



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, April 16, 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/u/kcITMKXHq5>

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 March 2026 Board Meeting
- 10:15 6. Committee Reports
- A. Finance Committee
 - a. Agency-wide Profit & Loss
 - b. Adoption of Audit Clearinghouse Policy

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

SUPPORTED BY FEDERAL, STATE & LOCAL GOVERNMENTS, FOUNDATIONS, THE UNITED WAYS OF
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
- D. Nominating & Board Development
- E. Resource Development Committee - **New**

- 11:15 7. 2024-28 Area Plan Update
- 11:25 8. Executive Director's Report
 - A. Budget Shortfalls
 - B. Agency Operations
 - C. SB 1249 & CDA's 2030 Plan
 - D. Master Plan for Aging Local Playbooks
- 11:35 9. Program Reports (written)
 - A. Foster Grandparent/Senior Companion Program
 - B. Aging & Disability Resource Connection (ADRC)
 - C. Volunteer Coordination Project
 - D. Project SCOUT
- 11:50 10. Miscellaneous Correspondence & Other Items
Location of May Meeting?
- 12 Noon 11. Adjourn

Next Meeting:

*10 am to 12 Noon
Thursday May 21 , 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.



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

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

March 19, 2026

MINUTES

BOARD MEMBERS PRESENT:

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

BOARD MEMBERS EXCUSED:

Mickie Luna

STAFF PRESENT:

Clay Kempf (Executive Director); Hilary Minugh (Fiscal Specialist); Zach Johnson (Administrative Services Officer); Crystal Ortiz (ADRC); Britt Bassoni (ADRC)

OTHERS PRESENT:

Dana Wagner; Raymon Cancino

1. Welcome, Call to Order and Introductions

Tami Aviles called the meeting to order at 10:05 AM. Introductions were made.

2. Additions & Deletions to the Agenda

None.

3. Receive Announcements from Board Members

Wayne said that he Tami and Clay testified to SBC Board of Supervisors for additional nutrition funding in CDBG. Two more public hearings upcoming for those interested.

Antonio presented at Santa Cruz County Supervisors to increase funding for behavioral health. Clay noted that SCP is losing ~\$30K from recent cuts.

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

None.

5. CONSENT AGENDA

MOTION, RIVAS/SCHWICKERATH, to approve minutes of February 2026 Board Meeting. PASSED.

6. Committee Reports

1. Finance Committee – no report
2. Advocacy Committee:
 - a. State & Local Funding – Clay discussed CDA proposal to tie ADRC dissolution to AAA de-designation and reapplication process. CDA recently announced six-month continuation for ADRCs. Laird-sponsored SB 1261. Advisory Council will be writing letter of support, recommend Board does the same.
Clay noted that Ventura County has decided not to give up their AAA (yet).
Lisa proposed asking folks who have benefited from ADRC services to write letters to Laird thanking him.
Broad discussion of situation and possibilities.
Clay discussed CDA's proposal to add/increase funding to three Core service categories.
MOTION, ARNSBERGER/NORTON, to support SB 1261 and write letter in support; and continue to support budget augmentations for Seniors Council programs, including C4A's plan. **PASSED**.
 - b. Candidate Forums – upcoming for both Counties, more details TBD. ALTCC will co-sponsor SBC event.
 - c. California Senior Legislature Report – included in packet. Clay noted that its an election year and we have three candidates for two seats this time; new person has not returned paperwork yet.
Antonio reported there is a proposal to expand permanently affordable older adult housing through various means.
3. Executive Committee – covered in Advocacy discussion. Next RDC meeting April 7 @ 10AM, Board is invited.
MOTION, ARNSBERGER/McKENNEY, to approve proposed personnel policy update. **PASSED**.
Executive Director evaluation time, reminder to all members to complete the form.
4. Nominating & Board Development – Board elections this year, Tami working on that. More info TK. Executive Committee also up for renewal.
Discussion of Board training process, and request for bylaws to be added to website.
Lisa suggested Board members, especially new ones, visit senior centers, receive feedback.
Pam and team will look into extending Board terms to four years.

7. Executive Director's Report

1. Agency Operations –
2. SB 1249 & CDA's 2030 Plan – discussed previously. Clay noted that Assembly staff seem supportive.
3. Master Plan for Aging Local Playbooks –
4. Budget Shortfalls – detailed on 7.5, breakdown of funding needs and reserves; enough to cover losses this year but not indefinitely.
Lisa asked about direct community fundraising; has not been seriously pursued yet but option is open.
Lisa also raised concern that CDA is rarely attending C4A meetings; 2030 plan proceeding without input from service providers. Discussion of how to reshape CDA; strengthen CA Commission on Aging and restore oversight over CDA.
Dana has a contact with AARP, requested advocacy for senior nutrition programs.
Mary Lou said AARP increasing their levels of agitation as 'younger' seniors enter discussion.
Wayne requested updates on revenue raised during future RDC meetings.

Group discussed challenges, strategies; agreed that promoting combatting loneliness and isolation and meal programs has promise.

Broad discussion of Community Foundation relations. Lisa noted that SCCo CF chooses the minimum to distribute at every opportunity. Clay reported that Susan True may have a donor for FGP/SCP (does not include funds CF has been holding for a long time). CFs also offer endowment accounts which may help grow reserves, but importantly also makes SC 'part of the team'; group debated benefits & limitations.

8. Program Reports (written) –

1. *Foster Grandparent/Senior Companion Program*
2. *Aging & Disability Resource Connection (ADRC)*
3. *Volunteer Coordination Project*
4. *Project SCOUT*

9. Miscellaneous Correspondence & Other Items

Wayne reported that Don Larson, a strong SBCo ally, has passed, and group paid respects.

10. Adjourn

The meeting was adjourned at 12:05 PM

Next Meeting: April 16th, 10 a.m. – 12 Noon

Minutes prepared by: Zachary Johnson

Seniors Council of Santa Cruz and San Benito Counties

Agency Wide Budget vs. Actual

July 2025 through February 2026

	Jul '25 - Feb 26	YTD Budget	\$ Over Budget	Annual Budget
Ordinary Income/Expense				
Income				
PRIOR YEAR RELEASE FROM RESTRIC	25,000.00			
CFL				
Monitoring	0.00	0.00	0.00	0.00
Total CFL	0.00	0.00	0.00	0.00
GRANTS REC'D (Income)	3,411,861.35	3,052,816.00	359,045.35	4,475,452.45
LOCAL MATCH RECEIVED-JURIS.				
City of Capitola	5,000.00	5,000.00	0.00	5,000.00
City of Hollister	0.00	0.00	0.00	9,500.00
County of San Benito	0.00	0.00	0.00	33,665.26
County of Santa Cruz	83,312.92	81,333.36	1,979.56	154,750.00
LOCAL MATCH RECEIVED-JURIS. - Other	0.00			
Total LOCAL MATCH RECEIVED-JURIS.	88,312.92	86,333.36	1,979.56	202,915.26
LOCAL MATCH RECEIVED - OTHER				
FOUNDATIONS				
Newman's Own Foundation	10,000.00			
Golden State Opp Foundation	0.00	30,000.00	-30,000.00	30,000.00
NANCY BUCK RANSOM FOUNDATION	0.00	10,000.00	-10,000.00	10,000.00
SANTA CRUZ COMMUNITY CREDIT UNI	0.00	5,000.00	-5,000.00	5,000.00
COMMUNITY FOUNDATION - San Beni	34,100.00	13,750.00	20,350.00	42,800.00
HARDEN FOUNDATION	0.00	25,000.00	-25,000.00	25,000.00
COMMUNITY FOUNDATION - Monterey	15,000.00			
FOUNDATIONS - Other	200.00	143,292.96	-143,092.96	185,567.24
Total FOUNDATIONS	59,300.00	227,042.96	-167,742.96	298,367.24
MISC CASH DONATIONS	11,925.68	2,573.00	9,352.68	7,819.00
MISC VOL RECOGNITION	0.00	0.00	0.00	0.00
UNITED WAY				
Monterey County	0.00	0.00	0.00	0.00
Santa Cruz County	0.00	5,000.00	-5,000.00	5,000.00
UNITED WAY - Other	0.00	0.00	0.00	0.00
Total UNITED WAY	0.00	5,000.00	-5,000.00	5,000.00
Total LOCAL MATCH RECEIVED - OTHER	71,225.68	234,615.96	-163,390.28	311,186.24
OTHER INCOME				
FGP / SCP 5310	0.00	0.00	0.00	0.00
Seniors Council Admin	21,259.00	45,912.00	-24,653.00	68,868.00
REFUNDS & DEPOSITS RETURNED	0.00	0.00	0.00	0.00
MISC INCOME	1,325.17	0.00	1,325.17	5,000.00
OTHER INCOME - Other	0.00	0.00	0.00	0.00
Total OTHER INCOME	22,584.17	45,912.00	-23,327.83	73,868.00
SHARE OF COSTS RECEIVED	16,226.94	14,000.00	2,226.94	28,000.00
Total Income	3,635,211.06	3,433,677.32	201,533.74	5,091,421.95
Gross Profit	3,635,211.06	3,433,677.32	201,533.74	5,091,421.95
Expense				
RECORDS SHREDDING	295.90	175.00	120.90	175.00
INCONVENIENCE FEES	0.00	0.00	0.00	0.00
PURCHASED FALLS PREVENTION SERV				

6.A-1

Seniors Council of Santa Cruz and San Benito Counties

Agency Wide Budget vs. Actual

July 2025 through February 2026

	Jul '25 - Feb 26	YTD Budget	\$ Over Budget	Annual Budget
EQUIPMENT	0.00	0.00	0.00	0.00
PURCHASED FALLS PREVENTION SERV - Other	0.00	0.00	0.00	0.00
Total PURCHASED FALLS PREVENTION SERV	0.00	0.00	0.00	0.00
OFFICE FURNITURE	2,482.27	1,537.00	945.27	2,037.00
WEBSITE	199.60	0.00	199.60	0.00
Bank Service Charges	0.00	0.00	0.00	0.00
MEETING EXPENSE	2,627.61	1,572.17	1,055.44	2,500.03
ADMINISTRATIVE EXPENSE	21,259.00	52,112.00	-30,853.00	78,168.00
Reconciliation Discrepancies	2.20	0.00	2.20	0.00
RETURN OF GRANT FUNDS	0.00	0.00	0.00	0.00
ADVERTISING & PROMOTION	12,328.04	6,791.78	5,536.26	7,822.00
BANK FEES	195.44	415.56	-220.12	480.00
CONTRACTED SERVICES				
SUB-CONTRACTOR	0.00	0.00	0.00	0.00
VENDORS	0.00	0.00	0.00	0.00
ADVERTISING	0.00	0.00	0.00	0.00
AUDIT	34,703.80	28,650.92	6,052.88	28,650.92
CASUAL LABOR	220.00	650.00	-430.00	1,150.00
CONSULTANTS	21,960.00	29,462.00	-7,502.00	40,050.00
SYNERGY	939.29	0.00	939.29	9,575.70
TRANSLATION	7,681.00	7,093.36	587.64	11,600.00
Total CONTRACTED SERVICES	65,504.09	65,856.28	-352.19	91,026.62
CRIMINAL RECORDS CHECK	1,104.50	1,666.72	-562.22	2,500.00
DISASTER KIT	0.00	0.00	0.00	0.00
ELECTRONIC FILING	833.00	1,488.92	-655.92	2,500.00
EQUIPMENT				
EQUIPMENT- EXPENDABLE	5,444.67	1,500.00	3,944.67	1,500.00
EQUIPMENT RENTAL				
MEDICAL GUARDIAN				
Mini Guardian	0.00	0.00	0.00	0.00
MG Home	0.00	0.00	0.00	0.00
MG Classic	0.00	0.00	0.00	0.00
MG Active	0.00	0.00	0.00	0.00
Total MEDICAL GUARDIAN	0.00	0.00	0.00	0.00
EQUIPMENT RENTAL - Other	6,876.63	7,627.77	-751.14	11,429.97
Total EQUIPMENT RENTAL	6,876.63	7,627.77	-751.14	11,429.97
Total EQUIPMENT	12,321.30	9,127.77	3,193.53	12,929.97
FEES	105.00	0.00	105.00	0.00
INSURANCE	11,830.20	7,752.81	4,077.39	9,846.53
MAINTENANCE & REPAIRS	26,404.16	22,513.88	3,890.28	32,663.78
MEALS	0.00	0.00	0.00	0.00
MEMBERSHIPS	10,861.93	6,137.31	4,724.62	6,349.08
OFFICE SUPPLIES	24,334.15	19,216.20	5,117.95	27,648.89
PERSONNEL				
BENEFITS				
403b	37,767.79	40,029.28	-2,261.49	56,012.56
HEALTH INSURANCE	140,713.06	168,503.81	-27,790.75	231,657.66

6.A-2

Seniors Council of Santa Cruz and San Benito Counties

Agency Wide Budget vs. Actual

July 2025 through February 2026

	Jul '25 - Feb 26	YTD Budget	\$ Over Budget	Annual Budget
WORKERS COMP INSURANCE	6,771.00	6,935.44	-164.44	7,493.76
BENEFITS - Other	0.00	0.00	0.00	0.00
Total BENEFITS	185,251.85	215,468.53	-30,216.68	295,163.98
PAYROLL - WAGES				
Payroll Expenses	0.00	0.00	0.00	0.00
P/R TAX EXPENSE	63,517.77	67,897.33	-4,379.56	97,038.33
PAYROLL - WAGES - Other	766,023.77	784,268.73	-18,244.96	1,125,680.21
Total PAYROLL - WAGES	829,541.54	852,166.06	-22,624.52	1,222,718.54
Total PERSONNEL	1,014,793.39	1,067,634.59	-52,841.20	1,517,882.52
POSTAGE	2,844.70	2,495.20	349.50	3,813.12
PRINTING & REPRODUCTION	2,124.29	7,633.36	-5,509.07	12,023.41
SPACE COSTS				
DEPOSIT	0.00	0.00	0.00	-220.00
JANITORIAL	3,780.00	2,889.64	890.36	4,497.66
OFFICE RENT	64,066.14	57,586.89	6,479.25	84,190.70
STORAGE RENT	919.96	2,272.50	-1,352.54	3,519.46
TRAINING FACILITIES	0.00	400.00	-400.00	400.00
UTILITIES	9,070.15	8,920.92	149.23	12,814.74
Total SPACE COSTS	77,836.25	72,069.95	5,766.30	105,202.56
STAFF RECOGNITION	146.08	771.91	-625.83	1,200.00
SUBSCRIPTIONS & PUBLICATIONS	0.00	0.00	0.00	0.00
TELEPHONE	12,587.74	12,796.01	-208.27	18,852.82
TOTAL GRANTS PAID (Expense)				
FARMERS' MARKET NUTRITION PROG	0.00	0.00	0.00	0.00
GRANTS PAID (Expense)	1,921,334.00	1,620,126.20	301,207.80	2,417,072.00
GRANT RELATED INCOME (Expense)	97,517.00	108,875.08	-11,358.08	163,313.00
MATCH CASH	378,582.00	1,139,610.04	-761,028.04	1,709,415.00
MATCH IN-KIND	0.00	0.00	0.00	0.00
NON MATCH CASH	114,819.00	78,661.36	36,157.64	116,658.00
NON MATCH IN-KIND	0.00	0.00	0.00	0.00
LESS MATCH	-590,918.00	-1,326,257.36	735,339.36	-1,989,386.00
TOTAL GRANTS PAID (Expense) - Other	0.00	0.00	0.00	0.00
Total TOTAL GRANTS PAID (Expense)	1,921,334.00	1,621,015.32	300,318.68	2,417,072.00
TRAINING				
FEEs	464.08	7,000.00	-6,535.92	7,000.00
LODGING	1,419.97	0.00	1,419.97	0.00
MEALS	344.00	0.00	344.00	0.00
TRAINING - Other	710.00	0.00	710.00	0.00
Total TRAINING	2,938.05	7,000.00	-4,061.95	7,000.00
TRAVEL-STAFF				
TRAVEL-LOCAL	9,070.53	9,221.14	-150.61	14,245.74
TRAVEL-LONG DISTANCE	799.34	3,700.00	-2,900.66	3,700.00
Total TRAVEL-STAFF	9,869.87	12,921.14	-3,051.27	17,945.74
VOLUNTEERS				
RECRUITMENT	0.00	0.00	0.00	0.00
OTHER VOL COSTS	0.00	0.00	0.00	0.00
INSURANCE	1,738.13	1,390.00	348.13	1,390.00

6.A-3

Seniors Council of Santa Cruz and San Benito Counties

Agency Wide Budget vs. Actual

July 2025 through February 2026

	Jul '25 - Feb 26	YTD Budget	\$ Over Budget	Annual Budget
MEALS	44,984.14	45,423.36	-439.22	68,185.00
PHYSICAL EXAMS	70.00	750.00	-680.00	850.00
RECOGNITION	978.24	4,740.97	-3,762.73	8,350.00
STIPENDS				
TEMPORARY ALLOWANCE	0.00	0.00	0.00	0.00
COORDINATORS	0.00	666.68	-666.68	1,000.00
TAX ASSISTORS	0.00	2,233.36	-2,233.36	4,400.00
STIPENDS - Other	388,153.00	358,586.68	29,566.32	537,880.00
Total STIPENDS	388,153.00	361,486.72	26,666.28	543,280.00
TRAINING	1,126.00	0.00	1,126.00	0.00
TRAVEL	72,325.95	86,884.72	-14,558.77	130,327.00
UNIFORMS	0.00	5,400.00	-5,400.00	5,400.00
Total VOLUNTEERS	509,375.46	506,075.77	3,299.69	757,782.00
Total Expense	3,746,538.22	3,506,776.65	239,761.57	5,135,421.07
Net Ordinary Income	-111,327.16	-73,099.33	-38,227.83	-43,999.12
Other Income/Expense				
Other Income				
INTEREST INCOME	560.65	592.18	-31.53	900.00
Total Other Income	560.65	592.18	-31.53	900.00
Other Expense				
Penalties	0.00	0.00	0.00	0.00
BAD DEBT	0.00	0.00	0.00	0.00
Total Other Expense	0.00	0.00	0.00	0.00
Net Other Income	560.65	592.18	-31.53	900.00
Net Income	-110,766.51	-72,507.15	-38,259.36	-43,099.12

Reserves as of 6/30/25 656,501.00

6.A-4



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 **AUDIT CLEARINGHOUSE PROCESS & POLICY**

The policy of the Seniors Council is to conduct an independent financial audit upon the completion of the July 1- June 30 fiscal year. This document spells out the detailed steps to that process, including due dates and filing the completed audit in the federal audit clearinghouse.

STEP 1: The agency will contract with an independent financial auditor to conduct an audit and submit 990's, along with various related tasks for the agency. Contracts will be completed by the end of July each year. Multi-year contracts are acceptable and often utilized. The audit firm will be required to complete, and to make a physical audit presentation to the Seniors Council Board of Directors no later than the third Thursday of March (regular Board meeting date). The agency's Executive Committee serves as the Audit Committee. The audit will include the completion of all of the steps described here.

STEP 2: Fiscal staff will schedule times and dates to meet with the selected auditor to conduct audit field work. This work will not start until after October, to insure federal grants and closeouts have been completed before the audit firm begins their work.

STEP 3: Contracted auditor staff and Fiscal staff will work closely together to complete all necessary audit tasks before the agency's March Board of Directors meeting. The final audit will be presented to the Board of Directors no later than the March Board meeting.

Final STEP: Upon acceptance of the audit by the agency Board of Directors, the contracted Auditor and the Executive Director will work closely with one another to file the audit with the Federal Audit Clearinghouse. This process includes the following:

1. The Auditor will inform the Executive Director that the audit filing is ready for review as part of the final certification.
2. The Executive Director will initiate the process on the Federal Audit Clearinghouse and notify the Auditor that the next step is ready for s/he to complete within two business days of receiving the auditor's notification.
3. The Auditor will complete the next step and notify the Executive Director of any additional steps needed to be completed.
4. The Executive Director will complete any final steps, and/or notify the Auditor if there is any final action needed by them.

5. Upon completion, the Executive Director, the Auditor, and the Fiscal Officer will independently review and confirm with each other that the audit has been successfully submitted to the Federal Audit Clearing House.

Time is of the essence on each of these steps, and they are expected to be done as soon as possible, and not lag longer than one day.

The Executive Director, the Auditor, and the Fiscal Officer will check in with each other on a daily basis until step five is completed. The following checklist will be utilized to insure completion of each step.

Final STEP described above will be completed no later than March 30 of each year

Final Step Checklist (show dates)

- _____ Audit is presented to and accepted by Board of Directors
- _____ Audit Clearinghouse request is submitted by the Executive Director, and Auditor and Fiscal Officer are informed.
- _____ Audit is uploaded to the Clearinghouse for review by the Auditor. Executive Director and Fiscal Officer are notified of its submission
- _____ Audit is submitted for final approval by Executive Director. Auditor and Fiscal officer are informed of the completion.
- _____ Audit submission to Clearinghouse is confirmed as complete by the Auditor, Fiscal Officer, and Executive Director

Policy Adopted/Updated:



AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

PROJECT SCOUT
Tax Counseling Assistance

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

Date: 4-10-26

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: Advocacy Committee Report

VISITS WITH LOCAL ELECTED REPRESENTATIVES

We again focused on ongoing efforts to meet with local electeds to discuss our priority issues, including Master Plan on Aging Local Playbook implementation, the threats of SB 1249 implementation, and, as always, growing needs among the rapidly growing senior population. A few meetings have taken place, and details were shared.

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

CALIFORNIA LEGISLATION

The California Association of Area Agencies on Aging's (C4A) proposal for an ongoing \$62 million state budget augmentation has been heard in several committees. The proposal distributes the funds between three categories, with *\$26.1 million allocated for Nutrition, \$15.66 million for Supportive Services, and \$10.44 for Caregiver Support*. The proposal has been "kept open" at each hearing; meaning it is still alive, but in an extremely bad state budget year, I think it's a longshot. The Department of Aging and the Department of Finance are NOT being helpful in the ask, as they consistently point out that there are unspent nutrition funds allocated to AAAs in the 2022-23 state budget augmentation. What the state fails to share is that the augmentation was allocated through March of 2029, and that most AAAs are exercising responsible fiscal planning in not spending the funds prior to the end of the service period. While not being stated the impression is

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

SUPPORTED BY FEDERAL, STATE & LOCAL GOVERNMENTS, PRIVATE FOUNDATIONS, THE UNITED WAY, AND YOUR PERSONAL DONATIONS

6.B-1

being given that millions of dollars are unspent and wasted, and that AAAs are incompetent. Also omitted is that it took CDA eight months to even provide an estimate of the amount of funding that each AAA would receive, or guidelines on how the funds could be used - even though existing statutes spelled that out pretty clearly. It shocks me to see how unsupportive CDA is of their own network.

Various bills have been sent to us for our support. I have reviewed several of them since our last Advocacy Committee meeting, and here is a quick analyses and recommendation. This is far from a comprehensive list.

AB 2135 (Kalra)

Increases SNF fines, and prohibits the admission of new residents until such fines are paid. Not sure we like the second part, given the shortage of SNF beds.

My recommendation: **Support if amended** to remove that aspect

SB 991 (Menjivar)

Requires findings of abuse in RCFEs to be listed on public facing database maintained by the State Dept of Social Services/Licensing

Recommendation: **Support**

AB 971 (Choi)

Transfers the ownership of 3.68 acres of land from the City of San Diego to the San Pasqual Band of Mission Indians. There is no opposition filed at this time.

Recommendation: **Neutral.** It doesn't seem relevant to our legislative platform.

SB 387 (Reyes)

Modifies the requirements to qualify as an academic medical center and exempts facilities from the Western Association of Schools and College accreditation requirements under certain circumstances.

Recommendation: **Neutral.** Beyond our scope of expertise (or at least beyond mine)

AB 2081 (Stefani)

Expands the limitation of 5,000 slots for Home and Community Based Alternatives to SNF/Acute Hospital Transition Waivers for individuals who are at risk of SNF or other institutional placement. The bill requires that DHCS increases the available slots by at least 10,000 per year starting in 2027

Recommendation: **Support**

AB 1649 (Ahrens)

Increases the monthly amount available to residents of a SNF or PACE program for their purchase of personal items from \$35 to \$50 per month.

Recommendation: **Support**

SB 1249 (Richardson)

Allows for a tax deduction for households that include elderly senior dependents, for those with household incomes of less than or equal to 600% of the federal poverty level.

Recommendation: **Support**

SB 1261 (Laird)

This bill provides relief from the California Department of Aging shutting down operating Aging & Disability Resource Connections (ADRC) for up to two years when the AAA or the Independent Living Center (ILC) in the area is re-designated.

Recommendation: **Strongly Support**

C4A has yet to adopt a legislative platform, but is in the process of doing so. Any C4A list will be shared with our Advocacy Committee for comment, but won't be as timely as usual.

SB 1249 AND CDA'S CALIFORNIA 2030 PLAN

Among the recommendations the Department is making for their 2030 plan, a new one has emerged; changing their definition of a Local Government Entity. The proposed change is to define a county as the definition of a Local Government Entity. This change is supposedly to provide "clarity" around current language, but it has serious implications for existing and future AAAs. It eliminates any possible consideration of a City or a Joint Powers Agreement or a Special District from meeting this term (and therefore having a priority in AAA designation). One example is that the City of Los Angeles is a stand-alone AAA within Los Angeles County, and, if this language were adopted, would have no recourse should the County of Los Angeles decide to pursue a hostile takeover.

At the insistence of C4A, the CDA convened a Public Hearing on this matter on the morning of April 8, along with accepting written comments. About a dozen individuals (including me) expressed serious concerns over this new definition during the hearing as well as submitting written comments. Attached are the written comments that I submitted; my verbal comments were similar but not exactly the same given the three-minute limit we all faced.



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

Thanks for the opportunity to provide input to the California Department of Aging's (CDA's) proposal to amend Section 7155 of Title 22 of the California Code of Regulations to update the definition of "unit of general-purpose local government." Our comments are below, and are followed with recommendations for the Department and others to consider.

- We're concerned that the goal of "clarifying" the definition of Unit of Government is actually a veiled attempt to replace at least some of California's 16 AAA models that are non-profit, city and/or Joint Powers Agreements, and instead, move them into County structures.
- Defining counties as the primary unit may intentionally or unintentionally limit or exclude existing and successful AAA models. We're especially concerned that this direction may have the long-term effect of discouraging inter-county collaborations. These intercounty collaborations and designations are models of cooperative government, and are especially important to rural communities that have developed working partnerships as the most practical path forward to effective and cost-efficient delivery of services.
- Any change should not create a default preference for any service model, be it a County, a Joint Powers Agreement, a City, or a non-profit.
- The Older Americans Act's strengths include its flexibility, and its recognition that we all live in a diverse, multi-cultural country of unique needs, challenges, opportunities, strengths and weaknesses. One size does not fit all, and the OAA is designed to not only recognize that diversity, but to embrace it. We understand the Department of Aging's desire for clarity and singularity of definitions, but that is contrary to the strategy, structure, and spirit of the Department's defining legislation - the Older Americans Act.
- The Department's interpretation of de-designation activities - be they actions of the Department or initiated by the local AAA - have created the need for corrective legislation already, such as SB 1261, which protects older adults and people with disabilities from the loss of local services. We're concerned that changing the very definition of a local government entity may have additional unintended operational or legal challenges that negatively impact vulnerable individuals, and/or require other regulatory or legislative changes. We encourage language to be added that clarifies that changes to the definition of Local Government will not interrupt or negatively impact services to the people served by a AAA or its contracted service providers and other partners.

Our Specific Recommendations

1. Clearly affirm that all current AAA models—county, nonprofit, city, and multi-county—are equally valid and will continue to be supported.
2. Provide clear criteria and safeguards before any designation changes occur, including consideration of performance, experience, and capacity.

175 Westridge Dr., Watsonville, CA 95076 300 West St. Hollister, CA 95023 www.seniorscouncil.org
PHONE: AAA – (831) 688-0400 • FG/SCP – (831) 475-0816 • SCOUT – 1-877-373-8297 • FAX: (831) 688-1225

6.8-4

SUPPORTED BY FEDERAL, STATE & LOCAL GOVERNMENTS, PRIVATE FOUNDATIONS, THE UNITED WAY, AND YOUR PERSONAL DONATIONS

3. Ensure that changes in AAA designation will be based on cause and improving services, rather than prioritizing one structural type over another.
4. Clarify any re-designation will be open to applicants of any structural type, including the incumbent organization, as described in the Older Americans Act, and will NOT default automatically to a County
5. Prioritize continuity and quality of services to ensure no disruption for the older adults and caregivers who rely on this network every day.

Thanks for your consideration of our comments and recommendations.

Sincerely,



Clay Kempf
Executive Director
clayk@seniorscouncil.org

cc: Speaker/Assemblyman Robert Rivas
Senator John Laird
Area Agency on Aging Advisory Council
Seniors Council Board of Directors



AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

PROJECT SCOUT
Tax Counseling Assistance

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

DATE: April 10, 2026
FROM: *PA* Patty Talbott, AAA Planner/Administrator
TO: AAA Advisory Council
Seniors Council Board of Directpors
RE: CALIFORNIA SENIOR LEGISLATURE ELECTION UPDATE

BACKGROUND

The California Senior Legislature is an all-volunteer body that serves to promote senior issues and draft senior-focused legislation. AAA Advisory Councils are the designated entity responsible for conducting the elections of the California Senior Legislature every four years. 2026 is an election year for the 2026-30 term. Statewide there are 120 senior Assemblymembers and 40 Senior Senators. Our AAA is allocated one Senior Senator and one Senior Assemblymember. Candidates must be 55 or older.

ELECTION TIMELINE AND PROCESS

MARCH 31 was the deadline to apply. Three applications were received.

Senior Senator: One applicant, current Senior Senator Mickie Luna (San Benito Co.)

Senior Assemblymember: Two applicants, both from Santa Cruz County, incumbent Antonio Rivas and Mark Hucklebridge

APRIL 1: Staff uploaded completed applications to State CSL Office for review.

APRIL 1-30: State CSL Office reviews all applications for completeness and provides each AAA with a list of their approved candidates by April 30th. **This has been received and is included with this item. All three applicants have been approved.**

MAY- ELECTION AT MAY AAA ADVISORY COUNCIL MEETING

The State CSL provides several election options for AAA to select from. Because there is no budget for the election, and given the small size and limited resources of our AAA, we plan to conduct this elected as we have for the past few elections using the approved option of election by AAA Advisory Council at its May meeting.

Who can Vote? Voting will be in person only. All AAA Advisory Council members present OR their designated alternate may vote. There is no age requirement for voting. If both the member and their alternate are present, only the member may vote.

The election process will be as follows:

1. All three candidate resumes will be included in the May Agenda packets so that you can become familiar with the candidates and their background.
2. Each candidate will have an opportunity to introduce themselves and speak briefly.
3. Because there is no challenger for the Senior Senator seat, there will be a vote by motion to appoint Mickie Luna as Senior Senator.
4. For Senior Assemblymember, each Advisory Council member present (or their designated alternate) will receive an anonymous ballot and make their selection. If both are present, only the member may vote.
5. Staff will tally the ballots and announce the winner.
6. Staff will notify the State CSL Office of the results.

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

PHONE: AAA – (831) 688-0400 • FG/SCP – (831) 475-0816 • SCOUT – 1-877-373-8297 • FAX: (831) 688-1225

SUPPORTED BY FEDERAL, STATE & LOCAL GOVERNMENTS, PRIVATE FOUNDATIONS, THE UNITED WAY, AND YOUR PERSONAL DONATIONS

6.B-6



AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

PROJECT SCOUT
Tax Counseling Assistance

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

Date: 4-9-26

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: April Resource Development Committee Meeting

BACKGROUND

On Tuesday, April 7th, we held our second meeting since Board members have been added to the Seniors Council Resource Development Committee. Attendees included Mary Lou McKenney, Tami Aviles, Britt Bassoni, Zach Friend, and myself. Ed Santana was excused in advance due to tax season demands in Project SCOUT. Cristina Bañuelos was absent.

Meeting Discussion and Action Steps

Vibrant and productive discussion highlighted the meeting resulting in a number of ideas and next steps. These include:

1. Inclusion of Elevator Speeches developed by each of the agency's program and project leaders. Not only does this prepare Board members for promoting our services, it's also a useful educational tool for all involved.
2. Recruit additional Board & possibly community members to join the Program Development Committee. Volunteers with I.T. skills are especially wanted.
3. Create an annual Resource Development Calendar, including special events and outreach efforts to highlight both funding opportunities and increase public awareness, highlighting things like Older Americans Month, Grandparent Day, etc.
4. Bring back our "Virtual Tea Party" non-event to jump start and expand our list of donors, challenging each Board member to provide ten names and addresses to promote the event to.

6.E-1

5. Invite all Board members to this and future years Volunteer Appreciation Events.
6. Design methods and strategies for using current and future events (volunteer recognition, Senior Resource Fair, etc.) as easy steps to expand our donor base.

Lastly, the group committed to continuing to develop new and expanded strategies to grow our donor base and increase resource development efforts, and to provide regular reports to the Board of Directors.

AAA & Seniors Council Elevator Speeches

AAA Elevator Pitch

The Area Agency on Aging funds, guides, and supports local non-profits that care for older adults in Santa Cruz & San Benito Counties. Our knowledge of local providers ensures state & Federal funds are used effectively, a task that the government can't provide. We are statewide and local leaders in advocating for funding and policies that benefit older adults.

We provide local control over the use and distribution of federal and state dollars, as well as monitoring and reviewing the quality and quantity of services provided with those funds.

I'd love to talk more with you about ways you could support our efforts.

Seniors Council Elevator Pitch

The Seniors Council is an umbrella non-profit that runs various programs in Santa Cruz, San Benito, Monterey and even Santa Clara Counties. Having all of these programs in one agency allows us to have a stronger and more cost-effective structure that benefits each of the specific programs in their efforts to help older adults remain healthy and independent.

I'd love to talk more with you about ways you could support our efforts.

In either instance, if they dodge the request and imply that money is a reason, add in "I know we are all stretched thin financially, but there are other important ways that you could help that we'd love to discuss"

Elevator Pitch FGP/SCP

We have 132 Foster Grandparent volunteers who are all 55 years or older and receive a \$4 per hour stipend, as well as transportation reimbursement for the volunteer hours they serve. Volunteers mentor and tutor 226 students who are struggling academically and socially. The program connects role models with students who benefit from the caring connection they provide in the classroom under a teacher's guidance. We strategically partner with schools across Santa Cruz, San Benito, Monterey, and Santa Clara counties to ensure systems work together and respond to our community's unique needs. We're part of a statewide network that positively impacts our local communities. We are nimble and efficient, with a trusted network of care in our four counties.

We have 37 Senior Companions who serve as friendly visitors, providing assistance to 56 seniors and community members who are lonely and have difficulty with daily living tasks. The volunteers provide friendship, emotional support, and transportation for errands. Senior Companions also provide respite to family caregivers who benefit from getting time for themselves. We partner with a network of care in our counties, including Senior Centers, Alliance on Aging agencies, and Health Project Centers, to ensure systems work together and respond to our community's unique needs. We're part of a statewide network that positively impacts our local communities. We are nimble and efficient, with a trusted network of care in Santa Cruz, San Benito, Santa Clara, and Monterey Counties.

SBC Volunteer Elevator Pitch

SBC Volunteers is the first centralized volunteer platform in San Benito County—connecting local organizations, especially those serving seniors, with people in the community who want to help but don't know where to start.

So far, we've brought on over 20 organizations and 50 active volunteers, and we're continuing to grow.

Our goal is to make it simple for organizations to find support and for volunteers to connect with meaningful opportunities.

With additional funding, we can expand outreach, increase participation, and strengthen this as a long-term resource for the community—helping ensure essential services continue to reach those who need them most.

Overview

SBC Volunteers (www.SBCVolunteers.org) is a centralized volunteer platform designed to connect community members with local organizations—especially those serving older adults and vulnerable populations. The platform streamlines volunteer recruitment while increasing access to meaningful opportunities across San Benito County.

The Need

Many local organizations struggle to recruit and retain volunteers, limiting their ability to deliver critical services. At the same time, community members are willing to help but lack a clear, trusted place to find opportunities. SBC Volunteers bridges this gap.

What We've Accomplished

- 20+ local organizations actively engaged
- 50+ registered volunteers on the platform
- 6+ active volunteer opportunities available
- Established a countywide, easy-to-use volunteer hub
- Increased visibility and collaboration among service providers

Impact

SBC Volunteers strengthens the local safety net by helping organizations expand their capacity through volunteer support. This directly contributes to improving services for seniors, caregivers, and underserved populations while fostering stronger community connections.

Funding Opportunity

Additional funding will allow us to:

- Expand outreach and marketing to recruit more volunteers
- Increase the number of participating organizations
- Provide training and onboarding support for agencies
- Enhance platform usage and tracking capabilities
- Build long-term sustainability for a countywide volunteer infrastructure

Why It Matters

SBC Volunteers is not just a website—it is the foundation for a coordinated, community-driven approach to volunteerism. By investing in this program, donors help ensure that essential services continue to reach those who need them most.

Aging & Disability Resources Connection of San Benito County
A 'No Wrong Door' Network of Non-Profit Community Service Providers

Short Pitch

We help people get to where they need to go. We help people get the community-based aging and disability resources assistance they need to stay more independent. We help people find the services they need to help those whom they love.

The Aging & Disability Resources Connection of San Benito County, the "ADRC," is a both a service hub and a network of community providers who work collaboratively and seamlessly meet the needs of individuals, families, friends, and neighbors. The goal of the program is to help consumers find the community-based long term services and supports needed to remain in their home and community for as long as is safely and realistically possible.

ADRC staff and our community partners are trained to listen, respond to, and help connect people and families to these vital supports, saving them time and energy while working to achieve lasting and meaningful results to help people live where and how they want to live, regardless of age or disability. The larger benefit of ADRC services is the preservation of more diverse, equitable, and inclusive communities benefitting all who live in them.

Your financial support, as well as you sharing with others about the availability of our services, are both greatly appreciated.

ADRCs help individuals live better, and help communities to thrive.

Aging & Disability Resources Connection of San Benito County
A 'No Wrong Door' Network of Non-Profit Community Service Providers

Extended Pitch

ADRCs help us understand our community living support needs, discuss options, and help plan and prioritize how to best meet those needs.

ADRCs provide services and resources information about other community programs, city and county supports, and even State and national resources.

ADRCs offer assistance and support in accessing a wide array of other community services through a strong referral network, and by providing application and enrollment assistance and even consumer advocacy.

ADRCs deliver one-on-one assistance with supported decision-making, access to technology supports, short term care management, and even help with housing and care transitions.

In short, the ADRC and its partners do the work of a collaborative team in meeting the specific and varied needs of older adults, individuals living with disability, caregivers, and families.

ADRCs help individuals live better, and help communities to thrive.

The ADRC of San Benito County is part of a statewide effort to get more of these vital ADRC support services to individuals everywhere across California. San Benito County is fortunate to have one of only nineteen officially designated ADRCs, meaning the ADRC staff and its 'No Wrong Door' Network of partners have met and continue to meet high standards around the delivery of person-centered programs and services.

Unfortunately, State funding for the ADRC of San Benito County is inadequate to meet the aging and disability resources and service needs and challenges of one of the fastest growing aging populations in California. An investment in the local Aging & Disability Resources Connection is an investment in community solutions to aging and disability challenges and supports. Current State funding supports two full time ADRC staff, a part time supervisor, office space, and typical office overhead costs including insurance, computing, data storage, paper, printing, and the like.

The work done by the ADRC of San Benito County can be short in duration, or often times complex and labor-intensive. There are rarely, if ever, substitutes for the kind of expertise and time needed to address and resolve complex consumer needs in an impactful and lasting way, and ADRC staff are trained to listen, respond to, and help connect people and families to these vital supports, saving them time and energy while working to achieve lasting and meaningful results.



SERVICE + SUPPORT + ADVOCACY

AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

PROJECT SCOUT
Tax Counseling Assistance

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

DATE: April 10, 2026
TO: AAA Advisory Council
Seniors Council Board of Directors
FROM: Patty Talbott, AAA Administrator/Planner
RE: 2026-27 Update to the 2024-28 Area Plan on Aging

The Area Plan is a comprehensive document that must be completed in accordance with a prescribed template provided by the Department of Aging and the content required is very specific. The plan also requires annual updates. The 2024-28 full Area Plan with 25/26 updates submitted last May was approved by the Department of Aging and is posted on our website.

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

Included with this item is the draft summary report for the 2026-27 annual update to the 2024-28 Area Plan on Aging. This includes information about the AAA and planning process as well as Goals and Objectives for review and estimated services and funding for 2025-26.

- **Goals and Objectives.** No changes were proposed to the goals. Objectives are noted as Continued, Revised or Completed. Objective 3.9 was added for Calfresh Outreach.
- **Proposed Service Units and Funding.** As the Department of Aging has not yet released our 2026-27 funding awards, we do not have confirmed funding amounts yet. We do not anticipate any significant changes in funding at this time. Final awards will be provided next month.

Questions or comments welcome.

Action Requested: Approval of Area Plan Update Summary Report including updated Goals and Objectives.

7-1



AREA AGENCY ON AGING
FOR SANTA CRUZ AND SAN BENITO COUNTIES

**2024-28
AREA PLAN ON AGING
2026-27 Update**

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

175 Westridge Drive, Watsonville, CA
www.seniorscouncil.org

OVERVIEW OF THE AREA AGENCY ON AGING

OUR HISTORY

Founded as a grassroots senior organization in 1979, the Seniors Council successfully applied to the California Department of Aging to be the designated Area Agency on Aging (AAA) for Santa Cruz and San Benito Counties as they were being established. And has been the designated AAA for these counties since 1980, part of a network of 33 such agencies in California.

WHAT ARE THE RESPONSIBILITIES OF AN AREA AGENCY ON AGING?

- **Assess** the needs of seniors.
- **Advocate** at the local and state level for the needs of seniors.
- **Provide visible leadership** on senior issues in the community by monitoring and evaluating and commenting, or providing technical support on issues affecting seniors.
- **Plan for services** for the more than **82,000 seniors (age 60+)** and their caregivers in Santa Cruz and San Benito Counties, and ensure that all senior services are well-coordinated.
- **Receive and allocate Older Americans Act funding and other state and federal funding dedicated to Area Agency on Aging services in our two-county planning region.** Nearly all program funding is contracted out to local community-based service providers.
- **Ensure that AAA-funded programs provide quality, efficient, effective services** that meet all OAA program and regulatory requirements and service delivery methods.
- **Ensure that the senior service delivery network is well-coordinated.**
- **Monitor emerging needs and support the development of innovative programs**
- **Engage at the local level in the development and implementation of local Master Plan for Aging playbooks**

WHO DOES THE AREA AGENCY ON AGING SERVE?

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

The California Department of Aging estimates that in 2026, the 60+ population is:*

Santa Cruz County: 68,399 persons age 60 or older with 23,198 age 75+

San Benito County: 14,267 persons age 60 or older with 4,023 age 75+

**Source: 2026 California Department of Finance Population Projections.*

THE AREA AGENCY ON AGING PLANNING AND CONTRACT CYCLE

Assess needs



Develop a plan



Allocate Funds



Ensure Quality &
Accountability

➔ ASSESSING LOCAL NEEDS

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

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

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

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

➡ DEVELOPING THE AREA PLAN ON AGING

The AAA prepares the 4-year Area Plan on Aging for submittal to the California Department on Aging. The current plan is on a 2024-28 cycle. The plan outlines our goals and what services that will be provided with the federal and state program funds that the AAA receives and contracts for. **The Area Plan on Aging has specific regulatory requirements, templates and formats provided by CDA.** This summary is provided to highlight the proposed goals and objectives and proposed funding and services in a more accessible format. The Area Plan also highlights the AAA's unique role in providing advocacy and leadership on senior issues and ensuring a well-coordinated senior service delivery network. **The Plan and its annual updates must be submitted to the California Department of Aging each May for review and approval.**

➡ ALLOCATING FUNDS

Funding for Area Agency on Aging programs originates at the federal level with the Older Americans Act, and is augmented by state matching funds and other state funding streams. These funds come in specific service categories. **AAAs are also required to obtain local matching funds,** these local funds are critical to service delivery.

➡ FUNDING AWARDS AND CONTRACT CYCLES

The AAA issues contract awards in a four-year cycle. A request for proposals was undertaken in Spring, 2025 for most AAA services for the 2025-29 contract cycle (with the exception of the The Long Term Care Ombudsman program, which operates on 2024-28 contract cycle).

Successful applicants were awarded one-year contracts, beginning on July 1, 2025, with subsequent annual renewals issued up to three times, pending funding availability and that the provider remains in good standing with the contract terms. The outcome of the process resulted in a new nutrition provider for San Benito County, Martha's Kitchen, and a consolidated two-county Family Caregiver Support Program to the Del Mar Caregiver Resource Center.

➡ ENSURING QUALITY & ACCOUNTABILITY

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

PRIORITIES FOR THE AREA AGENCY ON AGING IN 2026-27

- **Continue to monitor developments at the federal level, such as the dismantling of the Administration on Community Living, and advocate** for the preservation of senior programs, services and maintain vital safety net programs providing basic economic security and essential healthcare.
- **After convening highly successful Solutions Summits in each county and coordinating ongoing workgroups, AAA staff will continue to engage with Master Plan for Aging efforts,** at the State and local level, providing expertise to the development of local playbooks.
- **Continue to promote the Aging and Disability Resource Connection (ADRC) as a “one stop shop”** for information and service coordination in San Benito County.
- **Building on a successful campaign to promote volunteerism in San Benito County, continue to expand the number of active volunteers engaged in senior programs and promote senior volunteerism in Santa Cruz County.**
- **Provide expertise and technical support** for local projects related to senior issues.
- **Monitor proposals or legislation affecting seniors** and coordinate advocacy efforts as needed.
- **Provide support to the AAA contracted service provider network** to ensure a **sustainable and viable service delivery system of high quality, proven programs** that support the greatest level of autonomy and independence for seniors.
- **Engage in the development of California’s 2030 plan and implementation of SB1249 by the California Department of Aging.**

MASTER PLAN FOR AGING

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

Proposed Coordination Objectives in the Area Plan

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

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

2026-27 AREA PLAN UPDATE GOALS AND OBJECTIVES

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

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

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

Objectives

1.1 State leadership on senior issues. AAA Executive Director will continue to work with former members of the State Master Plan on Aging Workgroup to share opportunities for improving OAA and non-OAA services and service delivery as well as identify unique equitable opportunities for older Californians to thrive and age in place. Measurement: State funding will be allocated that addresses objectives of the Master Plan for Aging 7/1/26-6/30/27 **C**
Status: Continuing

1.2 Local leadership on senior issues. The AAA Executive Director will provide local leadership to educate and inform elected officials and the public about current and emerging issues affecting seniors. Measurement: increased awareness about the needs of seniors in the PSA. 7/1/26-6/30/27 *Status: Continuing*

1.3 Local advocacy and engagement. The Seniors Council Advocacy Committee will identify local advocacy priorities and through advocacy alerts and updates on the Seniors Council website, promote civic engagement. The Committee will also monitor any efforts at the federal level to reduce or eliminate senior programs. Measurement: approved legislative platform, increased web visits to Seniors Council advocacy page and successful advocacy efforts. 7/1/26-6/30/27 *Status: Revised*

1.4 Active participation on local commissions and committees. The AAA Executive Director and AAA staff will actively participate on local committees and commissions including the Santa Cruz County Seniors Commission, San Benito County Aging and Long Term Care Commission, Santa Cruz County RTC's Elderly and Disabled Transportation Advisory Committee and San Benito County Social Services Transportation Advisory Committee. Measurement: regular attendance and participation at these meetings. 7/1/26-6/30/27 *Status: Continuing* **C**

2026-27 AREA PLAN UPDATE GOALS AND OBJECTIVES

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

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

Objectives:

2.1 Contracts and Allocations. AAA staff will ensure that AAA service delivery funds are allocated appropriately in accordance with the mandates and requirements of the California Department of Aging and all applicable regulations. 2024-25 will be the final year of the current contract cycle. After completion of the Requests for Proposal process, contracted providers will begin the 2025-29 contract cycle.. Contracted providers will be awarded one-year contracts, renewable annually up to three times, provided the contractor remains in good standing and availability of funding. Measurement: Successful execution of AAA service provider funding contracts for the 2025-26 program year 7/1/26-6/30/27

Status: Continuing

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

Status: Continuing

2.3 Quality Services, Measurable Results. In accordance with the service unit plan outlined in this Area Plan, the AAA will ensure the effective provision of services of Title IIIB Supportive Services, Title IIIC Nutrition Programs including Older Californians Act Nutrition Modernization funding, Title IIID Health Promotion, Title IIIE Family Caregiver Support Program, Long Term Care Ombudsman and Title VIII Elder Abuse Prevention Program, as well as the Health Insurance Counseling and Advocacy Program, associated MIPPA Medicare outreach program. Expected outcome is provision of services that meet program service delivery requirements and that service targets contained in approved work plans and are delivered.

Measurement: Documentation of ongoing service performance 7/1/26-6/30/27

Status: Continuing

2.4 Equity and Targeting to Those in Greatest Need. In accordance with the Older Americans Act, all AAA-funded service providers will be required by policy and contract language to target services to those in greatest economic and social need including low-income, ethnic minority seniors and the recognition of HIV positive seniors as a population included in greatest social need. Services will be accessible and culturally competent.
Measurement: client data reporting and program monitoring 7/1/26-6/30/27
Status: Continuing

2.5 Ensure a coordinated service delivery network. The AAA Executive Director will convene monthly meetings of Aging and Disability Service Providers to ensure a high level of coordination and information sharing beyond the AAA-contracted network. Non-AAA contracted providers include: the Central Coast Center for Independent Living, the Diversity Center, the Cabrillo College Stroke Center, Damian's Ladder, Elderday Adult Day Health Care, Grey Bears Brown Bag Program and Village Santa Cruz. Measurement: coordinated communication and sharing of information.
7/1/26-6/30/27 *Status: Continuing* C

2.6 Coordinate with organizations such as senior center directors and Parks and Recreation Departments and others to encourage new partnerships and collaborations. Focus will continue on senior center director's meetings and coordinating with Parks and Recreation programs. Measurement: increased coordination and collaboration with senior centers and Parks and Recreation departments. 7/1/26-6/30/27
Status: Continuing C

2026-27 AREA PLAN UPDATE GOALS AND OBJECTIVES

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

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

Objectives

3.1 Information & Assistance Through the provision of Title IIIB and Title IIIE information and assistance services by AAA contracted providers in both counties, the public will have access to accurate, up-to-date information about senior programs and services. Services will be available by phone, through agency web pages and via agency-developed resource guides. In San Benito County, the ADRC will be the central point of contact for information. Measurement: achievement of service unit targets, distribution of resource guides and maintenance of websites. 7/1/26-6/30/27 *Status: Continuing*

3.2 ADRC San Benito County. The San Benito County Aging and Disability Resource Connection (ADRC) the AAA, in collaboration with local partners such as the Central Coast Independent Living Center, and the San Benito County Aging and Long Term Care Commission will continue their work to expand and enhance the “no wrong door” system in San Benito County for seniors and persons with disabilities. Measurement: increasing utilization of the ADRC for seniors and persons with disabilities 7/1/26-6/30/27 *Status: Continuing*

3.3 Maintain and support key focal points for senior services.

3.3.1 With the loss of the Live Oak Senior Center as a key focal point and the relocation of Senior Network Services to a new location, the AAA Executive Director and key staff will work with this contracted I&A provider to ensure that access to information resources is maintained **as a hub** for programs and information. The Watsonville Senior Center continues to be a focal point. 7/1/26-6/30/27 *Status: Revised*

3.3.2 The AAA Executive Director will engage with the City of Watsonville to address new, ongoing and emerging issues and services to support older adults living in the City of Watsonville and surrounding South Santa Cruz County areas. Measurement: improved coordination and continued strengthening of this key focal point for senior services and expanded opportunities for engagement for seniors. 7/1/26-6/30/27 *Status: Revised* **C**

3.4 Legal Assistance. Through a contract with an approved Title IIIB Legal Assistance provider, the AAA will ensure that seniors in Santa Cruz and San Benito Counties will have access to free, high quality Legal Assistance for issues such as benefits eligibility, consumer and housing issues and other issues in the allowable scope of service.

Measurement: achievement of service unit targets 7/1/26-6/30/27

Status: *Continuing*

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

7/1/26-6/30/27

Status: *Continuing*

3.6 Elder Abuse Prevention. Through a contract with the Long Term Care Ombudsman provider, Title VII Elder Abuse Prevention activities will result in greater awareness about elder abuse, including identifying and preventing elder/dependent adult abuse. Services may include: public education sessions, trainings for professionals or caregivers and support to develop a coordinated system for elder abuse prevention. Measurement: achievement of benchmarks in service unit plan. 7/1/26-6/30/27

Status: *Continuing*

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

achievement of established benchmarks. 7/1/26-6/30/27

Status: *Continuing*

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

7/1/26-6/30/27

Status: *Continuing*

3.9 CalFresh Outreach and Assistance. The AAA through a grant administered the Department of Aging and with the support of Project SCOUT, will assist potentially eligible individuals in applying for CalFresh.

Status: *New*

3.10 Senior Farmers Market Vouchers. The AAA Registered Dietitian will oversee the distribution of Senior Farmers Market vouchers to qualifying seniors at senior market days in summer, 2026. Seniors will benefit from increased access to fresh fruits and vegetables.

Measurement: distribution of vouchers to qualifying seniors.

7/1/26-6/30/27

Status: *Continuing*

3.11 Family Caregiver Support Program. Through a contract with an approved provider, the AAA will ensure the provision of a coordinated, two-county Title III E Family Caregiver Support Program that will support caregivers in their caregiving role, thereby allowing the care receiver to maintain a healthy, safe lifestyle in the home setting. This will be accomplished through the provision of the Title III E Family Caregiver Support Program with services identified to meet priority local needs, including respite. Measurement: achievement of service unit targets in workplans. 7/1/26-6/30/27 Status: Revised

3.12 Title III C Nutrition Programs. Through contracts with approved providers in each county, the AAA will ensure the provision of Title III C1 Congregate Meals at senior dining sites and III C2 Home-Delivered Meals. Measurement: achievement of service unit targets in workplans. 7/1/26-6/30/27 Status: Continuing

3.13. Aging in Place-Minor Home Repairs/Home Safety/Falls Prevention. Through contracts with approved providers, the AAA will ensure the provision of volunteer-based Title III B minor residential repairs/home safety program. Focus will be on modifications that improve home safety and support senior's ability to remain safely independent in their homes and providing educational materials to improve awareness about falls prevention. Measurement: number of seniors served and number of modifications. 7/1/26-6/30/27 Status: Revised

3.14 Decreasing Isolation/Supporting Mental Health. Through a contract with an approved provider, the AAA will utilize Title III B funds to support visits to isolated seniors and peer counseling. 7/1/26-6/30/27 Status: Continuing

3.15 Provide Health Promotion Programs: Through the use of Title III D Health Promotion funds, the AAA will contract for the provision of approved evidence-based classes in the Area Plan including a coordinated Matter of Balance program for the PSA. Measurement: number of volunteers trained and class sessions provided with Title III D funding. 7/1/26-6/30/27 Status: Revised

2026-27 AREA PLAN AREA PLAN UPDATE GOALS AND OBJECTIVES

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

Rationale: Providing programs and supports that empower seniors to remain as healthy, independent and engaged in their communities to the greatest extent possible is the core mission of Area Agencies on Aging. Both the Master Plan for Aging and Age Friendly Communities provide a way to ensure that the needs of seniors are included in local planning processes. A recent survey by AARP found that ¾ of survey respondents expressed a desire to stay in their current residence as long as possible.

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

Measurement: development of local playbooks with specific objectives for local implementation of the Master Plan for Aging 7/1/26-6/30/27 Status: Complete C

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

4.1.2 As a follow up to the Solutions Summit, the AAA will provide support to MPA Advisory Committees and workgroups for each Master Plan for Aging goal in both counties that will be formed to help implement recommended objectives for each of the five bold goals. 7/1/26-6/30/27 Status: Revised C

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

4.2.1 Following the convening of a Solutions Summit in San Benito County in May, 2024, AAA staff will provide support and coordination for the convening of workgroups to develop recommendations for local objectives for each of the five bold goals of the Master Plan for Aging. 7/1/26-6/30/27 Status: Continuing

4.3 Local Age Friendly Planning. The AAA Executive Director, and key staff, will continue to engage in local efforts in the PSA to create Age Friendly communities in Santa Cruz and San Benito Counties, providing local expertise and planning support as appropriate, with a goal of a coordinated planning effort. Measurement: number of trainings, informational meetings and jurisdictions taking action to commit to Age Friendly/Livable Communities Projects. 7/1/26-6/30/27 Status: Continuing C

4.4 Promote and Expand Opportunities for Senior Volunteerism and Engagement. The AAA Executive Director, in partnership with the Volunteer Center in Santa Cruz County, will promote civic engagement and volunteerism by seniors and encourage its contracted service providers and the Aging and Disability Provider Network to offer meaningful opportunities for seniors to participate in, and contribute to program operations. AAA funding will support a number of programs that utilize trained senior volunteers to provide services including: tax preparation, Ombudsmen services, minor home modifications, assistance at senior dining centers, Foster Grandparent and Senior Companion, delivery of home-delivered meals, and HICAP counseling. 7/1/26-/30/27 *Status: Revised*

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

4.6 In partnership with the Community Foundation for San Benito County, the AAA will coordinate efforts to continue to develop a Volunteer Recruitment Program in San Benito County to promote volunteerism and coordinate recruitment and placement of volunteers. Measurement: increased opportunities for senior volunteerism and engagement, and development of a volunteer program in San Benito County. 7/1/26-6/30/27
Status: Revised

4.7 Local Disaster Preparedness. The AAA staff will continue to support efforts at the State and local level to improve coordinated disaster preparedness efforts for fire, flood and earthquakes and planned power shut-offs and advocate for disaster planning to be included as a domain in all Age Friendly planning. As part of this effort, the AAA will complete a major distribution of emergency kits and preparedness information in both counties. Measurement: Participation in local efforts and successful inclusion of disaster preparedness in Age Friendly planning and distribution of emergency kits and preparedness information. 7/1/25-26 *Status: Complete*

2026-27 CONTRACTED SERVICES

SERVING SANTA CRUZ COUNTY ONLY

COMMUNITY BRIDGES

Meals at Senior Dining Sites
Transportation to Meal Sites

SENIOR NETWORK SERVICES

Information and Assistance
Case Management

FAMILY SERVICE AGENCY

Peer Counseling and Friendly Visiting
in Senior Living facilities

VOLUNTEER CENTER

Helping Hands Senior Home Repair

SERVING SAN BENITO COUNTY ONLY

MARTHA'S KITCHEN

Home-Delivered Meals
Meals at Senior Dining Sites

SAN BENITO COUNTY ADRC

Information & Assistance/Case Management

SERVING BOTH SANTA CRUZ AND SAN BENITO COUNTIES

HEALTH PROJECTS CENTER

Family Caregiver Support Program

VOLUNTEER CENTER

Health Promotion: Matter of Balance

SENIOR LEGAL SERVICES

Legal Assistance

SENIOR NETWORK SERVICES

Ombudsman & Elder Abuse Prevention
Health Insurance Counseling and Advocacy
Program

AREA AGENCY ON AGING DIRECT SERVICES

Project SCOUT Tax Assistance
Outreach/Senior Farmer's Market Voucher Distribution
Approved Coordination Activities

**note: AAA Direct Services utilize less than 3% of available service funding*



AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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

PROJECT SCOUT
Tax Counseling Assistance

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

Date: 4-9-26

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: Executive Director's March Report

BUDGET SHORTFALLS

All of our programs started the fiscal 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 various amounts. None of these deficits are large enough to threaten the operation of any program or the agency, and they're easily offset by our agency-wide reserves of \$656,501. Efforts continue to generate new agency wide AND program-specific funding, but we are in a difficult political time and event more budget cuts are on the horizon, coupled with higher-than-usual cost increases. Our health benefits, already costing us over \$225,000 per year, for example, are increasing by about 17% in the coming year. Other known funding losses are Monterey and Santa Cruz County's elimination of Behavioral Health funds for our Senior Companion Program; the expiration of Older Californian's Act Modernization funds that support our San Benito County Volunteer Coordination Program; etc. Americorps is once again slated for complete elimination by the Trump Administration. For our planning purposes, we have to assume those funds will again be restored; otherwise, it will be impossible for us to operate either Foster Grandparent or Senior Companion as we know them.

We're facing two options; the first, would be to continue current operations until we eliminate all of ours reserves; a plan that dooms us for eventual collapse and isn't a viable choice, or find other ways to balance our budgets. The option of increasing our revenue is of course the preferred direction; we used that approach this year and while some progress has been made, it has fallen significantly short of our targets.

That leaves us one realistic direction to pursue; reducing expenses. Unfortunately, the vast majority of our funding falls into three distinct categories; 1) AAA grants to subcontractors; 2) Volunteer expenses (mainly FGP/SCP stipends); and 3), Personnel Costs (wages and benefits). Those three categories total about \$4.6 million of our

8-1

agency's \$5.1 million budget. All the remaining costs can and will be (and already are) looked at for trimming, but the savings we can make there are trivial as a portion of our total budget.

We've been discussing this challenge internally among our program directors. This week, we explored it in depth during the AAA staff meeting - in part because that group has our most experienced staff - me, Patty, Britt, Cathy and Hilary. Our next plan of action is to look at several components for the entire agency and program-by-program, and to explore our options for cutting costs in personnel. This will include hourly reductions - including looking at reorganizing agency structures and insuring there are adequate hours for completing critical tasks- and include the possible elimination of positions or combining them; a reduction of benefits; and various reorganization models if we can come up with any. We hope to have options to consider within each subcategory for further discussion and consideration.

Cutting our non-personnel options that are listed isn't practical, as grants to subcontractors isn't a funding category that we can easily transfer to in-house revenue unless we attempt to directly operate the subcontracted programs. And doing so would, of course, result in additional staff costs, not less, so we don't see a pathway to savings there. The same is true of the volunteer stipends; reducing our volunteers means we lose those dollars, as they can't be spent on staff.

Our Finance Committee will be meeting in May to review and discuss the possibilities that staff can develop, and then provide leadership in Board discussions and actions.

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.

AGENCY OPERATIONS & FUNDING

Project SCOUT staff and devoted volunteers are headed towards the end of their busiest time of the year but it's not here yet. The program usually goes close to full tilt until mid-May to assist people who have filed extensions or just missed their deadlines.

Program Director Cristina Bañuelos has submitted new 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. Cristina is applying for increases over her current grant amounts, and we're all crossing our fingers that those submissions will be successful.

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

CDA continues to chug along with their California 2030 plans and held their latest webinar on April 7, 2026. The main focus of that meeting was to review data sharing and revisit their new IntraState Funding Formula (IFF). Unfortunately, there continues to be very little interactive dialogue with the AAA network. CDA's Director was not present for the webinar, and I believe she was also absent from a public hearing on regulatory changes the following day. Disappointing.

The following content repeats detailed information about the pending timeline and action that is underway. It's been in previous packets, but I find it valuable to include it yet again as a tool to remind all of us of what comes next. There has been one significant addition; the Department has petitioned changing the regulatory definition of "local unit of government"; supposedly to clarify the use of that definition from federal Older Americans Act regulations. Our comments on that topic are covered under this month's Advocacy Committee report.

CDA's priorities and timeline for implement their 2030 plan 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. Until that is resolved, CDA will be responsible for the direct operation of the AAA.

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 mixed responses. Corey and Zach had very productive Local Playbook workgroups meetings last 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.

Service delivery in Hollister at the Pauline Valdivia Memorial Center is proving to be more challenging than expected. The building is undergoing repairs and renovations, causing it to be closed at times. Unfortunately, those closures are not aligning with proposed timelines or durations, causing unexpected disruptions in the provision of congregate and home-delivered meals, of the operations of our ADRC's information & support service, and Project SCOUT's tax assistance. Britt, Bill Lee of Martha's Kitchen, and Ed Santana are doing their best to mitigate the disruptions, but service is compromised and all involved parties are spending additional time problem solving the logistical challenges created. We are attempting to resolve the challenges and avoid future experiences of this nature with Hollister Parks and Rec staff.

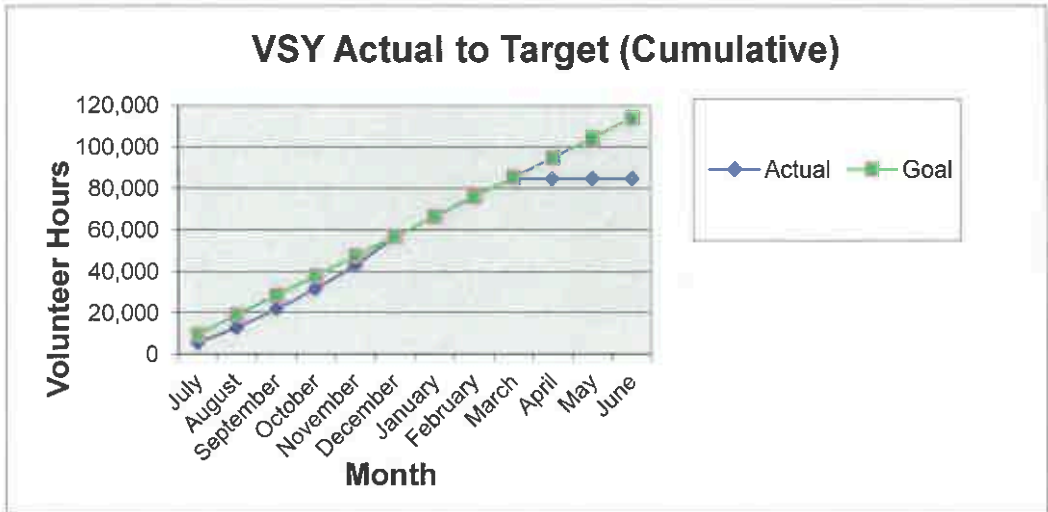
Jovenes de Antaño is challenging the transfer of two vehicles that were purchased using AAA funds and are used to deliver meals. The vehicles were cooperatively handed over to Martha's Kitchen back in June/July of 2025, and legal transfer of ownership completed for one; unfortunately paperwork was not finalized for vehicle #2. We're not sure why Jovenes has challenged the ownership of both vehicles, or even one of them, but some of the arguments are bordering on the bizarre. If not resolved soon, we'll solicit the legal assistance of the state Department of Aging.

California Senior Legislature (CSL) elections are on the horizon, and so far with have three applicants for the two seats, including CSL incumbents Senator Mickie Luna and Assemblyman Antonio. We anticipate holding the elections during our May AAA Advisory Council meeting,

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	123	5,316	109
August	12,921	18,966	7.11	9.08	7,422	123	6,996	109
September	21,992	28,449	8.69	9.08	9,072	130	8,793	109
October	31,502	37,932	9.11	9.08	9,510	132	9,446	109
November	42,881	47,415	10.90	9.08	11,379	132	10,945	109
December	56,914	56,898	13.44	9.08	14,033	135	12,266	109
January	66,375	66,381	9.06	9.08	9,461	134	10,779	109
February	76,228	75,864	9.44	9.08	9,853	132	8,020	109
March	84,990	85,347	8.39	9.08	8,762	130	11,392	109
April	84,990	94,830	0.00	9.08			11,665	109
May	84,990	104,313	0.00	9.08			9,246	109
June	84,990	113,796	0.00	9.08			5,055	109
TOTAL			81.41		84,990		109,918	

Total VSYS Achieved

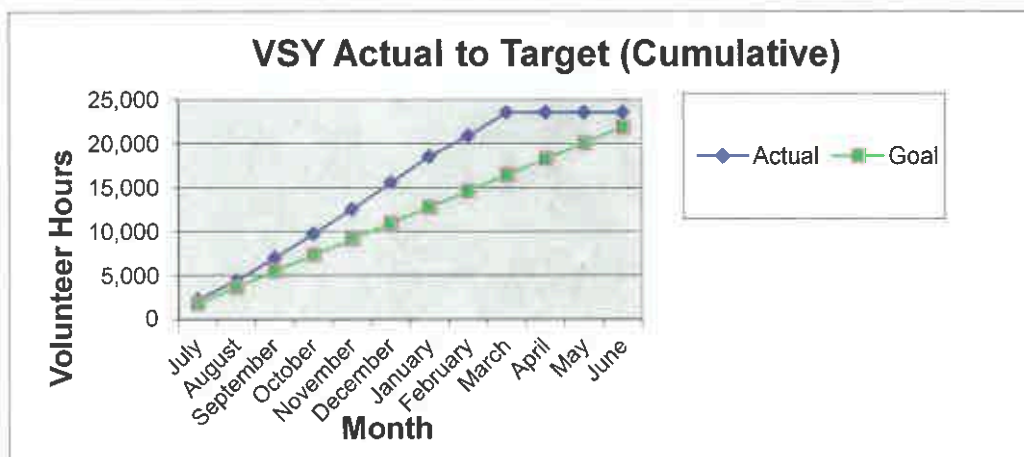


Project Name: Seniors Council Senior Companion Program

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

Month	Cumulative		Monthly		Monthly		Annual	
	Hours Actual	Hours Goal	VSYS Actual	VSYS Goal	Hours Actual	Vols. Active	FY 24-25 Actuals	VSYS Goal
July	2,283	1,827	2.19	1.75	2,283	30	1,837	21
August	4,405	3,654	2.03	1.75	2,122	30	1,608	21
September	7,016	5,481	2.50	1.75	2,612	30	1,909	21
October	9,731	7,308	2.60	1.75	2,715	31	2,055	21
November	12,534	9,135	2.68	1.75	2,803	31	2,504	21
December	15,557	10,962	2.90	1.75	3,023	32	2,614	21
January	18,567	12,789	2.88	1.75	3,010	32	2,159	21
February	20,894	14,616	2.23	1.75	2,327	32	1,643	21
March	23,563	16,443	2.56	1.75	2,669	37	1,989	21
April	23,563	18,270	0.00	1.75			1,585	21
May	23,563	20,097	0.00	1.75			1,959	21
June	23,563	21,924	0.00	1.75			1,688	21
TOTAL			22.57		23,563		23,547	

Total
VSYS
Achieved



9.A-2



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

Monthly Report to the Board of Directors – Community Foundation for San Benito County and the Seniors Council of Santa Cruz and San Benito Counties

Submitted by Corey Shaffer, Community Coordinator

Senior Services Planning and Volunteer Engagement

San Benito County, Seniors Council

For the Month of March 2026

Overview

March focused on expanding outreach, strengthening communication efforts, and continuing development of the countywide volunteer and community engagement infrastructure supporting older adults, individuals with disabilities, and residents across San Benito County.

Volunteer Program (SBCVolunteers.org)

- Continued engagement and support of participating agencies
- Ongoing promotion of volunteer opportunities across the county
- Monitoring volunteer sign-ups and responses to opportunities

Current Snapshot:

- 21 active agencies registered on the platform
- Continued volunteer sign-ups and engagement activity
- Some agencies are actively utilizing the system, with opportunity to expand consistent usage

Observations & Opportunities

- Volunteer engagement continues to grow steadily, though usage varies by organization
- Limited agencies are consistently tracking volunteer hours within the platform
- This reflects a broader challenge across volunteer systems, where organizations often use separate tracking methods

Next Steps / Focus Areas

- Increase outreach to agencies to encourage consistent platform use
- Provide guidance on volunteer tracking and engagement
- Continue expanding participating organizations and opportunities
- Leverage presentations and events to grow volunteer participation

Communications & Outreach (Seniors Connect Newsletter)

March 2026 Newsletter Performance:

- 338 emails sent
- 211 opens (64% open rate)
- 45 clicks (14% click rate)
- 8 bounces (2%) | 1 unsubscribe (1%)

Social Media Promotion:

- 166 views
- 8 reactions | 1 share

Overall Email Performance (Past 12 Months):

- 5,919 emails sent
- 56% average open rate (above industry average)
- 296 total clicks

Strong engagement continues, with traffic driven to SBCVolunteers.org and key resources.

9. C-2

Community Outreach & Marketing

- Participated in a countywide direct mail campaign (“Hollister Spotlight”) reaching approximately 10,000 households
- Promoted SBCVolunteers.org, volunteer opportunities, and community resources
- Included QR codes and links to drive engagement and awareness

This effort expanded outreach beyond digital channels and increased visibility within the broader community.

Community Engagement & Partnerships

- Ongoing collaboration with local organizations to expand volunteer participation
- Supporting community initiatives that align with engagement, leadership development, and resource awareness

Resource Fair & Volunteer Recognition Event (Planning)

- Participating in planning efforts for a San Benito County Resource Fair & Volunteer Recognition Event
- Event focus includes:
 - Connecting residents to volunteer opportunities
 - Highlighting local nonprofit programs and services
 - Recognizing community volunteers
- Next Planning Meeting:
Friday, April 10 (following the Long-Term Care/Aging Commission meeting)

This initiative supports broader community engagement and volunteer recognition efforts across the county.

Upcoming Activities & Presentations

- April 18, 2026 – Tabling at the Caregiver University Conference
- April 23, 2026 – Supporting outreach for the San Benito Leadership Institute Info Night
- May 2026 – Presentation to the San Benito County Business Council
- June 2026 – Presentation with Behavioral Health



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 March 2026 Report

2026 Tax Season 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 services at senior home facilities).
- 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)*.

Ad-Hoc Events in March*

1. Davenport Resource Center
2. Brookdale Senior Living Scotts Valley
3. La Posada Senior Retirement Community Santa Cruz

Appointments are taken by calling **831-724-2606** or emailing projectscout@seniorscouncil.org, or in person at those sites that help with appointments*.

Project SCOUT March Tax Production Totals

Project SCOUT Volunteer Income Tax Assistance Tax Preparation Totals:

- Number of Federal returns prepared – 1054
- Primary or secondary 60 years old or older – 561
- Average income of those serviced – \$30,109.00
- Dollar Amount of Federal refunds including credits – \$1,117,117.00
- Dollar Amount of State refunds including credits – \$268,146.00

Dollar Amount of TOTAL refunds – **\$1385,263.00**

Total money back in the wallets of our clients, including average return cost of \$240.00 – **\$1638,223.00!**

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, 0 SBC)
- Number of clients assisted with Calfresh in Santa Cruz County – 3
- Number of clients assisted with Calfresh in San Benito County – 0

March 2026 Recap

Challenges:

As in prior years, we have gotten massive amounts of requests for services that we have not been able to fully attend to. Having sites that provide a hybrid appointment plus walk-in service has helped but not everyone is aware of the option.

Some of our clients with difficulties with banking are having their refunds delayed by months due to the IRS's pursuit of going fully to direct deposit by next year. Clients are coming to our sites wishing for us to change information on their returns to direct deposit which we are not able to, and this same population many a time do not possess the access to open an account with the IRS to do so on their own, meaning that their only option is to wait for months to receive a paper check.

Best Practices:

Having 39 certified volunteers at 12 weekly sites, as well as supporting monthly and ad hoc events has allowed us to not serve more per outing, as well as employing a hybrid appointment + walk-in service at some of our sites allowing us to help more.

Project SCOUT is currently looking at employing a client-facing appointment service that will allow anyone to set up their own appointment from a smart-phone or computer at our partner sites or from home.

Recently we had a client who is a single mother with 3 dependents. She had received a refund of \$3,000 plus dollars, but after careful review and accessing all the possible credits for a Head of Household mother with dependent kids, she is receiving over \$10,000.00 from the IRS and FTB. She is one happy Project SCOUT client!

Library Tech Help turns confusion into confidence

Free program at county library helps residents gain control of their devices

BY STAFF REPORT - March 24, 2026



Hollister resident Hermina Flores, left, gets help with her cell phone from Tami Aviles during Tech Help at the San Benito County Free Library, March 17. Photo: Robert Airoidi

For many people, the devices in their pockets and on their desks can be as frustrating as they are useful. At the San Benito County Free Library, however, a team of patient staff members and dedicated volunteers is helping bridge the digital divide – offering free one-on-one assistance to residents with questions about laptops, tablets and smartphones, and turning confusion over technology into confidence.

During the late morning of March 17, Tami Aviles, John Miranda and Leanne Oliveira were stationed in a room off the entrance with laptops at hand, ready to help anyone who needed some assistance.

Hollister resident Hermina Flores came in needing help navigating how to scan from an app on her phone and how to obtain and print a list of her prescriptions. Aviles, president of the Santa Cruz and San Benito counties Seniors Council and a member of the Friends of the San Benito County Free Library, aided Flores in her quest to learn more.

“This helps,” Flores said. “Now I understand what’s what. I learned some stuff today.”

Aviles said the free program began as a partnership between the Seniors Council and the Library. Now in its second year, the library has taken over the running of the program.

“Our goal is inclusion, not isolation,” Aviles said.

Miranda said each session is different.



San Benito County Free Library office assistant and IT Tech John Miranda helps Hermina Flores with her cell phone from Tami Aviles during Tech Help at the library, March 17. Photo: Robert Aioldi

“Sometimes there’s a lot of people who need help and we need more tech help, and sometimes it’s really slow,” he said. “But I think this is a great program.”

By the end of the session, what began as a handful of questions about apps, passwords and printers had turned into a small room full of quiet victories – screens understood, settings adjusted and a little more confidence gained. For library staff and volunteers, those moments are the point: helping neighbors navigate the digital world one question at a time.

The next free Tech Help session takes place 10:30am-noon on April 21 at the San Benito County Free Library, 470 Fifth Street, in Hollister.

For more information, visit sbcfl.org.

STAFF REPORT

A staff member wrote, edited or posted this article, which may include information provided by one or more third parties.

NEWS

Supervisors gather community input for library expansion

County applying for \$3.6 million grant to include funding for social projects

by **Juan Pablo Perez Burgos**
March 20, 2026



San Benito County Staff collecting signatures for a state grant application on March 17. Photo by Juan Pablo Pérez Burgos

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

Four years after San Benito County secured a \$10 million state grant to expand its library, officials held a public hearing on March 17 to gather input on the project, along with two social programs. More than a dozen people spoke, calling for the county to consider programs including the arts, youth, seniors and the unhoused.

The hearing was a required step in the county's application for a new \$3.6 million grant that would help ensure the library expansion moves forward, County Executive Officer Esperanza Colio Warren said.

"It is important that your voices are heard about what programs or projects you believe are needed in the community," Colio Warren told the public.

The new grant, Colio Warren said, would help protect the library expansion against rising construction costs. While its final cost remains uncertain, she argued that costs have risen amid years of inflation and an unpredictable economy.

"Even though they did an escalation percentage, the economy has changed very much lately, especially under the current circumstances," Colio Warren said.

The library expansion—which requires a \$5 million county match on top of the \$10 million state grant—has been delayed as county officials grappled with a tight budget and scrambled to decide where to place it. A few weeks ago, officials determined they would expand the library at its current location rather than move it elsewhere.

Supervisor Kollin Kosmicki urged county staff to look for ways to control the costs and, if the grant is won, try to spend less than the \$3 million, in order to invest more in social programs.

"I'm frankly concerned about the escalation of the library budget and the fact that we're not reining that in," Kosmicki said. "We're not building a 25,000-square-foot, 40,000-square-foot building. We're renovating a relatively small building."

"Our library is more than just a place for books," County Librarian Austin Curtis said. "It's a community hub for the residents of San Benito County. It's one of the only meeting places that provides an accessible space and essential services where members can gather, connect, learn and access resources that support their lives."

The application requires public hearings as part of the process. More than a dozen speakers addressed the board and those who spoke, as well as other attendees, were asked to sign a sheet documenting public input that will be submitted to the state. The final application will be presented to the public and the supervisors on March 31, and county officials must submit it by April 3.

Of the \$3.6 million grant, the county has proposed directing \$3 million to the library and \$600,000 to two social programs.

The first proposal was to fund after-school and summer activities for low-income children and youth. Deputy Director of Community Services and Workforce Development Enrique Arreola told the board the program is expected to serve more than 120 young people.

The remaining \$300,000 would support operations at the H.O.M.E. Resource Center, the county's only homeless shelter. The shelter, which can house up to 56 people, operates around the clock during the winter months and is open from 5 p.m. to 8 a.m. in the summer. Operations costs are between \$500,000 and \$600,000 a year, Arreola said.

"It's been quite a struggle securing funding on an annual basis," Arreola said. "There are operations, utilities and repairs. So, the worst-case scenario is that if we don't apply for and secure these funds, the operations of the shelter could look different."

Community members at the meeting urged the supervisors to broaden the scope of social programs. Former Hollister councilmember Mickie Solorio Luna and former San Juan Bautista councilmember Cesar Flores asked that arts and music be included in the youth programs.

Wayne Norton, vice president of the Board of Directors for the Seniors Council of Santa Cruz and San Benito Counties, asked for seniors to be included. He noted that their Meals on Wheels program served 145 seniors in January alone, delivering nearly 3,000 meals. Still, 47 San Benito County seniors remain on the waitlist for food assistance.

"By addressing this waiting list, we are not just providing food," Norton said. "We are preventing malnutrition and reducing the likelihood of costly emergency room visits."

Seniors Council Executive Director Clay Klempf suggested the county reframe the application to cover food and shelter broadly, rather than limiting it to youth and the unhoused, which he argued would allow seniors to qualify.

“That will give us the flexibility to meet the greatest need for all the populations,” Klempf said.

He also recommended the application should reference Gov. Gavin Newsom’s Master Plan for Aging to earn additional points with the state. “If we put in references to feeding older adults and tying it with the state’s Master Plan for Aging, I think that will boost everything for all of us,” Klempf said.

The board concurred with the public speakers on broadening the scope of the social programs. “Food and shelter are going to be No. 1,” said Supervisor Mindy Sotelo.

Colio Warren told the supervisors she would work with the county’s Health and Human Services Agency in the coming weeks to complete the application and present a final version in two weeks.

We need your help. Support local, nonprofit news! BenitoLink is a nonprofit news website that reports on San Benito County. Our team is committed to this community and providing essential, accurate information to our fellow residents. Producing local news is expensive, and community support keeps the news flowing. Please consider supporting BenitoLink, San Benito County’s public service nonprofit news.

ALSO ON BENITOLINK.COM

Hollister council
dissolves besieged

2 days ago · 2 comments
Hollister council dissolves
besieged department after
public outcry

Health Care District
considers raising

a month ago · 4 comments
Health Care District
considers raising bonus
terms for its CEO

COMMUNITY OPINION:
San Benito County

3 days ago · 2 comments
COMMUNITY OPINION: San
Benito County deserves
serious leadership on ...

VTA delays Hwy
route studies af

2 months ago · 2 cor
VTA delays Hwy 1!
route studies after
Benito County opp



Featured Obituaries

Search Obituaries by Name



POWERED BY



Submit an Obituary



Rev. Herb Schmidt

OBITUARY

The Rev. Herb Schmidt died peacefully of natural causes, surrounded by his loving family, a couple of days before Valentine’s Day. Having lost his beloved wife of 67 years, Grace, a couple of years prior, we find comfort in knowing they are together again.

In his last days, the family mentioned how much he would be missed, to which he replied, “You have it backwards – when I leave, I am going to miss all of you!” A profound twist of thought.

He will be remembered as a gentle, kind, loving husband, father, grandfather, and courageous Campus Pastor who worked for issues of Justice

Share this obituary:



Birth: 1930

Death: 2026

and Peace for ALL throughout more than 60 years of ministry.

Pastor Schmidt was born in Jefferson City, Missouri, on August 7, 1930, to Henry T. and Bertha Schmidt. He grew up working on his father’s and

grandfather's truck garden and attended parochial school at Trinity Lutheran Church, where very early on he decided to become a pastor.

His education continued at St. Paul's Academy, a high school preparatory school of the Lutheran Church-Missouri Synod. He graduated from St. Paul's College, Concordia, Missouri, in 1950. He continued his preparation for ministry at Concordia Seminary in St. Louis, Missouri, graduating in 1955.

In July 1956, he married Grace Mae Kitzman of Coral Gables, Florida, his lifelong partner for 67 years.

He began his ministry at Concordia College in Oakland in June 1955 and served there until 1960, when he accepted a call to Messiah Lutheran Church in Santa Cruz. During the 1959-1960 school year, he also served as Interim Pastor at University Lutheran Chapel in Berkeley. He was ordained at Zion Lutheran Church in Oakland, where he served as Pastoral Assistant while teaching at Concordia.

While serving at Messiah Lutheran, he was instrumental in starting Mt. Calvary Lutheran Church in Soquel.

In 1968, Pastor Schmidt accepted a call to serve as Campus Pastor at the University of California, Santa Cruz, and as Coordinator of Campus Ministry for the California, Nevada, and Hawaii District of the LCMS. From 1960 to 1970, he served on the Board of Directors for the California and Nevada District of the LCMS as Youth Chairman.

As the first Campus Pastor at UCSC, he helped establish the University Religious Council, which remains in operation today. Together with faculty colleagues, he also helped start the Religious Studies program at UCSC.

In 1978, he accepted a call to serve as Lutheran Campus Pastor for the ALC, LCA, and LCMS at the University of Arizona in Tucson. In 1986, Pastor Schmidt joined the AELC to accept a position as Lutheran Campus Pastor at Stanford University and Pastor of University Lutheran Church in Palo Alto. He officially retired from full-time service in 1998.

In addition to his pastoral responsibilities in Santa Cruz, Pastor Schmidt became very active politically in the Civil Rights and Anti-War movements. He was involved in closing the local draft board, helping many conscientious objectors avoid service in Vietnam, taking part in demonstrations, being arrested, and assisting students in becoming involved in local politics.

In 1970, together with his friend Paul Lee, other faculty at UCSC, campus ministers, and community leaders, he helped form the University Services Agency (USA). USA started the Whole Earth Restaurant, the Campus Day Care Center, the Food and Hardware Co-op, the Youth Hostel, Community Switchboard, and many other community service nonprofits.

USA continues today. It has sponsored an AmeriCorps program, sent more than 2,000 computers to Cuba for use in rural medical clinics, supported the Committee for the Advancement of Religious Studies at UCSC, and aided many homeless outreach projects.

He was also instrumental in helping develop the Bicentennial Committee, which assisted progressives in being elected to the City Council and Board of Supervisors. He served as one of the Ombudsmen who established Operation Wilder, helping save Wilder Ranch as a State Park and preserve Lighthouse Field from becoming a convention center.

Even after leaving Santa Cruz, he remained deeply involved in Peace and Justice ministries — in Central America through the Sanctuary Movement, in the West Bank and Gaza with Mid East Witness, and in Haiti with Tet Ansam, a student volunteer corps he helped start while serving at Stanford.

In retirement, he served as Interim Pastor at Christ Lutheran Church in Aptos; St. Philip's Lutheran in Carmel Valley; St. Stephen's Lutheran and Messiah Lutheran in Santa Cruz; and as Pastoral Assistant at Grace Lutheran in Palo Alto. He also completed four tours as a Volunteer in Mission with the Protestant Church in Bali.

After retirement, he served two full terms as Dean of the ELCA Monterey Conference. During this time, he also worked with the Resource Center for

Nonviolence on issues of Middle East peace.

During his retirement years, he enjoyed gardening with his wife, Grace, spending time with their grandchildren, and traveling both domestically and internationally – including time spent with their son Richard and his family in Costa Rica, where they provide surf and yoga retreats in the winter months.

He will forever be remembered for his extraordinary gratitude and blessing circles he led before meals with family and friends.

He is survived by his four sons: Conrad (Vicki), David, Richard (Marisa), and Raymond (Karyn); and his seven grandchildren: Konrad, Carlo, Johann, Courtney, Dominic, Richie, and Makai – all living in Santa Cruz.

He was preceded in death by his brother, Dr. Stephen Schmidt of River Forest, Illinois; his sister, Henrietta Kieschnick of Baton Rouge, Louisiana; and his beloved wife, Grace Mae Schmidt.

A Memorial Service will be held for Pastor Herb Schmidt on April 18 at 1:00 p.m. at Messiah Lutheran Church, 801 High Street, Santa Cruz, California.

In lieu of flowers, the family requests that donations be made to the United Services Agency.

REQUIESCAT IN PACE

[Click here to Send Flowers](#) to the family of Herb.

Published in: 📰 Santa Cruz Sentinel from March 1, 2026

10.3-4