5, minutes of the September and December AAA Advisory Council meeting.

**MOTION, BROWN/IRELAND**, to approve the minutes of the September and December, 2025 AAA Advisory Council meeting. **PASSED**, Mark abstains.

## 6. Advocacy Committee

1. Master Plan on Aging Local Playbook – Clay recapped basics of Advocacy Committee meeting. Need to get in front of City-level bodies and officials. Have already made several presentations, especially in SBC. Will present at Seniors Commission next month, others (Community Foundations, City Councils, etc.) TBD.  
Mindy suggested using May (Older Americans Month) as a coordinating focus. Broad agreement that the extra attention will be beneficial. Group will coordinate on scheduling to avoid overlapping presentations. Scotts Valley May 6 6 PM. SBC on May 12.  
Santa Cruz MPA Governance Body report, details on staff from County. Finally meeting regularly again after a long pause. All Cities now represented although now with no elected officials; still trying to find its way as a group. Mark asked what influence they will have without electeds' involvement. Clay said MPA effort is not government-led; although their participation is appreciated, other agencies making progress.
2. SB 1249 & CDA's Aging 2030 Plan – tracking implementation of 1249 as it develops.
3. Elected Meetings and Talking Points – discussed throughout. Persistent need for additional outreach.

## 7. Executive Director Report

1. Agency Operations – Clay pointed to 7.5, which shows a single unspent dollar from ARPA funding; they've already sent an invoice for it.
2. SB 1249 & CDA's 2030 Plan – Continues to move forward on re/de-designation of AAAs. Now planning to re-draw map of PSAs as first step in process, County obligation to create. PSA must have at least 100,000 residents to be approved.  
Santa Barbara currently facing de-designation over poor performance, public hearing in Feb.  
Ventura AAA: run by County but they are pulling out over costs.  
Revision of Intrastate Funding Formula (IFF) pending. Newest model benefits rural communities (including our PSA) at cost of urban PSAs. Almost certainly will face legal challenges before being finalized.  
IFF spreadsheet shows ~\$14 million per year, but also unspent funds of ~\$19 million per year. Those funds could be used to cover proposed changes to formula. Steve asked about timeline for finalization of IFF; unclear at this point.  
Discussion about approaching Supervisors from other neighboring Counties about possibility of merging SBC into their PSA, while also pressuring SCC Supervisors to reject dividing current PSA. Advocacy Committee also working on this effort.  
"Core Services" as part of CDA 2030 plan, to provide more detailed and transparent reporting on: Nutrition, Family Caregiving, and Information & Assistance.  
C4A promoting need for study of minimal costs/staff requirements to run a AAA, which has never been done before.
3. Master Plan for Aging Local Playbooks – covered previously.

## 8. Program Reports (written)

1. Foster Grandparent/Senior Companion Program – AmeriCorps funding still in limbo pending budget action.  
Also uncertain about what happens on Jan. 30. If no budget is passed, some funding will be shutdown. Impacts service providers most directly (family caregivers, I&A, internal operations, legal services, etc.)

2. *Aging & Disability Resource Connection (ADRC)*
3. *Volunteer Coordination Project*
4. *Project SCOUT*
5. Non-Seniors Council Programs – Looming shutdown and cuts pose huge threat to service providers. Second Harvest no longer able to provide food to Grey Bears. Both Counties have waiting lists for home-delivered meals already. Contracted providers threatened by reduced match dollars, leading to waiting lists and cut corners.
6. Disability Issues – Stephanie recounted her negative experiences at joint annual meeting, and highlighted need for focus on needs of disabled people going forwards. Raised concern that disability issues are not represented by Seniors Council, despite recognition from CDA. Independent Living Center Network, locally represented by CCCIL, designated body for addressing disability needs; were involved during MPA creation. Group discussed disconnect between related but separate social issues. Question of whether scope is limited by regulations of CDA/Older Americans Act. Designates services and criteria for eligibility and design; OAA specifically prevents AAAs from serving people under 60 except through family caregiving. Stephanie thanked Patty for her assistance accessing the meeting.

## **9. Miscellaneous Communication, Other Items**

1. Joint Annual Meeting – group voiced appreciation for presenters and information, access, and energy. Mindy raised possibility of rescheduling to a different, less busy, month. Discussion of alternatives, including splitting presentations into multiple meetings and/or moving to May for Older Americans Month.
2. Clay pointed to Ray's article in the Sentinel
3. Map of rural-designated communities under different measures.

## **9. Adjournment**

The meeting was adjourned at 11:51 AM.

Minutes prepared by: Zachary Johnson

**NEXT MEETING:** February 18, 2026



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**Date:** 2-13-26

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

**From:** Clay Kempf, Executive Director

**RE:** Advocacy Committee Report

This month's Advocacy Committee discussion focuses on our ongoing efforts to meet with local electeds to discuss our priority issues, including Master Plan on Aging Local Playbook implementation, the threats of SB 1249 implementation, and, as always, growing needs among the rapidly growing senior population.

We also discussed the impacts of ICE and Department of Homeland Security on our programs and those we serve. After lengthy discussion, we are putting together training sessions to help prepare staff in the event of an ICE or DHS encounter.

Additionally, we discussed the California Association of Area Agencies on Aging's (C4A) Budget Augmentation request. C4A is seeking a downpayment of \$52.2 million per year in ongoing funds to restore previous cuts and continue services being lost as COVID funds sunset, or, in the case of Caregiver Support, provide never-funded mandatory state match to Federal Family Caregiver Support Program funding. Caregiver Support has been identified by the Department of Aging as a "Core AAA" Program - despite the lack of any CDA-funding.

C4A is recommending the funds be distributed with *\$26.1 million allocated for Nutrition, \$15.66 million for Supportive Services, and \$10.44 for Caregiver Support.*

6.1-1



## AREA AGENCY ON AGING CSL UPDATE

January 2026

- **2026 Legislative Priorities**

To date three of our legislative proposals have been authored by legislators. They are:

**AP-2: Personal Income Tax: Senior Child Care Tax Credit - Authored by Sen Dahle**  
 (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.

**SP-2: Older Adult Education: Local Public Health Departments - Authored by Sen Choi**

(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-4: Automatic External Defibrillators - Authored by ASM Sanchez**

(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.

We will also be sponsoring legislation (AB 1359) that will enable Californians over the age of 80 to seek a permanent excuse from jury duty without a supporting letter, memorandum or note from a treating health care provider.

- **CSL Elections**

CSL Elections will be held in 2026. All CSL members must apply for re-election to a 4 year term. An email has been distributed to each Area Agency on Aging outlining the timeline for the application and election process. CSL members are to submit their application package through their Area Office on Aging.

Applications Due	March 31 2026
Elections conducted by each Area Agency on Aging	May/June 2026
Annual legislative session and swearing in of new members	October 2026



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**Date:** 2-12-26

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

**From:** Clay Kempf, Executive Director

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

### **AGENCY OPERATIONS & FUNDING**

Funding for the Older Americans Act and AmeriCorps was passed, approved, signed into law during the past month, to the tremendous relief of our staff and contracted service providers. Funding remained the same in most categories, with a slight 1% increase here and there.

While flat funding is great news compared to the cuts contained in the original Trump Administration Budget, flat funding does mean we'll experience about a 3% decrease in the services we can provide, due to inflation. In our PSA alone, that equates to over 5,100 fewer meals for seniors.

Budgets within our own agency remain problematic. The budget adopted at the beginning of the year was balanced based on each program generating additional review during the current year. While some progress was made, we continue to be short of the funds needed to support our operations. Program Directors who have failed to meet these goals are now charged with reducing costs to make up the difference. Details and discussions continue internally, and more information will be provided as action plans develop.

Program Directors have been holding regular meetings of a new Resource Development Committee, and we are now asking Board members to join and assist in the effort. The Committee will be meeting on the first Tuesday of each month from 10 a.m. to 12 noon.

The field work for our 2024-25 Independent Financial Audit has been completed, and Krystal Weaver will attend our meeting to distribute and review the audit results.

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

CDA continues to chug along with their California 2030 plans with very little interactive dialogue with the AAA network. CDA now only attends one out of three California Association of Area Agencies on Aging's (C4A) monthly meetings, and they have cancelled the fiscal/operations meetings with AAA staff & leadership. Typically attended by 125-150 AAA staff each month, the fiscal/ops meetings had deteriorated into questions needing to be submitted in advance of the meeting with answers read from a heavily vetted scrip. Live questions usually resulted in "we'll-have-to-get-back-to-you" responses. Despite the impressive attendance, the peers that I have spoken with generally feel the meetings were not productive.

CDA's staff are well-meaning and caring about older adults, but their direction appears to be to increase accountability, collect more data, publicize AAA shortcomings, and homogenize statewide services. IMO, efforts would be better spent utilizing existing data; addressing systemic shortcomings (e.g. failing state data tools), streamlining operations (not every funding augmentation should require separate contracts and reports; integrate them), highlight shrinking funding, and tell positive stories of miraculous work being done by underfunded organizations.

CDA's priorities and timeline for implement their 2030 plan remain the same to my knowledge, and still include:

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

**Timeline:** The tentative schedule for CDA to adopt these goals remains unchanged

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

The latest version of the **Intrastate Funding Formula** is also unchanged from last month. The current formula is a 180-degree turn from what was originally presented as our PSA goes from a funding ***decrease of \$234,336 to an increase of \$258,316 per year.***

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 and required state match, but they had discretion in how all other 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. CDA has indicated they prefer to make all funds, including the state overmatch, subject to federal approval.

Meanwhile, the makeup of existing AAAs is undergoing various changes. The **AAA of Ventura County**, operated directly by the County of Ventura, has announced they are giving up their AAA designation, primarily because the cost of running the program significantly exceeds available funding, and they can no longer bear the financial burden.

The non-profit **AAA of Santa Barbara & San Luis Obispo Counties** (like us, they are a two-county AAA) has been under duress, and CDA was in the process of de-designating them for poor performance. The non-profit informed CDA two weeks ago that they are voluntarily giving up their AAA designation. It's unclear as to whether the future boundaries of that AAA will remain the same, or if they'll be split into two parts, or combined with other organizations.

Sadly, the ADRCs (Aging & Disability Resource Connection) in these areas is being dismantled by CDA as a result of these changes. By all reports, it is a high-performing ADRC, but the CDA is citing that regulations require ADRCs to be a AAA/ILC (Independent Living Center) partnership, and if one of the partners changes, the ADRC designation is no longer valid. Hundreds of thousands of dollars of service will be lost as a result, and any future ADRC designation will have to start over from scratch, according to CDA.

### **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 had very productive Local Playbook workgroups meetings this month, and we were pleased to hear about continued progress in both counties towards achieving some of our local goals.

We're scheduled to make presentations about the Local Playbook on February 17 to the Santa Cruz County Seniors Commission, and have a couple temporary dates with the Community Foundation for San Benito County's Senior Planning Committee to do the same. Even more exciting, the idea of public presentations before elected bodies was embraced by the AAA Advisory Council last month, and we're in the process of working with them to set up presentations as part of the Older Americans Month activities in May. Britt, Corey, Zach and I are all able to make presentations in the event that we end up double-booked or unavailable for other reasons.

The Santa Cruz County Master Plan for Aging & Aging Friendly Communities Governance Committee hasn't had a quarterly meeting since our Board & Advisory Council met last month, so there is nothing new to report there. We asked to present our Local Playbook Powerpoint Overview to bring the Governance Committee up to date on our work, but County staff want to prioritize other items and activities. We'll continue to suggest the overview be part of the agenda.

Meanwhile, the Aging and Long Term Care Commission of San Benito County continues to be the oversight committee for the San Benito County Playbook, and includes the item as a standing report at their monthly meetings. Britt, Corey and I share pertinent information at each meeting.

#### **CHANGE IN OUR 403(B) RETIREMENT PLAN**

We are asking for a Board Resolution to make an administrative change to our 403b Retirement Plans. Simply put, we need to have the authority to assign retirement funds to a default account in the event when an employee fails to make a choice. The employee can always change their funds to a different account if they so choose.

#### **SERVICE PROVIDER PROGRESS REPORT & CSL ELECTIONS**

Included in your packets is a report regarding our contracted service providers and their progress towards meeting the annual goals in their contracts. Internally, we also track the program expenditures. Those aren't included here in part because providers use a variety of matching funds to deliver services, and the timing of their spending is often adjusted to match the timing of funds received, including those that come from us. As a result, spending reports are often misleading if presented in a chart.

Patty Talbott also reports on the upcoming elections for the California Senior Legislature. Both CSL Senator Mickie Luna and CSL Assemblyman Antonio Rivas have indicated they intend to run again.

## Congress Releases Final FY 2026 Funding Package, Wins for the Aging Network!

### Snapshot

*(A 30-second read for busy people)*

- Yesterday, Congress released a bipartisan, bicameral three-bill FY 2026 funding package that included Labor/HHS appropriations.
- Almost all OAA programs were level funded, with increases to OAA Title III B Supportive Services and Title VI Native American Aging programs, which were USAging priorities.
- The House is expected to vote on final passage of the minibus later this week followed by a vote in the Senate next week with the goal of getting the bill to the President's desk for him to sign it into law before January 30.
- For full details on the Labor/HHS levels, see [\*\*USAging's updated appropriations chart\*\*](#).

Yesterday, Congressional leaders released a bipartisan, bicameral FY 2026 funding package covering most of the federal government, including the Department of Labor and the Department of Health and Human Services (HHS), ahead of the January 30 deadline. The deal is the result of negotiations between appropriations leaders in the two months since Congress ended the longest government shutdown in U.S. history. HHS would be funded at nearly \$117 billion, a \$210-million increase.

In a win for the Aging Network and USAging's policy priorities, the package included modest increases for two of

our three top Older Americans Act (OAA) appropriations priorities—Title III B Supportive Services and Title VI Native American Aging Programs! Our third priority, the Title III E National Family Caregiver Support Program (NFCSP), also received an increase, but the added dollars were directed by Congress for demonstrations related to the National Family Caregiver Strategy and won't be a part of III E formula grants. We're also pleased that all of the other OAA programs at HHS, including the rest of Title III were protected from cuts—a key part of our collective advocacy over the past year.

Other programs that are critical to USAging members' work to support older adults also were protected, including the Community Services Block Grant (CSBG), the Low-Income Home Energy Assistance Program (LIHEAP) and the AmeriCorps senior volunteer programs. While the Department of Labor's OAA program, Title V Senior Community Service Program (SCSEP), received a \$10-million cut, that is the best possible outcome this year, given that the President and the House had proposed a full elimination of Title V funding. More details follow and can be found on USAging's updated [appropriations chart](#).

### **OAA and Other Critical Programs With Funding Level Changes**

- **OAA Title III B Supportive Services** \$414 million, a \$4-million increase
- **OAA Title III E NFCSP** \$209 million, a \$2-million increase
- **OAA Title VI Native American Aging Programs** \$40 million (Part A, Grants to Indians), a \$2 million increase; \$14 million (Part C, Native American Caregivers), a \$2-million increase

- **OAA Title V SCSEP** \$395 million, a \$10-million cut
- **LIHEAP** \$4.04 billion, a \$20-million increase
- **CSBG** \$810 million, a \$6-million increase

## Next Steps

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Congress has fewer than 10 days to pass the package for the President's signature before federal funding is set to lapse on January 30. The House is set to vote later this week, with the Senate to follow next week. While obstacles could arise, the deal is expected to be passed by Congress and represents the best possible outcome that USAging was pushing for: a final bill for the rest of the fiscal year (versus a continuing resolution) and the highest possible levels for our prioritized programs. It's a testament to our collective advocacy and our members taking consistent action over the course of this year to ensure the best possible outcome in a difficult budget environment.

USAging will keep members updated on FY 2026 funding, and should the package get to the President's desk, we will begin preparing for our FY 2027 appropriations campaign. Stay tuned!

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**This *Legislative Update* is a USAging membership benefit.** For more information about these and other federal aging policy issues, please contact USAging's policy team: Amy Gotwals, Olivia Umoren Ezeuko and Seth Ickes at [policy@usaging.org](mailto:policy@usaging.org), 202.872.0888.

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## FY 2023-2026 Labor/HHS Appropriations

As of February 4, 2026 (Dollars in thousands) Increases over prior year final funding are noted in **BOLD**. Decreases are noted in *italics*.

Older Americans Act and Other Key Aging Programs	FY 2023 Enacted Dec. 2022	FY 2024 Enacted 3.23.24	FY 2025 Continuing Resolution Enacted 3.14.25	FY 2026 President's Budget 6.11.25	FY 2026 Senate Comm. 7.31.25	FY 2026 House Comm. 9.8.25	FY 2026 House-Senate Deal 1.20.26	FY 2026 Enacted 2.3.2026
<b>Title III</b>								
B: Supportive Services & Centers	<b>410,000</b>	410,000	410,000	410,000	410,000	<b>414,000</b>	<b>414,000</b>	<b>414,000</b>
C1: Congregate Meals	<b>540,342</b>	<b>565,342</b>	565,342	565,342	565,342	565,342	565,342	565,342
C2: Home-Delivered Meals	<b>366,342</b>	<b>381,342</b>	381,342	381,342	381,342	381,342	381,342	381,342
NSIP	160,069	<i>112,000</i>	112,000	112,000	112,000	112,000	112,000	112,000
D: Preventive Health	<b>26,339</b>	26,339	26,339	26,339	26,339	26,339	26,339	26,339
E: Family Caregivers Support	<b>205,000</b>	<b>207,000</b>	<b>207,000</b>	207,000	<b>209,000</b>	207,000	<b>209,000</b>	<b>209,000</b>
<b>Title V</b> SCSEP (DOL)	405,000	405,000	405,000	0	<i>395,000</i>	0	395,000	395,000
<b>Title VI</b>								
A: Grants to Indians	<b>38,264</b>	38,264	38,264	38,264	38,264	<b>40,264</b>	<b>40,264</b>	<b>40,264</b>
C: Native American Caregivers	<b>12,000</b>	12,000	12,000	12,000	12,000	<b>14,000</b>	<b>14,000</b>	<b>14,000</b>
<b>Title VII</b>								
Ombudsman/Elder Abuse	<b>26,658</b>	26,658	26,658	26,885	26,658	<b>26,885</b>	26,658	26,658
Elder Rights Support + APS	<b>33,874</b>	33,874	33,874	<b>34,005</b>	33,874	<b>34,005</b>	33,874	33,874
<b>Title II</b>								
Aging Network Support Activities	<b>30,461</b>	30,461	30,461	30,461	30,461	30,461	30,461	30,461
ADRCs	8,619	8,619	8,619	8,619	8,619	8,619	8,619	8,619
Program Admin.	<b>47,063</b>	<b>48,063</b>	48,063	<i>37,500</i>	<i>41,000</i>	48,063	<i>41,000</i>	<i>41,000</i>
RDE Center	<b>5,000</b>	5,000	5,000	Unclear	Unclear	5,000	5,000	5,000
<b>Other AoA/ACL Programs</b>								
State Health Insurance Asst. Program	<b>55,242</b>	55,242	55,242	55,242	55,542	55,242	55,242	55,242
Community Care Corps	<b>5,500</b>	TBD	Unclear	Unclear	Unclear	5,500	5,500	5,500
CDSMP	8,000	8,000	8,000	0	8,000	8,000	8,000	8,000
Alzheimer's Disease Program Initiative		<b>31,500</b>	31,500	<i>16,800</i>	<i>16,800</i>	31,500	31,500	31,500
Elder Falls Prevention	<b>7,500</b>	7,500	7,500	<i>2,500</i>	7,500	7,500	7,500	7,500
Lifespan Respite Care	<b>10,000</b>	10,000	10,000	10,000	<b>11,000</b>	<i>10,000</i>	<b>11,000</b>	<b>11,000</b>
Senior Medicare Patrol		35,000	35,000	35,000	35,000	35,000	35,000	35,000
<b>Other HHS</b>								
Social Services Block Grant	1,700,000	1,700,000	1,700,000	1,700,000	1,700,000	1,700,000	1,700,000	1,700,000
Community Services Block Grant	<b>804,383</b>	804,383	804,383	0	<i>770,000</i>	<i>775,000</i>	<b>810,383</b>	<b>810,383</b>
LIHEAP: Low-Income Home Energy Assist.	<b>4,000,000</b>	<b>4,025,000</b>	4,025,000	0	<b>4,045,000</b>	<b>4,035,000</b>	<b>4,045,000</b>	<b>4,045,000</b>
<b>CNCS: AmeriCorps Seniors</b>	<b>236,917</b>	TBD	Unclear	0	236,917	<i>146,012</i>	236,917	236,917

7.2-4

**Amendment to the 403(b) Thrift Plan**

**of**

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

In accordance with the provisions of the Plan, the Employer hereby amends its Plan, effective as of March 1, 2026, as follows:

(1) **Section 1.12** is added to read as follows:

**1.12 DEFAULT INVESTMENT ALTERNATIVE**

Any contributions made on behalf of a Participant for which no investment direction is in effect shall be allocated to the following investment account, subject to the Participant's right to transfer those funds in accordance with Plan Section 6.3 and to change the allocation of future contributions in accordance with Plan Section 6.1:

(Select only one)

- (a) Mutual of America Composite Fund.
- (b) Fidelity VIP Asset Manager Portfolio.
- (c) Calvert VP SRI Balanced Portfolio.
- (d) Mutual of America Retirement Funds. Any amount allocated for a Participant or beneficiary under this alternative shall be placed in the Retirement Fund appropriate to their age at the time of allocation.

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

By: \_\_\_\_\_

Date: \_\_\_\_\_

7.4-1

**BOARD OF DIRECTORS RESOLUTION TO AMEND A PLAN**

**WHEREAS**, the Board of Directors of Seniors Council of Santa Cruz and San Benito Counties (the Employer) has assembled in a meeting;

**WHEREAS**, the Employer established the 403(b) Thrift Plan (the Plan) to provide retirement benefits for employees of the Employer; and

**WHEREAS**, the Employer has the right to amend the Plan pursuant to the provisions of the Plan.

**NOW, THEREFORE, BE IT RESOLVED THAT:**

- 1) This attached Plan Amendment is approved;
- 2) All other provisions and conditions of the Plan remain unchanged; and
- 3) The authorized representative is hereby directed to take such further action as may be necessary, appropriate or advisable to effectuate the foregoing resolutions.

The undersigned hereby certifies that the foregoing resolutions were duly adopted by the Board of Directors at the meeting referenced herein, and that the documents attached are the true copies of the documents referenced in those resolutions.

\_\_\_\_\_  
Secretary of Board / Board President

\_\_\_\_\_  
Date

7.4-2

**DATE: February 12, 2026**

**TO: AAA Advisory Council  
Seniors Council Board of Directors**

**FROM: Patty Talbott, AAA Administrator**

**RE: AAA Updates**

**Mid-Year Service Performance**

Attached with this item is a mid-year review of Area Plan funded services. Most providers are at or near their targets, and there are some extenuating circumstances for a couple that aren't. For example, Project SCOUT won't report units until spring after tax season is over. I&A is seeing a dip over last year, which may be due to increased internet information searches, and I am working with the provider to see if this trend continues.

Health Projects Center, our new Family Caregiver Support Program provider, had a slower launch than we anticipated, in part due to some data challenges unique to the IIIIE program on the AAA side that we navigated and just getting a new program up and running. HPC is already an experienced provider of IIIIE services for the Monterey County AAA but using a different data system there. Things are back on track and we're confident that they will be able to meet all targets by the end of the program year. Their Caregiver University will be held in San Benito County this year.

**California Senior Legislature Election**

This is an election year for the California Senior Legislature. The terms are four years and will begin in October of 2026. Both of our current Senior Legislators, Senior Senator Mickie Luna (San Benito County) and Senior Assemblymember Antonio Rivas ( Santa Cruz County) have announced their intention to run again for their respective offices. Information about the CSL can be found at: <https://4csl.org/>

**Area Plan Update**

Work is beginning on the 2026-27 Update to the 4-year Area Plan. Because services are contracted for four years, there will not be any significant changes in services, but updates are required for our Goals and Objectives and many of the appendices. Review of the update will be at the April meeting.

## 2025-26 SERVICE UNIT PERFORMANCE AREA PLAN FUNDED

PROVIDER AND SERVICE	CONTRACT	Q1	%	Q2	MID-YR	MID-YR %
<b>COMMUNITY BRIDGES</b>						
IIIC1 Congregate Meals	34,000	8,377	25%	7,814	16,191	48%
IIIC2 Home-Delivered Meals	100,500	34,927	35%	32,232	67,159	67%
IIIB Mealsite Transportation	5,800	2,086	36%	1,566	3,652	63%
<b>FAMILY SERVICE AGENCY</b>						
IIIB Peer Counseling	350	114	33%	89	203	58%
IIIB Visiting	350	98	28%	232	330	94%
<b>HEALTH PROJECTS CENTER</b>						
IIIE Comm Info (CGU SB Co)	1	0	0%	0	0	0%
IIIE Caregiver I&A	60	0	0%	0	0	0%
IIIE Caregiver Counseling	1,000	18	2%	195	213	21%
IIIE Caregiver Respite In-Home	3,000	344	11%	389	733	24%
IIIE Caregiver Consumables	60	2	3%	1	3	5%
<b>MARTHA'S KITCHEN</b>						
IIIC1 Congregate Meals	12,000	3,119	26%	3,374	6,493	54%
IIIC2 Home-Delivered Meals	26,000	7,073	27%	6,538	13,611	52%
<b>SENIOR LEGAL SERVICES</b>						
IIIB Legal Services hours	1500	448	30%	448	896	60%
<b>SENIOR NETWORK SERVICES</b>						
IIIB Case Management	450	417	93%	211	628	140%
IIIB Info & Assistance	8000	939	12%	979	1,918	24%
IIIB Visiting	50	30	60%	14	44	88%
<b>VOLUNTEER CENTER</b>						
IIIB Residential Repairs	300	71	24%	82	153	75%
MOB Sessions (8 classes/session)	4	2	50%	1	3	75%
MOB Seniors Served	50	23	46%	10	33	66%
<b>SR NETWORK - OMBUDS- EAP</b>						
Public Education Sessions	10	1	10%	1	2	20%
Training for Professionals	10	2	20%	0	2	20%
Training for IIIE Caregivers	3	0	0%	2	2	67%
Hrs. Dev Coord System	60	3	5%	36	39	65%
Ed Materials Distributed	300	75	25%	70	145	48%
Individals Reached	300	45	15%	60	105	35%
<b>AAA DIRECT</b>						
Project SCOUT Pers Aff Asst	500	0	0%	0	0	0%
Outreach (incl Farmers Mkt)	450	416	92%	0	416	92%
Nutrition Ed presentations	32	8	25%	8	16	50%
Nutriiton Ed participants	2800	1,209	43%	792	2,001	71%

8.5-2