



**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

## **SENIORS COUNCIL BOARD OF DIRECTORS**

**Thursday, March 19, 2026**

**10 a.m. – 12 Noon**

**Hybrid in-person - Zoom Meeting**  
**175 Westridge Dr., Watsonville, 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/j/81931049538>**

## **AGENDA**

- 10 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
- 10:10      5. Approve minutes of the February 2026 Board Meeting
- 10:15      6. Committee Reports
- A. Finance Committee

**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

- B. Advocacy Committee
  - a. State & Local Funding
  - b. Candidate Forum(s)
  - c. California Senior Legislature Report
- C. Executive Committee
  - Addition to Personnel Policies - Reasonable Accommodation Clause*
- D. Nominating & Board Development

- 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. Budget Shortfalls
  
- 11:30 8. Program Reports (written)
  - A. Foster Grandparent/Senior Companion Program
  - B. Aging & Disability Resource Connection (ADRC)
  - C. Volunteer Coordination Project
  - D. Project SCOUT
  
- 11:50 9. Miscellaneous Correspondence & Other Items
  
- 12 Noon 10. Adjourn

***Next Meeting:***

*10 am to 12 Noon  
Thursday, April 16, 2026*

### **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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## **SENIORS COUNCIL BOARD OF DIRECTORS**

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

**February 19, 2026**

### **MINUTES**

#### **BOARD MEMBERS PRESENT:**

Tami Aviles (President); Wayne Norton (Vice-President); Jane Schwickerath (Treasurer); Pam Arnsberger; Gwen Yeo; Antonio Rivas; Connie Padron; Mary Lou McKenney

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

Mickie Luna; Lisa Berkowitz

#### **STAFF PRESENT:**

Clay Kempf (Executive Director); Hilary Minugh (Fiscal Specialist); Patty Talbott (AAA Administrator); Zach Johnson (Administrative Services Officer); Corey Shaffer (Community Coordinator); Cathy Colvard (Fiscal Officer); Britt Bassoni (ADRC); Cristina Banuelos (FGP/SCP); Maureen Hebert (Fiscal Assistant)

#### **OTHERS PRESENT:**

None.

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

Meeting was called to order at 10:03 AM. Introductions were made.

#### **2. Additions & Deletions to the Agenda**

Pam requested an ADRC Advisory Committee update – added to 8.B

#### **3. Receive Announcements from Board Members**

None.

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

None present

#### **5. CONSENT AGENDA**

**MOTION, SCHWICKERATH/NORTON, to approve minutes of January 2026 Board Meeting. PASSED.**

#### **6. Committee Reports**

1. Finance Committee – Jane thanked Connie and Mary Lou for attending their first meeting recently.  
 Provided summary of program and agency reserves (not federal or state linked). Agency-wide report included in packet.  
 Clay pointed to 5.1.3-1 in packet, list of foundations including ‘Other’ that represents fundraising goals. This constitutes a large deficit in agency budget; since it has not been met by new income, must be met by savings. Board members are also asked to help generate new revenue.  
 Wayne suggested Advisory Committee members also be included in this task.
2. Advocacy Committee – Still seeking a chair, Tami and Wayne currently alternating in role. Discussion of potential responses/preparation for ICE activity. Preparing staff training that will also include service providers.
3. Executive Committee – Mark Trabing has resigned, currently seeking replacement Secretary; Jane filling role temporarily. Wayne noted that Santa Cruz County needs more representation, ideally from northern areas e.g. SLV.  
 Targeting 2027 for open-house/recruitment event.
4. Nominating & Board Development – Pam welcomed new Board members Connie and Mary Lou.  
 Orientation for new members being scheduled; Clay pointed to SC website, packets for additional information.
5. Employee 403(b) Update – 5.1.1-1 and 5.1.2-1, establishes a default fund for matching deposits if an employee does not select one. Employees may make changes at any time. Proposal to set default to ‘socially responsible’ fund Calvert VP SRI Balanced Portfolio. Wayne asked if fund has been performing well recently; Hilary said it was recommended by Mutual of America as mid-growth fund.  
**MOTION, SCHWICKERATHY/McKENNEY**, to adopt resolution authorizing default fund as Calvert VP SRI Balanced Portfolio. **PASSED**. Antonio abstains.

## 7. Executive Director’s Report

1. Agency Operations – Federal funds for current fiscal year are secured, including AmeriCorps. Clay commended everyone’s efforts on lobbying. However, flat funding equates to a 3% cut in services. Revisited need to decrease expenses.
2. SB 1249 & CDA’s 2030 Plan – Several updates on 7-2. Ventura County AAA abdicating back to CDA, future uncertain.  
 ADRCs also being impacted by dissolution of AAAs – CDA saying they will need to start from scratch with new applications. Potentially severe impact on local communities in interim. Broad discussion of role of CDA, ADRCs, AAAs, and relation to services. Pam complimented Britt’s work in San Benito County.
3. Master Plan for Aging & Solutions Summits –

## 8. Program Reports (written) –

- A. *Foster Grandparent/Senior Companion Program*
- B. *Aging & Disability Resource Connection (ADRC)*
- C. Volunteer Coordination Project – Corey meeting tomorrow about volunteer resource fair with Mindy Sotelo and others.
- D. *Project SCOUT*
- E. AAA Updates – Patty referred to 8.5-1, reported on Area Plan funded services. Wayne asked about home-delivered meals budget, which is 67% spent at halfway point of year.

5-2

Patty said services recalibrating after some funding streams expired, and in face of increased need.

- F. CSL Update – Antonio serving as senior assembly member, Mickey as senior senator. Election coming up in April; both are planning to run again. Antonio currently working on proposals addressing home care concerns and **designating and funding housing development for seniors throughout the state.**

**9. Presentation of 2024-25 Independent Financial Audit (Krystal Weaver, CPA, Walters and Kondrasheff)**

Independent financial audit required every year, has been completed again. Focused on FGP/SCP this time. No findings!

Krystal presented summary of financial statements for year ended June 30, 2025, provided to Board members and staff.

Antonio asked about any fallout from Jovenes de Antonio, Krystal said no because sub-monitoring was completed and issues uncovered.

Mary Lou asked about spending on emergency kits, Zach described distribution and demoed a kit. Patty noted that monitoring is a constant ongoing process, and that's how the JdA situation was detected. Antonio suggested meeting with San Benito Latino Coalition, which has funds for training and emergency/information kits.

**MOTION, NORTON/SCHWICKERATH, to accept audit report. PASSED.**

**10. Miscellaneous Correspondence & Other Items**

None.


**12. Adjourn**

The meeting was adjourned at 11:58 AM

Next Meeting: March 19, 2026 10 a.m. – 12 Noon

Minutes prepared by: Zachary Johnson



**DATE:** March 13, 2026  
**TO:** AAA Advisory Council  
**FROM:**  Patty Talbott, AAA Administrator/Planner  
**RE:** AAA UPDATES

**CALIFORNIA SENIOR LEGISLATURE ELECTION**

Every four years, each AAA is responsible for electing their representatives to the California Senior Legislature. This is an election year for the 2026-30 election.

Our Planning and Service Area (PSA 13) is designated two seats on the CSL, one Senior Senator and one Senior Assemblymember. Mickie Luna of Hollister currently serves as Senior Senator and Antonio Rivas of Watsonville serves as Senior Assemblymember. Both have submitted the required paperwork to run for another term. So far, there is one additional candidate who has picked up the paperwork to apply. **The deadline for receipt of applications for those interested in running for CSL is March 30<sup>th</sup>.**

**Election Process.** The CSL provides no funding for an election process. The AAA may choose the election process from those approved by the State CSL.

**The process and timeline is as follows:**

- I will submit all completed applications to the State CSL Office by March 31<sup>st</sup>.
- During the month of April, the State CSL office will review all applications and return approved application back to the AAA.
- At the May meeting of the AAA Advisory Council, the election will be held, provided there is a quorum. If there is not a quorum, the election would be held in June.

**AREA PLAN UPDATE**

I am currently at work on the 2026-27 Update to the 2024-28 Area Plan on Aging. The April meeting will serve as the public hearing of record for the Update.



## AREA AGENCY ON AGING CSL UPDATE

March 2026

- **2026 Legislative Priorities**

The following are our legislative proposals have been authored by legislators:

**Budget Request: (SP-1) Medi-Cal Personal Needs – Authored by ASM Ahrens**  
(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.

**SB 971: (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.

**SB 1095: (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.

**AB 1819 (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 are also sponsoring **AB 1359: Jury Service Exemptions - authored by ASM**

**Ahrens** which 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.

- **2025 Legislative Priorities**

**SB 1002 (AP-1) Out-State Physicians and Surgeons: Telehealth: License Exemption - Authored by Sen Niello** which would also include within the definition of “eligible patient” a patient whose immediately life-threatening disease or condition is in remission and the patient is continuing care with the previously established eligible out-of-state physician and surgeon, and would provide that those patients are not subject to the clinical trial requirement, as specified.

6.2-2

## AREA AGENCY ON AGING CSL UPDATE (cont'd)

- **CSL Elections**

**Applicants are to submit their application package through their Area Agency on Aging (AAA) Office NLT March 31, 2026.** Each AAA will conduct an election in May 2026. Elected CSL members will be sworn in at the October Annual Session.

### CSL Election Timeline

|  |                    |
|--|--------------------|
| CSL Applications due to your Area Agency on Aging (AAA) representative                 | March 31, 2026     |
| AAA's forwards CSL applications to CSL Hqs via CSL drop box                            | NLT April 6, 2026  |
| Review of applications by CSL Hqs and issuance of Certificates of Eligibility to AAA's | NLT April 30, 2026 |
| CSL Elections conducted by each AAA  | May/June 2026      |





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**Date:** 3-13-2026

**To:** Seniors Council Board of Directors

**From:** Zachary Johnson, Administrative Services Officer

**RE:** Proposed Amendment to Personnel Policies – Reasonable Accommodations

### **BACKGROUND**

The Americans with Disabilities Act of 1990 and its subsequent amendments makes it unlawful to discriminate in employment against a qualified individual with a disability. The law also requires employers to make reasonable accommodations for persons with disabilities. Reasonable accommodation is any change or adjustment to a job or work environment that permits a qualified applicant or employee with a disability to participate in the job application process, to perform the essential functions of a job, or to enjoy benefits and privileges of employment equal to those enjoyed by employees without disabilities.

To ensure that Seniors Council employees fully understand their rights under the ADA, we propose adding to the Personnel Policies a section detailing the Council's position and process for accommodation requests. This proposal also includes the accommodation request form on the following page.

### **PROPOSED TEXT – III.A.5. Reasonable Accommodations**

If the Seniors Council is made aware of an employee's disability and there is a need for accommodation, Human Resources or the employee's supervisor will engage with them in the interactive process. This process will determine what, if any, accommodations are necessary and reasonable to assist the employee in doing the essential functions of their job. Whether an accommodation is reasonable will be determined based on several factors, including whether it will effectively assist the employee in doing the essential functions of their job, the cost, and the effect on business operations. In most cases, employees will be required to provide documentation from an appropriate health care provider. Human Resources will provide employees with the necessary form. All employees are required to comply with safety standards.

Employees who pose a direct threat to the health or safety of themselves or others in the workplace may be temporarily moved into another position or placed on leave until it is determined if a reasonable accommodation will effectively mitigate the risk.

6.3-1

# Request for Reasonable Accommodation

Employee/applicant name: \_\_\_\_\_

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

Your response to these questions is voluntary, and you are under no obligation to provide this information. However, to consider your request for reasonable accommodation and to understand your abilities and limitations, we will go through an interactive process to discuss your needs and potential solutions so that you can perform the essential duties of your position. Medical certification may be required.

The information you provide below and our discussion in the interactive process will be kept confidential and to business necessity to the extent possible. All information will be used in compliance with applicable laws.

Describe the accommodation requested (be as specific as possible, for example equipment changes, physical restrictions, schedule, training, interpreter, etc.):

Explain the reason for this request (describe your disability-related limitations and how the accommodation requested can help you do your job; do not disclose a diagnosis):

Limitation is:    Permanent    Temporary    Unknown   Anticipated recovery date: \_\_\_\_\_

By signing, I certify that the information provided is true and accurate. I understand that any misrepresentation may result in a denial and potential disciplinary action.

Employee signature and date: \_\_\_\_\_

6.3-2



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**Date:** 3-12-26

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

**From:** Clay Kempf, Executive Director

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

**AGENCY OPERATIONS & FUNDING**

Monterey and Santa Cruz County Behavioral Health Departments have both informed us that because of internal reorganizations and regulatory changes, that they will no longer provide funding for our Senior Companion Program, effective July 1, 2026. Between the two counties, this represents a loss of about \$40,000 per year.

Program Directors continue to hold regular meetings of our new Resource Development Committee, and Board members Tami Aviles, Antonio Rivas and Mary Lou McKenny joined the effort this month. The Committee meets on the first Tuesday of each month from 10 a.m. to 12 noon.

Project SCOUT staff and devoted volunteers are in the heart of their busiest time of the year. Highlighting these local efforts and with support of Golden State Opportunities and Assemblymember Robert Rivas' staff, SCOUT held a "Tacos and Taxes" day at the Watsonville Public Library on Friday, February 27th, with eleven volunteer tax preparer's present to help dozens of local residents with their tax filing.

Program Director Cristina Bañuelos is busy preparing Americorps grants for both the Foster Grandparent and Senior Companion Programs for the three fiscal years of 2026-2029. Totaling well over \$1 million per year, these grants provide the vast majority of funding for both programs, and represents our second-largest funding source, topped only by the Older Americans Act administered by California's Department of Aging.

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

CDA continues to chug along with their California 2030 plans. The next sharing of information will take place with a webinar on April 7, 2026. The tentative agenda is to provide an update on the status of CDA implementation plans. Unfortunately, there

continues to be 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 some time ago 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.

Most of this report repeats information already shared twice before, but due to its potentially devastating impact on our organization and the older adults of Santa Cruz & San Benito Counties, I think it's critically important to repeat it here once again, and probably again in upcoming months.

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. I suggested to them yet again that they NOT include state overmatch funds in the Funding Formula that they submit to the federal government for approval. They can still use the same formula for the distribution of the funds, but keeping it separate from the federal formula allows for flexibility if it is needed in the future.

Meanwhile, the makeup of existing AAAs is undergoing various changes. The **AAA of Ventura County**, operated directly by the County of Ventura, has now asked for a delay in their previous announcement they are giving up their AAA designation, after a lengthy debate by their Board of Supervisors and a 3-2 vote in favor of the delay. The primary reason for their original decision to give up the AAA is that the cost of running the program significantly exceeds available funding, and they can no longer bear the financial burden. After realizing that not having a clear transition plan in place could have serious implications as well, the Board debated the pros and cons of de-designation and the 3-2 vote took place.

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 are 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 has decided that 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.

It has been suggested that CDA keep the ADRCs intact by simply including the operation of the ADRC as part of Requests For Proposals for AAA operations in these planning and service areas. Department leadership rejected this suggestion, saying the ADRC operations are optional, and that CDA won't force a AAA into operating an ADRC. Unfortunately, CDA doesn't seem to have any hesitancy in forcing a AAA and an ILC to shut down an existing ADRC as part of the de-designation process. That choice makes many AAA directors question if CDA's priorities lie with serving older adults or with flexing bureaucratic authority.

California Senator John Laird is attempting to intervene in this situation and is now carrying SB 1261 that will provide a one-to-two-year hiatus to the shutdown of an ADRC

for transitioning AAAs, to allow the new AAA time to continue ADRC operations if they choose, rather than shut them down automatically. SB 1261 adds the following language to existing ADRC statute:

*"(g) (1) Notwithstanding any other law, the California Department of Aging shall not revoke the designation of an ADRC program solely due to the revocation of a designation, suspension, or temporary inability of either the area agency on aging or the independent living center partner to serve in its operator role. In those circumstances, either the area agency on aging or the independent living center may continue to operate the ADRC independently during a transition period of not less than one year and not more than two years, upon agreement of the California Department of Aging, the Department of Rehabilitation, and the Aging and Disability Resource Connection Advisory Committee, while a new or replacement partner is identified and designated.*  
*(2) During the transition period described in paragraph (1), the services provided by the ADRC shall continue without interruption, and joint operation shall be reestablished upon designation of the replacement partner that serves older adults or is a peer-led disability organization."*

#### **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 made presentations about the Local Playbook on February 17 to the Santa Cruz County Seniors Commission, and with the Community Foundation for San Benito County's Senior Planning Committee. Public presentations before elected bodies remains in the queue as well via the assistance of City and County representatives on the AAA Advisory Council. The hope is that the playbooks can be used to highlight 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.

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.

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

Service Provider engagement continues as part of our regular functions, including regular informal check-ins and the receipt and review of provider performance and fiscal reporting. Formal monitoring of each of our contracted service providers begins next month.

California Senior Legislature (CSL) elections are on the horizon, and so far with have three applicants for the two seats, including CSL incumbants Senator Mickie Luna and Assemblyman Antonio. We anticipate holding the elections during our May AAA Advisory Council meeting, and inviting non-members aged 60 & above to join in the voting. More details will be provided as the date nears.

**BUDGET SHORTFALLS**

All of our programs started the year with targeted revenue enhancement goals as part of their 2025-26 fiscal year budgets. Efforts to reach these goals have left us significantly short in most of our programs, in the following amounts:

|                                   |  |
|-----------------------------------|--|
| Senior Companion Program          | \$41,000                                 |
| AAA (including Volunteer Program) | \$70,000                                 |
| Administration                    | \$68,000 (plus \$43,000 use of reserves) |

These shortages are partially offset and/or exacerbated by our 6/30/25 audited program and agency reserves and deficits (see attached) in the amounts of:

|                            |                   |
|----------------------------|-------------------|
| Senior Companion Program   | \$178,986         |
| Foster Grandparent Program | <b>(-\$5,501)</b> |
| AAA                        | \$23,257          |
| ADRC                       | <b>(-\$3,266)</b> |
| Administration             | \$252,903         |
| <b>Agency-wide total</b>   | <b>\$656,501</b>  |

The Senior Companion Program deficit is being reduced by about \$25,000 through the redirection of funds that would otherwise be unused.

The AAA is part of a 2026-27 budget augmentation request that will yield about \$180,000 in new funding if awarded, or \$90K if funded at 50% of the proposed amounts, but I consider that a longshot, at best.

Admin's deficit is more problematic, however, as Admin revenue is generated by the expenses of individual programs. If those program budgets shrink (which they have been), so does Admin's revenue. Administrative overhead was already increased this current year from 10% to 12%

Discussions with Program Directors and staff about ideas for cutting costs (or raising revenues) haven't produced any miracle solutions. Personnel costs are about \$1.5 million per year; volunteer stipends and travel \$750,000, and grants to contracted service providers about \$2.4 million. Our next highest category is space costs, which total \$105,000. Total budget is approximately \$5 million per year. Stipend payments can't be used for any other purpose. Some contracted service provider funding could be shifted to direct service programs, but doing so would typically require new services (and therefore new expenses) to be incurred. That doesn't leave us with many

expense-saving options other than reducing staff; never a popular decision, and rarely a productive one.

At this point, my approach is that we use our existing reserves to finish out 2025-26; continue to seek new revenue for this year and the future, and develop staffing changes that balance 2026-27 budgets. Anticipated or hoped-for revenue enhancements can't be included in these budgets unless they are confirmed.

Our hard-working and incredibly dedicated staff all deserve a better fate than reduced hours and flat wages, of course, but we have little choice. All alternative ideas are welcomed, and specific plans will be shared internally and brought to future Board meetings.

## Seniors Council Reserves by Program

Updated February 2026 with audited financials

| Board Approved Reserve Goals  | CFL  | SCOUT     | SCP       | FGP       | AAA        | ADMIN      | ADRC      | Falls Prev | IN-KIND | AGENCY TOTAL |
|---|------|-----------|-----------|-----------|------------|------------|-----------|------------|---------|--------------|
| "Short Term Plan"<br>One month reserve goal<br>(based on 24/25 expenses)  | \$ - | \$ 15,321 | \$ 18,550 | \$ 31,530 | \$ 46,148  | \$ 41,021  | \$ 15,001 | \$ -       | \$ -    | \$ 167,571   |
| "Long Term Plan"<br>Three month reserve goal<br>(based on 24/25 expenses) | \$ - | \$ 45,963 | \$ 55,650 | \$ 94,590 | \$ 138,444 | \$ 123,063 | \$ 45,003 | \$ -       | \$ -    | \$ 502,713   |

| Audited Profit & Loss Totals       | CFL             | SCOUT             | SCP               | FGP               | AAA              | ADMIN             | ADRC              | Falls Prev      | IN-KIND           | SUM OF ALL PROGRAM P&L'S |
|------------------------------------|-----------------|-------------------|-------------------|-------------------|------------------|-------------------|-------------------|-----------------|-------------------|--------------------------|
| FY 24/25                           | \$ (441)        | \$ (14,057)       | \$ (3,008)        | \$ 15,580         | \$ 833           | \$ 36,091         | \$ (2,670)        | \$ 149          |                   | \$ 32,476                |
| FY 23/24                           | \$ (395)        | \$ 37,476         | \$ 600            | \$ (15,368)       | \$ (13,586)      | \$ 7,272          | \$ (1,805)        | \$ (201)        |                   | \$ 13,993                |
| FY 22/23                           | \$ 1,419        | \$ 42,545         | \$ (5,502)        | \$ 16,404         | \$ (19,722)      | \$ 5,890          | \$ (564)          | \$ 4,389        |                   | \$ 44,859                |
| FY 21/22                           | \$ (12,109)     | \$ 34,740         | \$ 18,260         | \$ (51,560)       | \$ (2,317)       | \$ 15,057         | \$ 251            | \$ 29           |                   | \$ 2,351                 |
| FY 20/21                           | \$ 1,928        | \$ 9,680          | \$ 94,214         | \$ 99,760         | \$ 42,729        | \$ 99,180         | \$ 1,226          | \$ 3,109        |                   | \$ 291,826               |
| Internal Reserve Reconciliation    | \$ -            | \$ (5,944)        | \$ (11,154)       | \$ (56,284)       | \$ 73,382        | \$ -              | \$ -              | \$ -            |                   | \$ (0)                   |
| FY 19/20                           | \$ 818          | \$ 45,274         | \$ 47,114         | \$ 99,950         | \$ (73,495)      | \$ 138,897        | \$ 296            | \$ 458          |                   | \$ 259,312               |
| FY 18/19                           | \$ (24,709)     | \$ 24,009         | \$ (2,663)        | \$ (40,816)       | \$ 48,418        | \$ 10,516         | \$ -              | \$ -            |                   | \$ 14,755                |
| FY 17/18                           | \$ (98)         | \$ 5,677          | \$ 5,801          | \$ 33,352         | \$ 28,486        | \$ -              | \$ -              | \$ -            |                   | \$ 73,218                |
| Prev 6 Yrs                         | \$ 36,700       | \$ 25,625         | \$ 35,324         | \$ (106,519)      | \$ (61,471)      | \$ -              | \$ -              | \$ -            |                   | \$ (76,289)              |
| <b>Reserve Total as of 6/30/25</b> | <b>\$ 3,113</b> | <b>\$ 205,025</b> | <b>\$ 178,986</b> | <b>\$ (5,501)</b> | <b>\$ 23,257</b> | <b>\$ 252,903</b> | <b>\$ (3,266)</b> | <b>\$ 7,933</b> | <b>\$ (5,948)</b> | <b>\$ 656,501</b>        |
| One month reserve goal met         |                 | Yes               | Yes               | No                | No               | Yes               | No                | Yes             | No                |                          |
| Three month reserve goal met       |                 | Yes               | Yes               | No                | No               | Yes               | No                | Yes             | No                |                          |

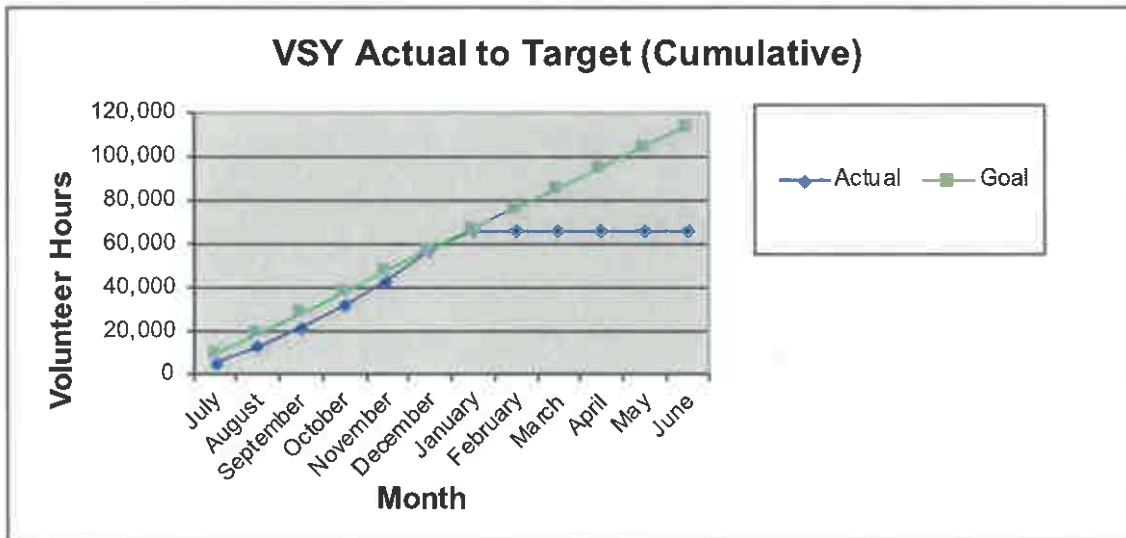


**Project Name: Seniors Council Foster Grandparent Program**

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

| Month        | Cumulative Hours Actual | Cumulative Hours Goal | Monthly VSYS Actual | Monthly VSYS Goal | Monthly Hours Actual | Monthly Vols. Active | FY 24-25 Actuals | Annual VSYS Goal |
|--------------|-------------------------|-----------------------|---------------------|-------------------|----------------------|----------------------|------------------|------------------|
| July         | 5,499                   | 9,483                 | 5.27                | 9.08              | 5,499                | 124                  | 5,316            | 109              |
| August       | 12,921                  | 18,966                | 7.11                | 9.08              | 7,422                | 117                  | 6,996            | 109              |
| September    | 21,992                  | 28,449                | 8.69                | 9.08              | 9,072                | 113                  | 8,793            | 109              |
| October      | 31,502                  | 37,932                | 9.11                | 9.08              | 9,510                | 114                  | 9,446            | 109              |
| November     | 42,881                  | 47,415                | 10.90               | 9.08              | 11,379               | 113                  | 10,945           | 109              |
| December     | 56,914                  | 56,898                | 13.44               | 9.08              | 14,033               | 117                  | 12,266           | 109              |
| January      | 65,883                  | 66,381                | 8.59                | 9.08              | 8,969                | 119                  | 10,779           | 109              |
| February     | 65,883                  | 75,864                | 0.00                | 9.08              |                      |                      | 8,020            | 109              |
| March        | 65,883                  | 85,347                | 0.00                | 9.08              |                      |                      | 11,392           | 109              |
| April        | 65,883                  | 94,830                | 0.00                | 9.08              |                      |                      | 11,665           | 109              |
| May          | 65,883                  | 104,313               | 0.00                | 9.08              |                      |                      | 9,246            | 109              |
| June         | 65,883                  | 113,796               | 0.00                | 9.08              |                      |                      | 5,055            | 109              |
| <b>TOTAL</b> |                         |                       | <b>63.11</b>        |                   | <b>65,883</b>        |                      | <b>109,918</b>   |                  |

Total VSYS Achieved

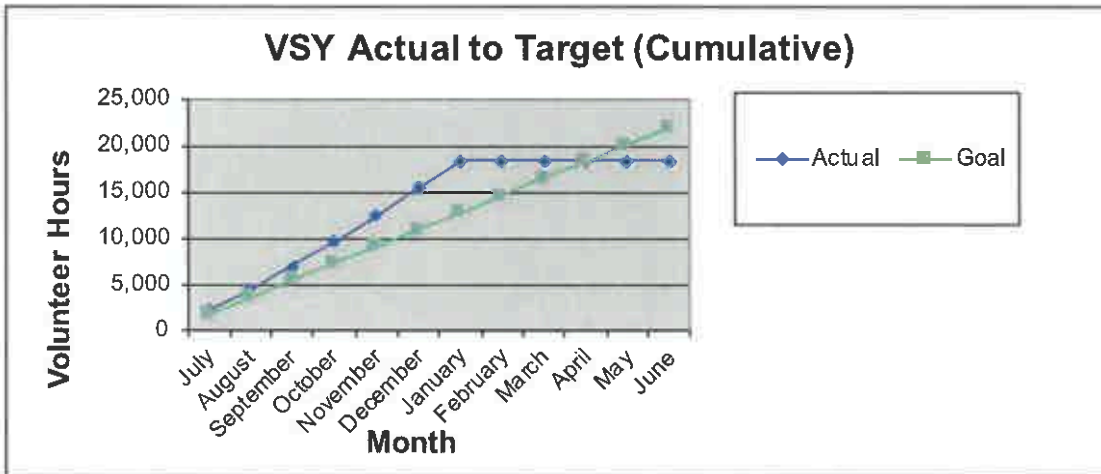


**Project Name: Seniors Council Senior Companion Program**

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

| Month        | Cumulative Hours Actual | Cumulative Hours Goal | Monthly VSY Actual | Monthly VSY Goal | Monthly Hours Actual | Monthly Vols. Active | FY 24-25 Actuals | Annual VSY Goal |
|--------------|-------------------------|-----------------------|--------------------|------------------|----------------------|----------------------|------------------|-----------------|
| July         | 2,283                   | 1,827                 | 2.19               | 1.75             | 2,283                | 29                   | 1,837            | 21              |
| August       | 4,405                   | 3,654                 | 2.03               | 1.75             | 2,122                | 29                   | 1,608            | 21              |
| September    | 7,016                   | 5,481                 | 2.50               | 1.75             | 2,612                | 32                   | 1,909            | 21              |
| October      | 9,731                   | 7,308                 | 2.60               | 1.75             | 2,715                | 32                   | 2,055            | 21              |
| November     | 12,534                  | 9,135                 | 2.68               | 1.75             | 2,803                | 32                   | 2,504            | 21              |
| December     | 15,557                  | 10,962                | 2.90               | 1.75             | 3,023                | 32                   | 2,614            | 21              |
| January      | 18,430                  | 12,789                | 2.75               | 1.75             | 2,873                | 31                   | 2,159            | 21              |
| February     | 18,430                  | 14,616                | 0.00               | 1.75             |                      |                      | 1,643            | 21              |
| March        | 18,430                  | 16,443                | 0.00               | 1.75             |                      |                      | 1,989            | 21              |
| April        | 18,430                  | 18,270                | 0.00               | 1.75             |                      |                      | 1,585            | 21              |
| May          | 18,430                  | 20,097                | 0.00               | 1.75             |                      |                      | 1,959            | 21              |
| June         | 18,430                  | 21,924                | 0.00               | 1.75             |                      |                      | 1,688            | 21              |
| <b>TOTAL</b> |                         |                       | <b>17.65</b>       |                  | <b>18,430</b>        |                      | <b>23,547</b>    |                 |

Total VSYs Achieved



8.1-2



## ADRC of San Benito County Staff Report – March 2026

The ADRC of San Benito County direct service staff have been working the last several weeks, on Wednesday evenings, in support of Project SCOUT's evening tax assistance hours, at the Pauline Valdivia Memorial Community Center (PVMCC), in Hollister. Tax assistance is provided between the hours of 5PM and 8PM, through the end of tax filing season, April 15, 2026. Led by Seniors Council's own, Eduardo Santana, Project SCOUT provides free tax assistance to seniors, individuals with a disability, low-income families and other individuals in Santa Cruz County. They also provide assistance with general tax questions. The service is limited to those with reportable income of \$67,000 or less, and assists with only simple tax returns.

If you or someone you know wants to do your own taxes for free, Project SCOUT offers a "Facilitated Self-Assistance" (FSA) option for those with income of \$84,000 or less. FSA is for current year tax returns **ONLY**. There are no restrictions on State filings or on any forms. A link to the service is available at: <http://tinyurl.com/SCOUTFSA>. Volunteers will be available to help with questions as you use the FSA option. If you need help with or throughout the process, please call 831-724-2606, or e-mail Ed and his volunteers at [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org).

Owing to the high demand for services at this time, please call 831-724-2606 and leave a message with:

- Your full name
- Your telephone number
- What city are you calling from

Or, email [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org) with the same information. Please only request an appointment once to schedule an appointment for service on Wednesdays at the PVMCC, as well as via the other tax assistance locations and events, to ensure Project SCOUT has both the time and volunteer availability needed to make sure you receive the assistance you need at trust. A list of the back-up documentation needed to facilitate an appointment with Ed or one of the trained Project SCOUT volunteers, can be found by going to <https://seniorscouncil.org/project-scout/>

ADRC No Wrong Door Network program staff have nearly completed update work on the San Benito Aging & Disability Resources Directory for 2026. The print-copy update is the first since 2024, but the digital directories, available at <https://sanbenitoadrc.org/resource-directory/>, have been continually updated during this time, and both the English and Spanish version available via the URL are always the most comprehensive and up-to-date versions available. An added benefit of the on-line and digitized versions is that one is able to print just the section or sections needed, in a PDF format, saving resources and otherwise supporting changing needs for resources and service information. After seeking a few competitive bids for printing of the directory, we hope to have copies available for distribution by mid or late April.

ADRC No Wrong Door program staff continue to assist 50-100 individuals monthly, from its office location inside the PVMCC, with everything from simple information or referral requests to complex and more work intensive person-centered case management or transition assistance needs. At least a

couple of the advantages stemming from working directly with ADRC staff is their comprehensive knowledge of area service supports, especially in the older adults and disabilities service realms, and ADRC staff's willingness to help in creating and initiating and collaborative care plan, in which the consumer can and is encouraged to take an active role in addressing their needs. ADRC staff is skilled in determining potential eligibility and in helping to complete applications for assistance, with the goals of effectively addressing and resolving consumer needs where possible.

ADRC No Wrong Door Management and administrative staff have been exploring ways, over the past several years, and more intentionally during the course of the current fiscal year, to achieve greater program funding sustainability and to gather more local funding support for the importance services provided by ADRC program staff and by ADRC No Wrong Door Network partners. Topics of interest and discussion have included the cultivation of donations from local individuals and business, the introduction and adoption of fundraising from local events and activities, seeking philanthropic support from local, regional, and state-based foundations, and applying for program and services specific grants from private and public institutions. While the ADRC project deficit is small this year, right around \$10,000, this deficit is likely to grow in coming years, and the attractiveness of having local buy-in and the unrestricted funding from such sources will allow the ADRC to continue to operate solvently and with more flexible funding to meet changing and emergent needs.

Second quarter FY25/26 ADRC Program Service Data Reporting wrapped up on January 30, 2026. No Wrong Door (NWD) Network partners continue to be encouraged to provide data for the services they delivered to consumers in San Benito County. As a reminder, ADRC program staff never claim these data and these delivered services as their own, but instead use the reported data to shine a bright light on the efforts of locally-focused programs and organizations - - as a part of the NWD Network - - to help meet the service needs of older adults, individuals living with disability, and caregivers, and to help them navigate complex service systems to access the support they need to live safely and successfully in their community of choice. The ADRC is by definition our local collaborative of NWD service providers working in a coordinated and communicative manner, and for the benefit of consumers, as well as those participating programs and organizations.

Finally, and to reiterate an important aspect of current ADRC work mentioned in previous reporting, inclusive and diverse communities make for stronger individuals and families and more resiliency for all, and the ADRC is proud to be an on-going and forward-looking champion of such an inclusive, positive, and strengths-based approach to addressing both individual and community needs. The ADRC serves all individuals, families, and caregivers regardless of income, ethnic origin, or immigration status, per the statute and regulation which created the ADRC No Wrong Door Network federally and within the State of California. Additionally, and as an on-going focus of the ADRC in 2026, we will continue to advance the connection and further the collaborative work being done between the ADRC of San Benito County and the San Benito Connect – Volunteer Services Development Program, as this partnership benefits both programs. 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.



## **Volunteer & Communication Infrastructure Report**

Prepared for the Senior Ad Hoc Committee

Community Foundation for San Benito County

February 27, 2026

Prepared and Submitted by:

Corey Shaffer

Community Coordinator

Senior Services Planning & Volunteer Engagement

Seniors Council – San Benito County

### **1. Overview**

In alignment with the Memorandum of Understanding (executed May 2024), 2025 efforts focused on building foundational infrastructure to support volunteer recruitment, communication, and community engagement throughout San Benito County.

Since the launch of SBCVolunteers.org in February 2025, the platform has established a centralized and operational volunteer infrastructure serving San Benito County. The system provides centralized volunteer recruitment, opportunity posting, response tracking, and hours management for participating agencies.

### **Key Launch Milestones**

- January 2025 – Launch of the monthly San Benito County Seniors Connect Newsletter
- February 2025 – Official launch of SBCVolunteers.org

Together, these systems established a centralized communication platform and volunteer recruitment framework to support ongoing community engagement.

## **2. Volunteer Website Performance Snapshot**

- 54 registered volunteer users
- 21 active agencies registered on the platform
- 7 active volunteer opportunities posted
- 14 volunteer opportunity responses submitted through the platform
- The hours tracking and approval system is fully operational. We are now working with these agencies to begin consistently logging their volunteer hours.
- Participation across multiple service sectors including senior services, food security, hospice, advocacy, and community partners

The platform is fully operational and actively utilized by agencies and community members. Growth trends show increasing volunteer registration and agency participation, demonstrating the establishment of sustainable digital volunteer infrastructure.

## **3. Newsletter Performance (Past 12 Months)**

- Emails sent: 5,998
- Emails delivered: 5,843
- Open rate: 56% (above industry average)
- Total opens: 3,251
- Average click rate: 4%
- Total clicks: 257
- Current subscribers: 347
- Subscriber growth (past 30 days): 2%

The newsletter performs above industry benchmarks and serves as the primary communication vehicle for volunteer opportunities, events, and senior-focused resources.

## **4. Digital & Social Media Presence**

### **San Benito Connect Volunteers**

- Facebook page launched January 2026
- Instagram account (@sbcvolunteers) launched 2026
- Used to promote volunteer opportunities, website traffic, and community events

### **Seniors Council Social Media (Existing Platform)**

- Facebook page with 234+ followers
- Used to cross-promote volunteer platform, senior services, and community initiatives

### **Cross-Platform Coordination**

- Website
- Newsletter
- Facebook
- Instagram

Foundational digital visibility has been established to support long-term growth and engagement.

## **5. Outreach & Marketing Strategy Implemented**

### **Paid & Print Advertising**

- Bus stop advertising campaign
- Mission Village Voice advertisements
- BenitoLink print and digital advertising
- Pre-movie theater advertisement
- Direct mail campaign promoting volunteer website

## **Community Outreach & Presentations**

- County Supervisors Angela Curro and Mindy Sotelo Town Hall meetings (Twin Oaks & Trilogy retirement communities)
- Rotary (San Juan Bautista) presentation
- Retired Public Employees Association, Chapter 106
- Community Resource Fair – Tacos & Taxes
- Hollister Farmers' Market
- High School Resource Fair participation
- Ongoing Master Plan for Aging presentations

## **Distribution & Partnership Outreach**

- Flyers distributed through Chamber of Commerce
- Flyers distributed through Hollister Downtown Association (HDA)
- Outreach to local churches and community organizations
- Employer outreach to include volunteer flyers in retiree packages
- Upcoming large-scale flyer mailing campaign

## **6. 2026 Growth Strategy & Upcoming Initiatives**

- Volunteer & Resource Fair (targeting August 2026) – planning phase
- Volunteer Recognition component under development
- Continued employer and retiree outreach expansion
- Increased organization participation on volunteer platform
- Continued newsletter subscriber growth and engagement

**With foundational infrastructure established in 2025, 2026 efforts focus on scaling participation, increasing volunteer listings, expanding partnerships, and strengthening measurable community impact.**

8.3-4



## **Master Plan for Aging (MPA)**

### **San Benito County – Progress Snapshot**

Prepared for the Senior Ad Hoc Committee

Community Foundation for San Benito County

February 27, 2026

Prepared by:

Corey Shaffer

Community Coordinator

Senior Services Planning & Volunteer Engagement

Seniors Council – San Benito County

### **1. Overview**

In alignment with the State of California’s Master Plan for Aging and local planning efforts, San Benito County continues to convene and coordinate five cross-sector workgroups:

- Housing for All Ages & Stages
- Health Reimagined
- Inclusion & Equity, Not Isolation
- Caregiving That Works
- Affording Aging

The workgroups operate in both individual and combined formats to promote alignment across shared issues such as housing, transportation, affordability, access, and social connection.

The Seniors Council supports facilitation, documentation, coordination, and partner engagement for these efforts.

## **2. Infrastructure & Alignment Progress**

- Established ongoing multi-sector participation including County departments, the Aging & Disability Resource Connection (ADRC), Behavioral Health, Gavilan College, nonprofit providers, and community partners
- Implemented combined workgroup format to improve cross-goal coordination
- Shared and utilized the local MPA playbook as a guiding framework
- Strengthened communication between County planning efforts and community partners
- Integrated Older Americans Month / Affordable Housing Month alignment planning across jurisdictions

This structure ensures continued collaboration while maintaining clear goal-area focus.

## **3. Goal Area Highlights**

### **Housing for All Ages & Stages**

- The County Housing Element was submitted to the California Department of Housing and Community Development (HCD) and awaiting feedback
- Revisited senior-friendly housing fact sheet/packet for follow-up and next steps
- Coordinating May recognition efforts tied to housing and Older Americans Month
- Discussion of Assisted Living Waiver (ALW) access and Section 8/Housing and Urban Development (HUD) & Veterans Affairs Supportive Housing (VASH) updates

## **Health Reimagined**

- Matter of Balance fall prevention classes continue with strong participation
- Exploring additional host sites and volunteer expansion
- Continued discussions around chair yoga, Tai Chi, and Parks & Rec partnerships
- Alignment with “Blue Zones” and community walkability concepts
- Ongoing exploration of arts-based and enrichment programming for seniors

## **Inclusion & Equity, Not Isolation**

- Tech Help Tuesdays continue through the library (monthly sessions)
- Exploring partnership with Gavilan College for student volunteers
- Promoting tech help resources and Aging & Disability Resource Connection (ADRC) referrals
- Expanding digital literacy outreach and flyer distribution
- Ongoing discussion of reducing barriers to participation in education and enrichment programs

## **Caregiving That Works**

- Continued coordination with Gavilan College regarding caregiver training program
- Identified enrollment and cost barriers (~\$1,200 course cost)
- Explored scholarship possibilities and alternative shorter “intro” caregiver education options
- Discussed marketing strategies including Caregiver University outreach
- Action items established to clarify curriculum details and enrollment process

## **Affording Aging**

- Financial Guide project revisited to address review and distribution barriers
- Identified need for qualified reviewer and sustainable distribution model
- Exploring digital-first format with QR/postcard outreach
- Discussed potential education sessions and financial literacy partnerships
- Emphasis on moving forward with a practical, usable version and improving over time

## **4. Cross-Workgroup Coordination**

- Hazel Hawkins Community Needs Assessment participation encouraged
- Volunteer spotlight and recognition planning underway
- Community event engagement and partner visibility strengthened
- Discussion of long-term outcome tracking and benchmark alignment

## **5. Next Steps**

- Continue structured facilitation and documentation of workgroups
- Support continued advancement and implementation of the local MPA Playbook in alignment with organizational leadership.
- Maintain cross-sector engagement and alignment
- Identify measurable outcome tracking opportunities across goal areas

## **Overall Assessment**

**San Benito County's Master Plan for Aging workgroups remain active, collaborative, and solution-oriented. The infrastructure for sustained coordination is in place, with continued focus on practical implementation and community engagement.**



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 & CalFresh Assistance

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

## PROJECT SCOUT End of February 2026 Report

Project SCOUT has started tax season 2026 in full force. These are the following sites providing weekly services.

### 2026 Tax Prep Sites\*

- 1-ALL: Project SCOUT Tax Facilitated Sel Assistance ONLINE <http://tinyurl.com/SCOUTFSA>
- 2-Project SCOUT VITA (Ad hoc, remote, & special events such as Tacos & Taxes & Davenport Resource Center).
- 3-Highlands Park Community Center Wednesday and Thursday 10-1 by appointment (Ben Lomond)\*.
- 4-Felton Public Library Saturday 10-1 by appointment\*.
- 5-Santa Cruz Public Library Downtown Tuesday and Saturday 10:30-3 by appointment\*.
- 6-London Nelson Community Center Monday 9:30-1 by appointment (Santa Cruz)\*.
- 7-Market Street Senior Center Wednesday 1:30-3:30 First-come, first-served. Seniors and disabled (Santa Cruz).
- 8-Capitola Public Library Wednesday 2-5 by appointment\*.
- 9-Mid-County Senior Center Wednesday 9-12 by appointment. Seniors and disabled (Capitola)\*.
- 10-Aptos Public Library Tuesday 10-2 by appointment\*.
- 11-La Manzana Community Resources Tuesday 9-2 by appointment (Watsonville)\*.
- 12-Watsonville Public Library Wednesday 1-7 First-come, first-served.
- 13-Watsonville Senior Center Tuesday 9-12 & Thursday 10-3 by appointment. Seniors and disabled.
- 14-San Juan Bautista Public Library 2nd Thursday of the month 1-4 by appointment\*.
- 15-Pauline Valdivia Memorial Community Center Wednesday 2-4:30 by appointment (Hollister)\*.

Appointments are taken by calling 831-724-2606 or emailing [projectscout@seniorscouncil.org](mailto:projectscout@seniorscouncil.org), or in person at those sites that help with appointments\*.

8.4-1

## **Ad-Hoc Events in February\***

1. Tacos and taxes in partnership with Golden State Opportunity (GSO), Watsonville Public Library, and Robert Rivas's Office.
2. La Posada Senior Retirement Community Santa Cruz
3. Garfield Park Village Senior Housing Santa Cru

## **Project SCOUT February Tax Production Totals**

### **Project SCOUT Volunteer Income Tax Assistance Tax Preparation Totals:**

- Number of Federal returns prepared – 529
- Primary or secondary 60 years old or older – 272
- Average income of those serviced – \$28,788.00
- Dollar Amount of Federal refunds including credits – \$649,203.00
- Dollar Amount of State refunds including credits – \$139,056.00

Dollar Amount of TOTAL refunds – **\$788,259.00**

Total money back in the wallets of our clients, including average return cost of \$240.00 – **\$915,219.00!**

## **Calfresh Services**

Calfresh services for seniors and disabled are offered to those requesting the service during tax season. Outreach will be performed starting in May.

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

8.4-2

## **February 2026 Recap**

### **Challenges:**

With the delayed start to volunteer training and certification resulting from IRS training delays and supply shortages, we had to postpone the start of a few sites by a week due to volunteers not being fully ready and certified taking into account all the changes with tax law this year.

We are seeing immigrant populations face anxiety and deferring from filing taxes or applying for programs such as CalFresh, leaving refunds and resources available to them unclaimed.

We are seeing some of our sites having appointment slots going unfilled either because taxpayers are not aware of the site taking walk-ins or on-site appointments, or that our office is not being able to meet all the phone requests. We hope to get more volunteer assistance in March to remedy this.

### **Best Practices:**

Project SCOUT's reach and supports are expanding. This year we have 39 certified volunteers, which is the largest pool of volunteers ever! This brings its own "issues" such as having more appointments to fill or having more reporting and paperwork for each. This of course is a great problem to have, and we are keeping all those volunteers involved both at our offices and at our sites.

We have officially launched our second site in San Benito County at the San Juan Bautista Library, and although we are not getting many requests yet at this site, with time and word of mouth we expect to be able to at least do 50 tax returns by the end of the tax year.

Besides our 15 sites running services, we have had some successful ad-hoc events such as Tacos & Taxes in partnership with the Office of the Speaker of the House Robert Rivas, GSO, who is one of our biggest funders and brains behind "Tacos & Taxes", as well as the valuable help and support from the Watsonville Public Library and city, both allowing us to make this event happen in two weeks notice! It became clear that the site initially picked in Hollister (Pauline Valdivia Memorial Center) would not work out due to logistics and permit difficulties. At the Watsonville Public Library on Friday February 27th we assisted 41 people with tax return preparation, and about 75 people total with tax related questions, appointments, and of course, free tacos! It was an exciting event that we calculate garnered at least \$60,000.00 total for those serviced that day.





Del Mar Caregiver  
Resource Center



# CAREGIVER UNIVERSITY CONFERENCE

Gain practical tools, connect with fellow caregivers, and find the support you need as you navigate caregiving transitions.

## Your Day of Learning, Connection & Inspiration

- ✓ **Free Registration** – Join us at no cost.
- ✓ **Exclusive Swag** – First 50 attendees get a free conference T-shirt.
- ✓ **Resource Fair** – Discover tools, services, and caregiver support.
- ✓ **Breakout Sessions** – Choose sessions that fit your interests.
- ✓ **Connect & Recharge** – Meet fellow caregivers and build community.

**REGISTER FOR FREE TODAY!**



**April 18, 2026**

9:00 A.M. - 3:00 P.M.



**R.O. Hardin Elementary School**

881 Line St, Hollister, CA 95023

*Spanish interpretation available*



Scan the QR code or visit

<https://bit.ly/3ZTcDRJ>

9.1-1





# Timeline of Federal and State Funding Cuts to Medi-Cal and CalFresh in California

| Impact Date      | Program  | Federal/State  | Policy Change  | Scope of Impact  | Primary Impact        |
|------------------|----------|----------------|--|--|-----------------------|
| July 4, 2025     | CalFresh | Federal Policy | Restricts internet expenses as allowable deductions for grant calculations | All CalFresh recipients  | Reduces Benefits      |
| October 1, 2025  | CalFresh | Federal Policy | Restricts adjustment of the Thrifty Food Plan (TFP)                        | All CalFresh recipients, with most immediate impact on very large households         | Reduces Benefits      |
| October 1, 2025  | CalFresh | Federal Policy | Eliminates the SNAP-Ed program   | CalFresh-funded nutrition education and obesity prevention programs                  | Reduces Program Scope |
| November 1, 2025 | CalFresh | Federal Policy | Limits the use of the Standard Utility Allowance (SUA)                     | CalFresh households that do not include a member over age 60 or who has a disability | Reduces Benefits      |

|                         |          |                |  |   |                      |
|-------------------------|----------|----------------|--|---|----------------------|
| <b>February 1, 2026</b> | CalFresh | Federal Policy | Restricts time limit waivers to areas with unemployment rates over 10%                                 | All able-bodied adults without dependents, including newly subject populations who were previously exempted   | Reduces Access       |
| <b>April 1, 2026</b>    | CalFresh | Federal Policy | Eliminates CalFresh food assistance for many lawfully present immigrants                               | About 74,000 refugees, asylees, humanitarian parolees, trafficking survivors, and other immigrants previously eligible under humanitarian protections | Reduces Access       |
| <b>June 1, 2026</b>     | CalFresh | Federal Policy | Expands restrictive time limits to additional CalFresh enrollees                                       | Caretakers of children 14 and older, older adults, former foster youth, veterans, and people experiencing homelessness previously exempt              | Reduces Access       |
| <b>October 1, 2026</b>  | CalFresh | Federal Policy | Reduces the federal contribution to annual CalFresh administrative costs and shifts the cost to states | California state budget   | Direct Budget Impact |

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|                        |          |                |  |  |                       |
|------------------------|----------|----------------|--|--|-----------------------|
| <b>October 1, 2027</b> | CalFresh | Federal Policy | Requires California to pay a portion of CalFresh monthly benefits *                          | California state budget  | Direct Budget Impact  |
| <b>July 4, 2025</b>    | Medi-Cal | Federal Policy | Lowers cap on State-Directed Payments (SDPs)   | Hospitals and clinics statewide  | Reduces Program Scope |
| <b>July 4, 2025</b>    | Medi-Cal | Federal Policy | Defunds providers offering abortion services   | Planned Parenthood and similar providers   | Reduces Access        |
| <b>July 4, 2025</b>    | Medi-Cal | Federal Policy | Blocks federal rule to improve access to Medi-Cal  | Children, seniors, and people with disabilities  | Reduces Access        |
| <b>January 1, 2026</b> | Medi-Cal | State Policy   | Ends coverage for GLP-1 drugs for weight loss  | All Medi-Cal recipients  | Reduces Benefits      |
| <b>January 1, 2026</b> | Medi-Cal | State Policy   | Freezes new Medi-Cal enrollment for undocumented adults                                      | Undocumented adults ages 19 - 64   | Reduces Access        |
| <b>January 1, 2026</b> | Medi-Cal | State Policy   | Reinstates Medi-Cal asset limits - \$130,000 limit for individuals and \$195,000 for couples | Older adults age 65 and older, people with disabilities, and long-term care recipients   | Reduces Access        |
| <b>July 1, 2026</b>    | Medi-Cal | State Policy   | Cuts funding for Federally Qualified Health Centers (FQHCs) and rural health clinics         | Clinics providing services to undocumented adults and certain other groups of immigrants | Reduces Access        |

|                        |          |                |  |  |                      |
|------------------------|----------|----------------|--|--|----------------------|
| <b>July 1, 2026</b>    | Medi-Cal | State Policy   | Eliminates Medi-Cal dental benefits for certain groups of immigrants                   | Undocumented adults and certain other groups of immigrants   | Reduces Access       |
| <b>October 1, 2026</b> | Medi-Cal | Federal Policy | Reduces federal match for emergency Medi-Cal   | California state budget  | Direct Budget Impact |
| <b>October 1, 2026</b> | Medi-Cal | Federal Policy | Eliminates Medi-Cal and CHIP (Children's Health Insurance Program) for many immigrants | About 200,000 refugees, asylees, humanitarian parolees, trafficking survivors, and other immigrants previously eligible under humanitarian protections | Reduces Access       |
| <b>January 1, 2027</b> | Medi-Cal | Federal Policy | Introduces new restrictions on provider tax rates                                      | Entire Medi-Cal program  | Direct Budget Impact |
| <b>January 1, 2027</b> | Medi-Cal | Federal Policy | Increases eligibility checks for the Affordable Care Act (ACA) expansion adults        | About 400,000 adults could lose Medi-Cal   | Reduces Access       |
| <b>January 1, 2027</b> | Medi-Cal | Federal Policy | Limits Medi-Cal retroactive coverage for adults  | About 86,000 people per year would receive 1 month of retroactive coverage instead of 3 months   | Reduces Access       |

9.2-4

|                        |          |                |  |   |                      |
|------------------------|----------|----------------|--|---|----------------------|
| <b>January 1, 2027</b> | Medi-Cal | Federal Policy | Institutes work reporting requirements for ACA expansion adults          | About 1.4 million adults could lose Medi-Cal                          | Reduces Access       |
| <b>July 1, 2027</b>    | Medi-Cal | State Policy   | Imposes a \$30 monthly Medi-Cal premium for certain groups of immigrants | Undocumented adults and certain other groups of immigrants ages 19-59 | Reduces Access       |
| <b>October 1, 2027</b> | Medi-Cal | Federal Policy | Lowers the allowable provider tax rate                                   | Entire Medi-Cal program   | Direct Budget Impact |
| <b>October 1, 2028</b> | Medi-Cal | Federal Policy | Imposes mandatory cost-sharing for ACA expansion adults >100% FPL        | Low-income adults   | Reduces Access       |
| <b>October 1, 2028</b> | Medi-Cal | Federal Policy | Implements new managed care provider payment limits<br>**                | Entire Medi-Cal program   | Direct Budget Impact |

\* Assuming the state complies with this **unfunded mandate**, this will require California to use General Fund dollars to pay up to 15% of total CalFresh benefits, previously fully funded by the federal government. If the state doesn't cover the cost of this portion of benefits, it will have to opt out of the program altogether, eliminating billions of dollars in annual federal food assistance and ending CalFresh as we know it.

\*\* Assuming that this cap will contribute to a reduction in the Hospital Quality Assurance Fee, which would then increase state General Fund costs to backfill a portion of the lost revenue.





BEHIND THE HEADLINES

# How Massive Federal Cuts Will Create Unprecedented Challenges for Medi-Cal Patients and Providers

By Dawn Joyce

Published October 03, 2025

6 MINUTE READ • [HEALTH CARE COSTS/AFFORDABILITY](#) • [HEALTH INSURANCE COVERAGE](#) • [MEDI-CAL](#)



When Congress celebrated July 4 by enacting House Resolution 1 (known as H.R. 1 or the “One Big Beautiful Bill Act”), experts warned of massive impacts on Medicaid <<https://health-access.org/the-state-of-health-care-coverage/>> programs nationwide and the more than 70 million people who rely on them.

H.R. 1 cut nearly \$1 trillion from Medicaid, the largest funding reduction in the program's 60-year history. The nonpartisan Congressional Budget Office estimates that by 2034, as many as 10 million [individuals nationwide](https://www.cbo.gov/system/files/2025-08/61367-uninsured-data.xlsx) will become uninsured as numerous new eligibility rules are imposed in Medicaid and ACA programs.

## How Will H.R. 1 Affect Californians?

The Medicaid program, known as Medi-Cal in California, covers more than half of the state's children, 2.2 million seniors and people with disabilities, 1 in 5 working Californians, and millions of other people with low incomes. H.R. 1 is expected to cut \$30 billion a year in federal funding from Medi-Cal [reducing overall access to care](https://calbudgetcenter.org/resources/how-federal-funding-cuts-threaten-the-health-of-californians/) and possibly pushing some safety net providers into dire straits, according to the California Budget and Policy Center. Up to 3.4 million state residents could lose coverage, the center said. As the uninsured population rises, more medical bills will go unpaid, cutting revenue for California's health care safety net.

H.R. 1 makes it more difficult for the state to pick up the slack. With decreased federal funding, increased administrative costs, and less flexibility to generate revenue and draw federal matching funds, California will have fewer options for financing the state share of Medi-Cal. The California Medical Association called it "a direct attack on California's health care system" that will have "catastrophic" effects.

Here are key challenges that H.R. 1 will create for the Medi-Cal system:

## Funding for Hospitals and Providers

- **Hospitals will see lower reimbursement rates.** California has been using the flexibility of state-directed payments to enhance payments for both public [and private](https://www.dhcs.ca.gov/services/pages/dp-dph-epp.aspx) [hospitals](https://www.dhcs.ca.gov/services/pages/dp-phdp.aspx). H.R. 1 gradually phases in reduced rates, eventually

9.3-2

capping them at Medicare levels, which on average are much lower than commercial rates. The financial stability of hospitals statewide could be jeopardized.

- **Providers will see lower payment rates.** H.R. 1 will cap the funds that states use to close the gap between Medicaid reimbursement rates and rates paid by other insurers. Currently, states can direct managed care organizations to pay providers the average rate paid by commercial insurance. Beginning in 2028, those rates will edge downward toward substantially lower Medicare levels.
- **Rural hospitals, which serve areas already burdened by severe provider shortages, will be at higher risk of closure.** In an attempt to cushion H.R. 1's negative impact on rural providers, Congress created a \$50 billion Rural Health Transformation Fund. The fund will allocate \$10 billion to rural providers nationwide each year through 2030. But it will only offset about one-third of the \$137 billion in cuts [faced by rural health systems](https://www.kff.org/medicaid/issue-brief/a-closer-look-at-the-50-billion-rural-health-fund-in-the-new-reconciliation-law/), according to a KFF policy brief. Since many rural providers are already in precarious financial condition, this funding is unlikely to adequately mitigate challenges to rural health systems in California.
- **Tax restrictions will block California's ability to fund Medi-Cal.** H.R. 1 creates a limitation on various provider taxes <https://www.congress.gov/crs-product/rs22843>, which California uses to finance much of the state's share of Medi-Cal and to draw federal matching funds. Two of those levies, the managed care organization tax <https://www.dhcs.ca.gov/services/pages/mco-tax.aspx> and the hospital quality assurance fee <https://www.dhcs.ca.gov/provgovpart/pages/hqaf.aspx#:~:text=the%20program%20provides%20funding%20for, costs%20of%20administering%20the%20program.>>, generate billions of dollars annually. By freezing current tax rates and requiring California to gradually reduce rates from 6% to 3.5% beginning in 2028, the state stands to lose a key funding stream.

## Barriers to Enrollment

- **Many Medi-Cal enrollees will face new work requirements.** For the first time in Medi-Cal's history, some enrollees must complete 80 hours per month of "community engagement," which can be satisfied by employment, job training, education, or volunteer activities. Experts say the paperwork burden will lead to eligible people being denied enrollment.
- **Medi-Cal enrollees will have to renew eligibility more frequently.** Enrollees currently are required to renew no more than once every 12 months. Starting in January 2027, H.R. 1 requires people to prove their Medi-Cal eligibility every six months.
- **Protections to prevent disenrollment of eligible people will no longer be mandatory.** H.R. 1 immediately converts prior mandatory protections adopted by the previous administration to streamline Medicaid enrollment and renewal processes into optional ones. California may choose to continue using those protective approaches, but they will remain optional for 10 years.
- **Some immigrant populations and other groups will lose Medi-Cal eligibility.** Some immigrants lawfully living in California, including victims of human trafficking and domestic violence, will lose Medi-Cal eligibility starting Oct. 1, 2026. They will retain eligibility only for emergency Medi-Cal benefits and lose benefits for preventive care, primary care, specialty care, and other nonemergency medical services.

## Unprecedented Costs for Patients

- **Enrollees must pay a higher share of health care costs.** Starting in October 2028, H.R. 1 will require patients to make up to \$35 copayments per service if they are among the nearly five million Californians who gained Medi-Cal coverage through Medicaid expansion provisions in the Affordable Care Act. The rule does not apply to care provided at federally qualified health centers, behavioral health centers, or rural health clinics,

and fees won't be imposed for primary care, prenatal, pediatric, mental health, and substance-use treatment services.

- **Retroactive Medi-Cal coverage will be reduced, putting patients at risk of medical debt.** Starting in 2027, retroactive coverage for services that preceded a successful application for Medi-Cal benefits will be reduced from three months to two months for most enrollees and to just one month for Medicaid expansion enrollees. More people with low incomes will take on unaffordable medical debt. Doctors and hospitals will provide more uncompensated care.

## Quality of Care

H.R. 1 blocked California from enforcing new state rules raising nursing home staffing levels. The state's minimum staffing ratio will be frozen at current lower levels through 2034.

## Authors & Contributors



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Senior Vice President, Impact Health Policy Partners

Dawn Joyce is senior vice president and health policy expert with Impact Health Policy Partners. She has hands-on experience at the federal, state, and local levels, and previously served on the staff of the late US Sen. Dianne Feinstein of California.

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9.3-4



REPRESENTING SENATE DISTRICT 17

## PRESS RELEASE

# Senator Laird Introduces SB 1261 To Protect Critical Services For Older Adults And People With Disabilities In San Luis Obispo County And The Central Coast

FEBRUARY 23, 2026

**SACRAMENTO** – State Senator John Laird (D-Santa Cruz) announced the introduction of Senate Bill 1261, which will ensure that the Aging and Disability Resource Connection (ADRC) serving San Luis Obispo, Santa Barbara, and Ventura counties can continue operating during a major transition affecting regional aging services.

“Older adults, people with disabilities, and their caregivers rely on the ADRC as a trusted place to turn for help,” said Laird. “We cannot allow services to disappear simply because of an administrative transition. This legislation keeps the doors open and ensures no one falls through the cracks.”

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An ADRC is a local, community-based hub that helps older adults and people with disabilities find and access the

9.4-1



long-term services and supports. This is often called a “No Wrong Door” approach, meaning no matter where someone asks for help, they can get connected to the right services without being passed from office to office.

Currently, the Area Agency on Aging (AAA) that serves Santa Barbara and San Luis Obispo Counties (Planning and Service Area 17) is being redesignated. At the same time, Ventura County (Planning and Service Area 18) is stepping down from its role as an AAA. Because ADRCs are required by law to operate in partnership with an AAA, this change would force the local ADRC to close – even though community members still depend on its services every day.

Laird’s legislation would allow the ADRC to temporarily operate independently for at least one year and up to two years during this transition period. Without this bill, the ADRC serving San Luis Obispo County would have to shut down.

Across California, 31 of 58 counties are served by an ADRC. In 2024 alone, nearly 170,000 older adults and people with disabilities received help through California’s ADRC network.

Services include:

- One-on-one help connecting people to healthcare, in-home care, meals, transportation, and other community services;
- Guidance for individuals and families making decisions about long-term care; and,
- Short-term coordination and transition services to help people remain safely in their homes.



- Older adults seeking aging-related services;
- Adults with disabilities navigating long-term services and supports;
- Individuals at risk of being placed in institutions who want to remain at home; and,
- Caregivers supporting loved ones in the community.

The legislation is sponsored by the California Association of Area Agencies on Aging (C4A), which represents 31 AAAs across the state, and supported by the California Foundation for Independent Living Centers (CFILC), the statewide membership association for Independent Living Centers serving 56 counties. Both organizations maintain that ADRCs are a key part of California's Master Plan for Aging and help ensure people can live with dignity and independence in their own communities.

"ADRC is a critical part of our local safety net, ensuring that older adults and people with disabilities can access services through a trusted 'No Wrong Door' approach," said Jennifer Griffin, Executive Director of Access Central Coast and Chair of California Foundation for Independent Living Centers. "By simplifying how older adults and people with disabilities connect to supports, ADRCs have reduced isolation and expanded opportunities for independence in the community. Access Central Coast is proud to serve as a core ADRC partner, working every day to ensure that people can navigate complex systems with dignity, clarity, and confidence."

"As California prepares for the significant growth in our older adult population, C4A remains committed to ensuring the



REPRESENTING SENATE DISTRICT 17

Association of Area Agencies on Aging. "In partnership with the California Foundation for Independent Living Centers, we are committed to expanding 'No Wrong Door' systems through ADRCs that truly function as one-stop shops for individuals and families seeking long-term services and supports. We applaud Senator Laird for his leadership in supporting the continuation of ADRCs and for strengthening California's commitment to coordinated, person-centered care."

"This bill is a practical, common-sense solution," said Laird, whose office holds an official seat on San Luis Obispo County's Adult Services Policy Council. "It simply allows time for a smooth transition so essential services can continue uninterrupted."



Lois Sones has guided Elderday Adult Day Health Care through many successful efforts in her 13 years at the helm of the Community Bridges program, including opening the new state-of-the-art headquarters in 2023. Credit: Community Bridges

PROMOTED CONTENT 

## The music still plays at Elderday: Lois Sones and the art of keeping people home



PROMOTED BY COMMUNITY BRIDGES  
February 24, 2026

9.5-1

On any given weekday morning at Elderday Adult Day Health Care, a Lift Line bus pulls up, and participants step down slowly, greeted by name.

Inside, nurses check vitals and medications, and a social worker confers quietly with a family member. Later, there will be movement therapy, music, cognitive exercises, art, nutritious meals, and deep conversation. Someone will sing. Someone will laugh unexpectedly. A caregiver back at home who hasn't slept well in months will exhale, knowing their loved one is safe for the day.

Elderday is Community Bridges' Community-Based Adult Services (CBAS) program and our counties only such programs. It blends skilled nursing care, therapeutic and social activities, nutritious meals, free transportation, and one-on-one care planning to make sure each person gets the right support. It also provides something less measurable but just as essential: respite for family caregivers and dignity for older adults who want to remain at home.



Lois Sones gives much of the credit to Elderday Adult Day Health Care's family success stories to her dedicated staff, many of whom have been with the program for more than a decade. Credit: Community Bridges

For nearly 13 years, Lois Sones has stood at the center of that daily choreography.

Under her leadership, Elderday has done what it was designed to do: keep people as well as possible for as long as possible. Elderday prevents unnecessary hospitalizations and early institutionalization, maintains people in their home and keeps people safe while helping to reduce caregiver depression and extend the time families can care for loved ones at home. It also offers structure, stimulation, and belonging to people living with dementia and those with complex medical conditions.

“Lois embodies the spirit of true collaboration and resilience. Together, we sustained this program following the Salud closure, the uncertainty of 2018, the Covid pandemic in 2020 and the ongoing challenges that followed—finding creative paths to keep doors open through reduced rent, thoughtful stewardship, and an

unwavering commitment to those we serve,” said Community Bridges CEO Raymon Cancino. “Her willingness to grow, and partner in problem-solving has helped ensure this program not only endured but continues moving toward long-term sustainability for the older adults and our community who rely on it.”

But if you ask Lois what matters most, she will not start with metrics.

She will talk about singing.

“It’s an honor,” she says, “to be part of someone’s life journey—to learn their stories.”

As she prepares to retire in May, Lois leaves behind not just a program that works, but a philosophy of care rooted in curiosity, respect, and a lifelong belief that community is health.

## **Where Community Took Root**

Lois grew up in East Los Angeles in a culturally mixed, vibrant neighborhood that shaped her before she knew it was shaping her.

She attended Buddhist temples with Japanese neighbors. She spent time in Jewish spaces. She accompanied Mexican friends to Catholic services. Difference was not something to fear or debate; it was simply life.

“It gave me such appreciation,” she recalls, “for different cultures, religions, ways of being in the world.”

In junior high, her family moved to a more suburban area of Los Angeles. The shift was stark. Her high school, as she recalls, had only one Black student. The diversity that had once felt natural was suddenly absent. Community, she realized, could disappear.

That early contrast planted something enduring: an awareness that belonging is both powerful and fragile and something that requires curation and willingness to work on.

She carried that awareness to UC Santa Cruz in the late 1960s, where she enrolled in Community Studies during a period of social upheaval and intellectual energy. Though initially unsure of her path, she found herself drawn to how people thrive or falter within systems.

Financial realities forced her to leave before completing her degree, but the questions she was asking about environment, identity, and support would return to define her life’s work.

9.5-4

## **From Hospital Corridors to Respite Weekends**

Lois' professional life began, improbably, with a one-day temporary typing job at Children's Hospital in Stanford.

She stayed—on and off—for 13 years.

She began as a secretary. Because she spoke Spanish—learned through family immersion and travel in Central America and deepened through years connected to Nicaraguan culture—she was soon asked to interpret. She became Children's Hospital at Stanford's first Spanish interpreter, bridging conversations between doctors and families navigating frightening diagnoses.

It was in those hospital corridors that Lois discovered social work.

She saw that medicine treated disease, but social workers treated the context: housing instability, family strain, fear, language barriers, grief. She returned to school at night to finish her bachelor's degree at San José State, then earned her Master's in Social Welfare at UC Berkeley, eventually completing her clinical licensure (LCSW).

Her career included work at Santa Clara Valley Medical Center and Stanford Children's Hospital, including pediatric oncology with children facing leukemia and lymphoma, maternal and child health, adults with spinal cord injury, HIV, and dialysis care. The work was intense and emotionally exacting—for both her and her patients.

She later joined Del Mar Caregiver Resource Center as a family consultant, where her focus shifted to older adults and the family members caring for them. There, she began to grasp the invisible strain carried by caregivers, especially those supporting loved ones with dementia.



Lois Sones dedicated the main activities room in the program's new headquarters to former Elderday Adult Day Health Care founder and director Majel Jordan, pictured right, whom she considered a key mentor. Credit: Community Bridges

Working alongside Elderday's founder, Majel Jordan, Lois helped develop "Respite Weekends," twice-yearly programs where individuals with dementia were cared for over an entire weekend so their families could rest.

Those weekends were revelatory.

Caregivers arrived depleted. They left steadier, sometimes tearful with relief. Participants were not parked in chairs; they were engaged—singing, moving, reconnecting.

Lois remembers one husband who longed simply to hear his wife's voice again. When a beloved song played, the woman began to sing. In that moment, Lois saw what she would come to believe deeply: dementia may alter memory, but it does not erase humanity.

After taking time to stay home during her daughter's early years and helping start the family winery, Sones Cellars, Lois received encouragement from then-interim Elderday director Cheryl Bentley to apply for the

program's leadership role.

That was nearly 13 years ago.

She thought she might stay for three.

## **Why She Stayed — And Why It Matters Who Comes Next**

In adult day services, care unfolds over time.

Elderday allows staff to truly know participants and families. You learn who they were before diagnosis. You meet the retired teacher, the farmworker, the engineer, the mother who still remembers every lyric to a song from 1965.

You see them dance. You see them thrive.

That continuity builds trust. It strengthens families. It stabilizes households that might otherwise unravel under the strain of caregiving. It gives underrepresented families access to high-quality, community-based care that honors culture, history, and dignity.

Lois did not just lead within these walls. She advocated across the field, serving for many years on the board of the California Association for Adult Day Services (CAADS) and as a commissioner for both the Santa Cruz County Seniors Commission and the In-Home Supportive Services Advisory Commission. She championed the adult day health model of care that keeps people home and strengthens the broader safety net for older adults statewide.



Elderday Adult Day Health Care is more than just a care center. The dedicated team at Elderday keeps participants nourished, healthy, engaged and having fun with a variety of activities such as the Elderday Olympics. Credit: Community Bridges

She believes fiercely that institutional care should not be the default, and that place and space can heal the soul.

Leading this program requires skill, steadiness, and heart. It calls for someone who values dignity over expediency, prevention over crisis response, and relationship over transaction. It is demanding work, but for the right person, it is also deeply fulfilling.

“It’s hard,” Lois says plainly. “But if being moved by human connection matters to you, it’s incredibly rewarding.”

Now, as she prepares for her next chapter, Elderday’s mission continues. The buses will still arrive each morning. The nurses will check in. The music will still play.

9.5-8

The opportunity ahead is clear: steward a program that keeps local families intact, supports older adults to remain in their homes, honors elders with compassion and respect, and strengthens the fabric of the Central Coast every single day.

And for someone who shares Lois' values, there may be no more meaningful work.



## COMMUNITY BRIDGES PUENTES DE LA COMUNIDAD

### MORE FROM COMMUNITY BRIDGES



PROMOTED CONTENT

**Fifty years at the doorstep: Why Meals on Wheels matters more than ever—and how you can help**



Promoted by Community Bridges

January 14, 2026



**NONPROFITS**

# Jovenes De Antano, former director settle lawsuit

*Terms of agreement not disclosed*

by **Noe Magaña**

March 4, 2026



Former Jovenes de Antano executive director Danny Barrera speaking during a May 2025 Hollister city council meeting. Photo by Noe Magaña.

9.6-1

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

**Jovenes De Antano's former executive** director Danny Barrera withdrew his lawsuit against the Hollister nonprofit after reaching a settlement regarding his claim of wrongful termination.

The court documents do not include the terms of the settlement. Jovenes De Antano board president Tami Cook-Erickson said she could not provide the terms but the nonprofit opted to settle rather than go to trial because of costs.

“It would cost us about \$220,000 to go to trial and we don't have the money,” she said. “The cost of the trial was prohibitive so we had to settle. It's the case for all the people dealing with this within the state of California.”

Cook-Erickson said the nonprofit sold their last two vans to pay the settlement and that no donor funds were used.

Barrera's attorney Joshua White did not respond to multiple calls for comment.

According to court documents, the notice of settlement was filed with San Benito County Superior Court on Feb. 5 and the request for dismissal on Feb. 13. The dismissal, a condition of the settlement, was entered with prejudice, meaning Barrera cannot sue under the same allegations.

In his lawsuit, filed in October 2025, Barrera alleged the nonprofit violated several labor laws including discrimination and breach of contract. He requested an unspecified amount in damages, unpaid wages and civil penalties.

Cook-Erickson denied the allegations and said Barrera, along with 14 other employees were laid off in June 2025 after the organization lost two key contracts to provide senior services including meals and transportation after decades of doing so.

Barrera joined Jovenes De Antano in December 2023, filling the vacancy left by co-founder Pauline Valdivia following her death in September 2022. She had headed the organization since 1975.

Former Jovenes Associate Director Connie Padron previously told BenitoLink the nonprofit had interviewed more than 20 applicants before selecting Barrera.

9.6-2

OPINION FROM COMMUNITY VOICES

## *Village Santa Cruz County offers connection and support for older adults – want to join us?*

BY MARY HOWE

March 8, 2026



A group of Village Santa Cruz County meet up at The Abbey coffeehouse on the Westside. Credit: Mary Howe

### **Quick Take**

Mary Howe, co-founder of Village Santa Cruz County, responds to a recent Lookout op-ed about making female friends after 50 by highlighting the nonprofit's work to combat loneliness among older adults. Founded in 2017, the membership-based group connects

9.7-1

seniors through small social gatherings, educational programs and volunteer support in navigating life's crises and remaining independent longer. The organization is part of the national Village to Village Network movement and currently serves more than 70 members locally. A public workshop on planning for medical crises will be held May 18 at the Aptos Branch Library.

*Have something to say? Lookout welcomes letters to the editor, within our policies, from readers. Guidelines [here](#).*

I am writing in response to [Lida Berliner's recent Lookout op-ed](#) about finding female friends over 50. I want to tell Lida and other older adults who are looking for friendships about the nonprofit [Village Santa Cruz County](#) (VSCC), which exists to help people form close relationships as they age.

The idea is not only to build a friendship circle, but also to support each other as we face and adjust to getting older.

Lida, Village member Mary Koehring, from the San Lorenzo Valley, knows just how you feel about finding friendship post-retirement. "After years of long working hours and commuting, I realized I had not only retired from my job, but also from my daily social group," she said. "I felt quite isolated. Village Santa Cruz was so welcoming to me as I faced the challenge that came with my new stage of life. I found a circle of folks who share the joy of making new friends, helping others learn ways to celebrate, or cope with, change and aging, and also appreciate that we all come with our own stories."

I co-founded VSCC in 2017 as a grassroots network of peer support for aging well. It is not a physical place. It is a membership organization, modeled on the [national "villages" movement](#) that connects more than 300 independent villages through Village to Village Network, Inc.

The 50 Villages in California collaborate through membership in [Village Movement California](#). Village Santa Cruz County is self-sustaining, with a sliding scale fee to ensure accessibility for individuals with limited economic resources. **Annual membership is \$300 or \$25 per month. Sliding scale is \$5 to \$20 per month.**

I retired from UC Santa Cruz in 2014 as an electronics technician for the chemistry department. During my years at UCSC, I was involved in my union, University Professional and Technical Employees (UPTe). That's where I learned the importance of collective support during difficult situations.

9.7-2



Credit: Via Mary Howe

I see Village Santa Cruz filling a somewhat similar role for older adults.

When I retired and wanted to start volunteering, I wanted to focus on aging, to learn how to age well. I found out through the **Seniors Council** that since 2010, the population of people aged 65 to 84 has grown faster (80.9%) in Santa Cruz County than anywhere else in California. In 2024, there were 74,495 seniors living in our county, with 1 in 5 older people living alone.

Many of these folks are lonely.

Before VSCC, my volunteer work included leading a crafting program at Elderday Day Health Care and as an ombudsman for long-term care facilities. I saw that although surrounded by others, residents of long-term care facilities can feel abandoned. I was happy to see volunteers from **I-You Venture** visiting with residents.

Feeling alone isn't just an issue in long-term care facilities. Family/friendship loss through out-of-town moves, death, retirement and health, mobility or vision issues can isolate us. Study after study has shown an increased risk to one's health associated with loneliness and isolation.

I helped found Village Santa Cruz County to connect older adults with one another. We focus on three main areas: relationship-building social activities, education about issues affecting older adults, and volunteer support. We help people live at home longer and have more agency over their lives.



Village Santa Cruz County members dining with members of other California Villages following a conference. Credit: Via Mary Howe

We typically have four to six small group **events** each week. For me, I have small circles within the 70-plus current members whom I see in my meetups and interest groups. These are the people I feel most comfortable asking for support, the first members I tend to ask for help.

Village member Alice Rink recently wrote to me about her experience: "I had knee replacement surgery. I am so grateful to my Village friends for all the help they provided: the loan of equipment, delicious meals, rides to and from appointments and the hospital, and help with my dog. And more than anything, friendly and delightful companionship which kept my spirits uplifted."

We learn from each other, informally sharing information on anything from medical doctors who take new Medicare patients to a good handyman to advice on gardening. VSCC organizes presentations by experts in a particular field. These are often open to the public.

This year, in partnership with the Aptos Branch Library, we will host a May 18 workshop offering tips on how to plan for a sudden medical crisis or slow decline due to dementia, a Parkinson's or other diagnosis that can leave us unmoored. In VSCC and in my family, I have witnessed people's decline made easier or harder depending on how well the person had their affairs in order and had made the information easily available to their loved ones.

My mother, bless her, planned well, including decluttering, designating power of attorney and writing detailed instructions. Before and after her death at age 96, we could focus on her and not waste time searching for needed paperwork and deciding what to do with a house full of stuff. One of my sisters passed away suddenly

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and unexpectedly. Things we wanted to ask her, from “What is your phone password? We need your contacts so we can let your friends know you died,” to more personal details of her life, were left unanswered forever.

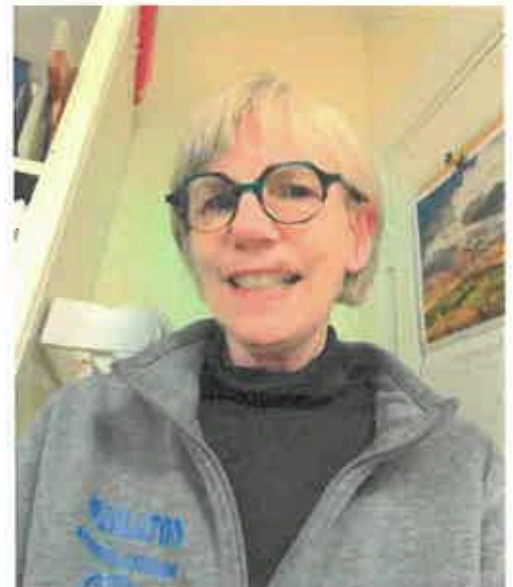
Sometimes it is hard to ask for help. But I have found it a beneficial skill. It benefits the asker, provides purpose to volunteers and encourages others to seek support. We need to normalize asking for the help we need.

My favorite social activity with Village Santa Cruz is listening to people’s life stories revealed bit by bit. Right now, I often offer rides for those who can’t drive (temporarily or permanently), but my most-loved way to help out is visiting with members who are homebound. This one-on-one connection is a gift to us both.

I have family in town and am healthy at this point in my life. With three sisters in Santa Cruz, and my loving spouse, Don Lane (a former Santa Cruz mayor), I imagined myself set for my oldest elderhood years. But when two of my Santa Cruz sisters passed away, the need for VSCC hit home.

I made a commitment to continue this work until I turned 70. I’m now 71 and not stopping. I love the work too much.

I am hoping Village Santa Cruz will expand in the future to a more intergenerational organization, ensuring that there will be folks to help me when I reach the grand status of an older elder. No matter our age, we all need a supportive friendship network. Come spend some time with us and see if we are a good fit for you. Write to [info@villagesantacruz.org](mailto:info@villagesantacruz.org) with any questions.



Mary Howe. Credit: Mary Howe

Aging doesn’t have to be lonely.

*Mary Howe is a retired electronics technician in the chemistry department at UC Santa Cruz. She is married to former Santa Cruz mayor Don Lane. She helped found Village Santa Cruz County and is the current board chair.*