



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, May 21, 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)

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Find your local number: <https://us02web.zoom.us/j/81931049538>

AGENDA

- 10 a.m. 1. Welcome, Call to Order and Introductions
2. Additions & Deletions to the Agenda
3. Receive Announcements from Board Members
4. Comments from Members of the Public on Items Not on the Agenda
- 10:10 5. Approve minutes of the April 2026 Board Meeting
- 10:15 6. Committee Reports
- A. Finance Committee
 - a. FY 2026-27 Agency Budget
 - b. Adoption of 2026-27 Staff Salary Schedule
 - c. Budget Cuts/Staff & Benefit Reductions

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

- B. Executive Committee
- C. Resource Development Committee
- D. Nominating & Board Development
- E. Advocacy Committee
 - a. State & Local Funding
 - b. Candidate Forum(s)
 - c. California Senior Legislature Report

- 11:25 7. 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 8. Program Reports (written)
- A. Foster Grandparent/Senior Companion Program
 - B. Aging & Disability Resource Connection (ADRC)
 - C. Volunteer Coordination Project
 - D. Project SCOUT
- 11:50 9. Miscellaneous Correspondence & Other Items
JUNE meeting in Hollister
- 12 Noon 10. Adjourn

Next Meeting:
Thursday June 18, 2026
10 am to 12 Noon
San Benito County Epicenter Community Room
440 San Benito Street, Hollister, CA

Questions, Clarifications or Additional Information:

If you have a question or wish clarification or additional information about any agenda item or attached materials, please telephone Seniors Council Executive Director Clay Kempf at 688-0400 ext. 115 before the meeting. If you get voicemail, please leave a detailed message so that a response can be made.

Distribution of Materials:

If you have information to share with members of the Board, a table or other suitable space will be provided on which you may make it available. It is the wish of the Executive Committee that meetings not be disrupted by distribution of paperwork or other items.

Accessibility:

This organization attempts to make meeting content understandable in languages other than English. All Meeting rooms are accessible for people with disabilities. If you wish to discuss reasonable modifications or accommodations for language or disability, please contact the Seniors Council office at 688-0400 at least 48 hours before the meeting.

Seniors Council Mission Statement

It is the mission of the Seniors Council to enable older persons to function with independence and dignity in their homes and in the community to their fullest capacity.

Area Agency on Aging Mission

To provide leadership in addressing issues that relate to older Californians; to develop community-based systems of care that provide services which support independence within California's interdependent society, and which protect the quality of life of older persons and persons with functional impairment; and to promote citizen involvement in the planning and delivery of services.



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SENIORS COUNCIL BOARD OF DIRECTORS

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

April 16, 2026

MINUTES

BOARD MEMBERS PRESENT:

Tami Aviles (President); Wayne Norton (Vice-President); Jane Schwickerath (Treasurer); Pam Arnsberger; Mickie Luna; Lisa Berkowitz; Connie Padron; Mary Lou McKenney

BOARD MEMBERS EXCUSED:

Gwen Yeo; Antonio Rivas

STAFF PRESENT:

Clay Kempf (Executive Director); Zach Johnson (Administrative Services Officer); Corey Shaffer (Community Coordinator); Leanne Oliveira (ADRC); Hilary Minugh (Fiscal Specialist)

1. Welcome, Call to Order and Introductions

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

2. Additions & Deletions to the Agenda

Pam added one item under Miscellaneous.

3. Receive Announcements from Board Members

Wayne reported on testimony to SBC BOS, requested funding included in CBDG.

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

None present.

5. CONSENT AGENDA

Wayne noted that DOHN Larson's name was misspelled.

MOTION, Arnsberger/Norton, to approve minutes of March 2026 Board Meeting. PASSED.

6. Committee Reports

1. Finance Committee – met on April 9th and reviewed all reports.

- a. Agency-wide Profit & Loss – Jane referred to 6.A-1. Serious deficits in several programs. Without more income we are facing reductions. Reserves remain healthy; no formal policy other than program directives from several years ago. Program Directors are meeting regularly with staff to explore all options; more revenue, staff/hours reductions, cutting benefits, etc. Finance Committee moving to

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5-1

monthly meetings to assist budget planning (next May 14th at 10:30 AM); next RDC meeting on May 5th at 10 AM.

Discussion of desired program reserves and Board involvement.

Lisa noted that in March an anonymous donor gave \$25K for Senior Companion Program through Susan True, not reflected on this P&L.

- b. Adoption of Audit Clearinghouse Policy – Clay referred to 6.A-5. AmeriCorps requested Corrective Action Plan due to late submission, including recommendation for policy to be adopted. Spells out steps, responsibilities, and timeline on checklist. **MOTION, Arnsberger/Schwickerath**, to adopt Audit Clearinghouse Policy as proposed in packet. **PASSED**

2. Advocacy Committee –

- a. State & Local Funding – Wayne reported AB 2135 addresses concerns that fines against SNFs are routinely waived. Also reported on efforts to lobby elected officials AND their key staff, continuous process.

Clay said AB 2135 has amended, switch our position to support.

Discussion of MPA presentation in Scotts Valley, now moved to June for pacing.

Further discussion of MPA Governance Body history and trajectory.

MOTION, Arnsberger/Norton, to adopt recommendations of Advocacy Committee on legislation to support, including amended AB 2135. **PASSED.**

Reminder that Justin Cummings supports writing a letter declining interest in AAA takeover.

Clay reported on recent meeting with SCAN Foundation, seem to be in alignment on major issues with other AAAs, i.e. need for independent metric for basic costs of a AAA.

- b. Candidate Forum(s) – Zach updated on current plans and proposed dates and venues. Having difficulty contacting SCC candidates and requested help.
- c. California Senior Legislature – Mark Hucklebridge has applied to be Assemblymember and is running against Antonio Rivas. Advisory Council is electoral body.

3. Executive Committee – Met on April 9th, mostly already discussed.

4. Nominating & Board Development – Pam said Gwen will be stepping down after this round.

5. Resource Development Committee – 6.E-1 has report, including action items and elevator pitches from program directors. Discussion of various outreach strategies, including tea ‘parties’ and (paid?) senior housing guide.

7. 2024-28 Area Plan Update

Update must be submitted by end of May and requires BoD approval. Objectives with a “C” are Coordination, funded by IIIB Direct Services, and require CDA approval to change.

MOTION, Arnsberger/McKenney, to approve recommended updates to the 2024-28 Area Plan. **PASSED.**

8. Executive Director’s Report

1. Budget Shortfalls – discussed previously.

2. Agency Operations – Proposed Federal budget holds most of OAA harmless; cuts to native American and senior employment funding. AmeriCorps once again slated for elimination. FGP/SCP grant applications have been submitted.

Connie said that of the two vehicles used by Jovenes de Antaño one was purchased using

CBDG and other (in part?) by Health Trust. Recap of vehicle history and JdA's arguments.
May involve CDA if not turned over.

3. SB 1249 & CDA's 2030 Plan – CDA trying to define 'unit of local government'. Lisa noted many RFPs are up again in 2028.
4. MPA Local Playbooks – discussed previously.

9. Program Reports (written) –

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

10. Miscellaneous Correspondence & Other Items

None.

11. Adjourn

The meeting was adjourned at 12:08 PM.

Next Meeting: May 21, 10 a.m. – 12 Noon

- May meeting in Watsonville, June meeting in Hollister

Minutes prepared by: Zachary Johnson



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Date: 5-15-26

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: May Finance Committee Meeting

BACKGROUND

Our Finance Committee met this month to discuss the pending 2026-27 projected budget deficit, and explore alternatives to reduce our costs or enhance revenue to address the expected deficits.

Included in your packet is a detailed agency-wide budget. Operating under our current model, we are projected to have a deficit of about \$154,000, due to a combination of shrinking revenue and increasing costs.

DISCUSSION

Staff have been exploring options since our last Finance Committee, and Fiscal staff have provided detailed information of viable options, as well as eliminating other scenarios that further exploration has shown to be counter-productive. After detailed discussion and analysis, the Finance Committee agreed on four items, with others remaining under discussion. The agreements include:

- 1) Adopt our current salary schedule with no Cost-of-Living Allowances (COLA). This will be our second year in a row of no COLAs
- 2) Freeze all salaries at the current level; no staff will receive merit/step increases in the coming fiscal year.
- 3) Temporarily reduce our agency's 5% contribution to employee retirement accounts, in an amount to be determined.
- 4) Reduce agency health benefits from Gold/Zero Deductible plans to Gold/750 Deductible plans, in response to a \$23,000 increase in healthcare. The switch in plans will save approximately \$7,000 per year.

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6.A-1

Exploration of other health care options continues, and if a more cost-effective option is discovered by the Board meeting, it will be pursued.

Discussed in detail and agreed upon is the need to reduce staff hours. Not agreed upon is the extent and methodology for doing so. The primary options were for a 10% reduction of hours to everyone, or laying off a full-time AAA and/or Admin staffer. The 10% reduction would save the agency about \$55,000; laying someone off would result in a savings of about \$100,000 with the included reduction of benefit expenses.

The projected deficit budget already includes a reduction of hours of direct service staff working in San Benito County, and they would NOT be part of the additional 10% cuts. Also, no staff that currently receive health benefits would have their hours dropped below the 30 hours per week minimum needed to receive benefits.

The 10% across the board cut, combined with the four agreed upon actions, will still leave a deficit of approximately \$50,000.

In recent years, we have added additional staff as services have expanded with an influx of both new dollars (e.g., ADRC, Nutrition Augmentations), COVID funds, and providing Information & Assistance and Case Management directly instead of contracting out.

We have also overcome a nearly \$500,000 deficit and built up about \$650,000 in agency reserves, using a variety of cost-savings techniques and using unrestricted funds wisely and frugally. We intentionally and strategically cut corners wherever possible despite the influx of new funding - knowing it wouldn't last forever.

The Executive Committee of the Board of Directors discussed all of these details and more during their meeting. The Executive Committee's recommendations will be reported on as part of the Board discussion; they include the four Finance Committee recommendations but include greater detail along with additional actions.

6.A-2

SENIORS COUNCIL BOARD PROJECTED AGENCY

BUDGET FOR FISCAL YEAR 2026/2027

AGENCY WIDE

5/13/2026

Spec. Proj.

SCOUT

SCP

FGP

AAA

ADMIN

WIDE

INCOME	(ADRC/IIIB)	(35/TCE/VITA)	(FED/NON FED)	(FED/NON FED)	(LOCAL/STATE/FED)	AAA	ADMIN	WIDE
FARMERS MARKET NUTRITION PROGRAM								
GRANTS REC'D (Income) - Ca Dept. of Aging								
Federal								
IIIB - Supportive Svc.	48,000	17,700	-	-	15,000			15,000
C1 - Congregate Nutrition	-	-	-	-	284,170			349,870
C2 - Home Delivered Meals	-	-	-	-	414,624			414,624
IIID - Direct Services	-	-	-	-	373,447			373,447
IIIE - Family Caregiver	-	-	-	-	22,851			22,851
VIA - Supportive Svc.	-	-	-	-	148,896			148,896
VIIB - Elder Abuse	-	-	-	-	37,140			37,140
Federal Administration	-	-	-	-	4,159			4,159
	-	-	-	-	168,817			168,817
State								
Ombudsman Initiative	-	-	-	-	130,793			130,793
C1 - Congregate Nutrition A/P	-	-	-	-	110,969			110,969
C2 - Home Delivered Meals A/P	-	-	-	-	437,283			437,283
NM - Nutrition	-	-	-	-	-			-
OM- Supportive Services	-	-	-	-	-			-
ADRC	198,700	-	-	-	-			198,700
State Administration	-	-	-	-	100,000			100,000
GRANTS REC'D - OTHER INCOME								
CNCS FGP GRANT	-	-	-	979,412	-			979,412
CNCS SCP GRANT	-	-	264,656	-	-			264,656
CAL FRESH	-	41,471	-	-	-			41,471
HICAP	-	-	-	-	311,510			311,510
HICAP - Admin	-	-	-	-	27,117			27,117
MIPPA	-	-	-	-	42,605			42,605
MIPPA Admin	-	-	-	-	4,733			4,733
IRS - VITA	-	51,000	-	-	-			51,000
IRS - TCE	-	5,000	-	-	-			5,000
DEPT TRANSPORTATION 5310	-	-	-	-	-			-
TOTAL GRANTS REC'D	246,700	115,171	264,656	979,412	2,634,114		-	4,240,053
LOCAL MATCH RECEIVED-JURIS.								
City of Capitola	-	5,000	-	-	-			5,000
City of Hollister	-	-	-	-	9,500			9,500

6.43

6.A-4
 SENIORS COUNCIL BOARD APPROVED AGENCY BUDGET
 FOR FISCAL YEAR 2025/2026

	5/13/2026	Spec. Proj. (ADRC/IIIB)	SCOUT (3B/TCE/VITA)	SCP (FED/NON FED)	FGP (FED/NON FED)	AAA (LOCAL/STATE/FED)	ADMIN	AGENCY WIDE
INCOME								
City of Santa Cruz	-	-	-	-	-	-	-	-
City of Scotts Valley	-	-	-	-	-	-	-	-
City of Watsonville	-	-	-	-	-	-	-	-
County of San Benito	-	-	-	-	-	32,780	-	32,780
County of Santa Cruz	-	23,750	-	-	-	131,000	-	154,750
LOCAL MATCH RECEIVED - OTHER								
COMMUNITY								
FOUNDATIONS	-	55,000	-	35,000	-	-	-	90,000
IN KIND DONATIONS	-	-	-	-	-	-	-	-
MISC CASH DONATIONS	-	-	-	1,000	-	-	-	1,000
MISC VOLUNTEER RECOGNITION	-	-	-	-	-	-	-	-
UNITED WAY	-	-	-	-	-	-	-	-
Monterey County	-	-	-	-	-	-	-	-
San Benito County	-	-	-	-	-	-	-	-
Santa Cruz County	-	5,000	-	-	-	-	-	5,000
TOTAL LOCAL MATCH								
	-	88,750	-	36,000	-	173,280	-	298,030
OTHER INCOME								
ADMINISTRATIVE FEE (12%) *	-	-	-	-	-	-	442,106	442,106
PROGRAM DEVELOPMENT	-	3,824	40,970	100,000	-	-	-	144,794
INTEREST EARNED	-	-	-	-	-	-	900	900
OTHER INCOME - NIAC & SAMS	-	-	-	-	-	5,000	-	5,000
FUNDRAISING / DONATIONS	-	6,369	-	-	-	-	450	6,819
TOTAL OTHER INCOME								
	-	10,193	40,970	100,000	-	5,000	443,456	156,163
SHARE OF COSTS								
OTHER	-	-	-	-	-	-	-	-
MONTEREY COUNTY BEHAVIORAL HEALTH	-	-	-	-	-	-	-	-
SANTA CRUZ COUNTY MENTAL HEALTH	-	-	-	-	-	-	-	-
TOTAL SHARE OF COST								
	-	-	-	-	-	-	-	-
TOTAL INCOME								
	246,700	214,114	305,626	1,115,412	2,812,394	444,806	4,695,596	

EXPENSE All items below in green are paid by Admir

SENIORS COUNCIL BOARD APPROVED AGENCY BUDGET
FOR FISCAL YEAR 2025/2026

5/13/2026

Spec. Proj. (ADRC/HIB) (3B/FYCE/VITA) (FED/INON FED) (LOCAL/STATE/FED) AGENCY WIDE

	Spec. Proj.	SCOUT	SCP	FGP	AAA	ADMIN	AGENCY WIDE
	(ADRC/HIB)	(3B/FYCE/VITA)	(FED/INON FED)	(FED/INON FED)	(LOCAL/STATE/FED)		
EXPENSES	-	-	-	100	25	75	200
RECORDS SHREDDING	-	500	-	-	125	1,500	2,125
MEETING EXPENSE	-	-	-	1,200	500	-	1,700
ADVERTISING & PROMOTION	-	-	-	-	-	-	-
BAD DEBT	-	-	-	-	-	-	-
BANK FEES & CHARGES	-	-	108	504	-	-	612
CONTRACTED SERVICES	-	-	-	-	-	-	-
AUDIT	250	-	900	5,200	13,000	8,600	27,950
CASUAL LABOR	-	250	-	400	200	500	1,350
CONSULTANTS	-	500	1,000	3,975	31,050	-	36,525
SUB CONTRACTORS	-	-	-	-	-	-	-
SYNERGY	-	-	-	-	9,575	-	9,575
TRANSLATION	-	-	1,200	5,840	-	-	7,040
VENDORS	-	-	-	-	-	-	-
CRIMINAL RECORDS CHECK	-	-	400	1,279	-	-	1,679
DISASTER KIT	-	-	-	-	-	-	-
ELECTRONIC FILING	-	2,500	-	-	-	-	2,500
EQUIPMENT	-	-	-	-	-	-	-
EQUIPMENT- EXPENDABLE	-	1,000	-	-	500	-	1,500
EQUIPMENT RENTAL	100	-	1,200	-	-	775	2,075
EQUIPMENT RENTAL	-	875	800	3,960	3,276	8,911	11,428
FEES	-	-	-	-	-	-	-
GRANTS PAID (Expense)	4,400	-	-	-	2,314,097	-	2,318,497
INSURANCE - CIMA (volunteers)	-	-	281	1,373	-	-	1,654
INSURANCE - GENERAL LIABILITY	1,200	-	840	3,180	400	1,049	6,669
INSURANCE - GENERAL LIABILITY	449	1,441	316	-	1,237	3,443	3,443
MAINTENANCE & REPAIRS	3,200	3,000	3,600	7,920	5,900	9,500	33,120
MAINTENANCE & REPAIRS	-	-	-	-	-	-	-
MEETING SUPPLIES	-	-	-	-	-	-	-
MEMBERSHIPS	-	100	313	400	10,000	450	11,263
MEMBERSHIPS	-	-	-	-	-	-	-
OFFICE FURNITURE	-	1,000	-	-	-	-	1,000
OFFICE SUPPLIES	500	2,000	2,172	5,880	1,000	10,000	21,552
PERSONNEL - BENEFITS	6,645	6,000	1,967	11,354	8,761	4,971	39,699
403b							16500

6. A - 1

SENIORS COUNCIL BOARD APPROVED AGENCY BUDGET
FOR FISCAL YEAR 2025/2026

5/13/2026

EXPENSES	Spec. Proj. (ADRC/IIIB)	SCOUT (38/TC/EAVITA)	SCP (FED/NON FED)	FGP (FED/NON FED)	AAA (LOCAL/STATE/FED)	ADMIN	AGENCY WIDE
403b							
HEALTH, DENTAL, VISION, LIFE	63,338	18,239	9,232	56,642	18,430	21,846	187,727
HEALTH, DENTAL, VISION, LIFE	2,223	439	4,197	14,159	27,523	48,541	48,541
WORKERS COMP INSURANCE	1,200	850	552	2,142	2,200	1,403	8,347
WORKERS COMP INSURANCE	-	-	-	123		123	123
PAYROLL							
P/R TAX EXPENSE	10,632	10,200	3,068	20,211	14,018	8,451	66,580
P/R TAX EXPENSE	1,318	643	1,084	5,203	9,642	17,889	17,889
PAYROLL - WAGES	132,904	120,000	39,336	227,085	175,227	99,424	793,976
PAYROLL - WAGES	15,506	7,935	13,893	58,466	118,786	214,586	214,586
POSTAGE	-	103	1,680	2,880	-	500	5,163
PRINTING & REPRODUCTION	500	320	204	2,400	200	85	3,709
SPACE COSTS							
JANITORIAL	-	750	150	1,100	1,150	1,400	4,550
OFFICE RENT	6,400	12,000	3,000	20,160	17,700	25,000	84,260
STORAGE RENT	-	-	-	1,200	-	1,500	2,700
TRAINING FACILITIES	-	-	-	400			400
UTILITIES	-	300	300	2,000	1,800	2,000	6,400
UTILITIES	-	-	-	-	-	-	-
STAFF RECOGNITION	-	-	876	-		1,200	2,076
SUBSCRIPTIONS & PUBLICATIONS	-	-	120	204			324
TELEPHONE	1,600	2,000	1,440	8,364	1,500	3,600	18,504
TRAINING FEES	1,500	500	650	500			3,150
TRAVEL-LOCAL	286	4,500	2,250	8,718	1,300	425	17,479
TRAVEL-LONG DISTANCE	-	-	1,400	2,000			3,400
VOLUNTEERS							
MEALS	-	500	18,885	71,380			90,765
PHYSICAL EXAM	-	-	560	2,100			2,660
RECOGNITION	-	900	2,540	13,080			16,520
SCP LEADER	-	-	600	-			600
UNIFORMS	-	-	315	1,635			1,950
TAX ASSISTORS	-	4,400	-	-			4,400
STIPENDS	-	-	87,696	455,184			542,880
COORDINATORS	-	1,000	76,400	-			77,400

66,900

24000

297,500

6.A-6

SENIORS COUNCIL BOARD APPROVED AGENCY BUDGET
FOR FISCAL YEAR 2025/2026

5/13/2026

EXPENSES	Spec. Proj. (ADRC/IIIb)	SCOUT (3B/TCE/VITA)	SCP (FED/NON FED)	FGP (FED/NON FED)	AAA (LOCAL/STATE/FED)	AGENCY	
						ADMIN	WIDE
TRAVEL	-	-	10,939	62,129	-	-	73,068
ADMIN INDIRECTS	-	253				253	253
PROGRAM EXPENSE SUB-TOTAL (a)	234,656	193,412	276,174	1,010,119	2,628,634	204,254	4,547,248
ADMIN EXPENSE SUB-TOTAL (b)	20,271	11,709	20,984	84,835	166,403	304,202	304,202
TOTAL PROGRAM EXPENSE a+b=c (c)	254,927	205,121	297,158	1,094,954	2,795,036	508,456	4,851,450
ADMINISTRATIVE FEE (d)	30,591	23,209	33,141	121,214	233,951	-	442,106
EXPENSE TOTAL a+d=e (e)	265,247	216,621	309,315	1,131,333	2,862,584	204,254	4,785,100
NET INCOME (total income-e)	(18,547)	(2,507)	(3,689)	(15,921)	(50,190)	(63,650)	(154,504)
							12% on program expenses less State A/P funding

If no changes are made, this is the projected budget for 2026/2027
Total personnel = \$1,387,924

6.A.8

2026-27 PROPOSED Salary Schedule (unchanged from previous year)

POSITION	Entry	Adopted by BoD:									
		2	3	4	5	6	7	8	9	10	
Executive Director	\$ 35.44	\$ 37.22	\$ 39.08	\$ 41.03	\$ 43.08	\$ 45.24	\$ 47.50	\$ 49.87	\$ 52.37	\$ 54.99	
AAA Administrator	\$ 27.20	\$ 28.56	\$ 29.99	\$ 31.49	\$ 33.06	\$ 34.72	\$ 36.45	\$ 38.27	\$ 40.19	\$ 42.20	
FGP/SCP Program Director	\$ 29.18	\$ 30.64	\$ 32.17	\$ 33.78	\$ 35.47	\$ 37.24	\$ 39.10	\$ 41.06	\$ 43.11	\$ 45.27	
Director of Programs & Special Projects	\$ 30.60	\$ 32.13	\$ 33.73	\$ 35.42	\$ 37.19	\$ 39.05	\$ 41.00	\$ 43.05	\$ 45.21	\$ 47.47	
Fiscal Officer	\$ 30.60	\$ 32.13	\$ 33.73	\$ 35.42	\$ 37.19	\$ 39.05	\$ 41.00	\$ 43.05	\$ 45.21	\$ 47.47	
Administrative Services Officer	\$ 29.14	\$ 30.60	\$ 32.13	\$ 33.74	\$ 35.42	\$ 37.20	\$ 39.06	\$ 41.01	\$ 43.06	\$ 45.21	
Fiscal Specialist	\$ 24.08	\$ 25.29	\$ 26.55	\$ 27.88	\$ 29.27	\$ 30.74	\$ 32.27	\$ 33.89	\$ 35.58	\$ 37.36	
Fiscal Assistant	\$ 21.85	\$ 22.94	\$ 24.09	\$ 25.29	\$ 26.56	\$ 27.89	\$ 29.28	\$ 30.74	\$ 32.28	\$ 33.90	
Project SCOUT Program Director	\$ 25.29	\$ 26.56	\$ 27.89	\$ 29.28	\$ 30.75	\$ 32.28	\$ 33.90	\$ 35.59	\$ 37.37	\$ 39.24	
Community Coordinator (SB Co. & Vols)	\$ 25.29	\$ 26.56	\$ 27.89	\$ 29.28	\$ 30.75	\$ 32.28	\$ 33.90	\$ 35.59	\$ 37.37	\$ 39.24	
Program Assistant (all programs)	\$ 17.42	\$ 18.29	\$ 19.21	\$ 20.17	\$ 21.18	\$ 22.23	\$ 23.35	\$ 24.51	\$ 25.74	\$ 27.03	
Program Coordinator/FGP/SCP/ADRC	\$ 21.50	\$ 22.57	\$ 23.70	\$ 24.89	\$ 26.13	\$ 27.44	\$ 28.81	\$ 30.25	\$ 31.76	\$ 33.35	
Program Specialist/Outreach Coordinator	\$ 19.91	\$ 20.91	\$ 21.95	\$ 23.05	\$ 24.20	\$ 25.41	\$ 26.68	\$ 28.02	\$ 29.42	\$ 30.89	

English/Spanish speakers receive \$1.00 per hour bilingual differential for bilingual required/preferred positions



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: 5-15-26

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: May Resource Development Committee Meeting

Highlights and Action

Our May Resource Development Committee continued its discussion of Board & Agency actions, highlighting the need for us to invest time and resources in expanding our very small donor base. To this end, it was decided to do several things, including:

1. 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, or to contact directly. Corey Shafer and Tami Aviles took the lead in designing the Tea Party card, and will be distributing them to our Board members.
2. Continue to develop methods and strategies for using current and future events (volunteer recognition, Senior Resource Fair, etc.) as easy steps to expand our donor base.
3. Consider allocating a portion of our reserves to provide staff hours to support Board fundraising and other promotional or fundraising activities

6.C-1



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Date: 5-10-26

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: Advocacy Committee Report

BOARD OF SUPERVISOR CANDIDATE FORUMS

Candidate forums for local Board of Supervisor races were held last Friday, May 8, at the Watsonville Senior Center, with candidates Tony Nuñez, Elias Gonzales and incumbent Felipe Hernandez all confirmed as participants. The forum went well and a recording will be on our website soon. Unfortunately, Supervisor Hernandez failed to attend, and has not contacted our office as to why. Jennifer Merchant, Executive Director of Grey Bears, did an outstanding job as moderator.

In San Benito County, candidates for the two seats will be participating today in a virtual forum. The plan to hold the forum at the Pauline Valdivia Community Center had to be cancelled, as the center has been closed for the past six weeks while the City conducts repairs. Martha's Kitchen will be holding a listening session for the forum at the temporary Dunne Park mealsite location. Incumbents Mindy Sotelo, Angela Curro, and challengers Peter Hernandez and Roxanne Stephens are all expected to participate. Philip Geiger of the Alzheimer's Association will moderate.

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 continue to be problematic to the ask, as they consistently point out that there are unspent nutrition funds allocated to AAAs from the 2022-23 state budget augmentation. The Department could explain 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. The

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6.E-1

impression is being given that millions of dollars are unspent and wasted, and it implies AAAs competence is questionable. 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 continues to shock me to see how unsupportive CDA is of their own network.

SB 1261 (Laird) successfully moved out of suspense and out of the Appropriations Committee, much to our delight. The bill is now "across the desk", meaning it is back in circulation and will be up for a vote by the legislative body. This bill provides up to two years relief from the California Department of Aging shutting down operating Aging & Disability Resource Connections (ADRC) if the AAA or the Independent Living Center (ILC) in the area is re-designated. The action is needed to avoid the defunding and shutting down of the ADRC of Santa Barbara & San Luis Obispo, and potentially the same in Ventura County, or in any location where the makeup of a AAA or an ILC might change. The bill language reads:

"(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."

SB 1249 AND CDA'S CALIFORNIA 2030 PLAN

Much of our advocacy time and efforts continue to focus on minimizing the potentially devastating impacts of CDAs implementation of their SB 1249 and California 2030 plan. Included in your packet are comments I sent to CDA regarding some of our IFF concerns via their public input process. The latest public input process, regarding the Instate Funding Formula (IFF) was slated to end at 5 pm on May 12th. Shockingly, legislative language to define this regulatory change entered was at 4 pm on the 12th, meaning they're not even respecting their own timelines, let alone the input of AAAs and other impacted parties.

6.E-2



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May 11, 2026

Dear Director DeMarois,

RE: The California Department of Aging's Proposed Intrastate Funding Formula Revisions

Dear Director DeMarois and Concerned Partners:

Thanks for the opportunity to provide input to the California Department of Aging's (CDA's) proposal to amend California's Intrastate Funding Formula (IFF) regarding Area Plan Allocations to Area Agencies on Aging. Having lived through the litigation and subsequent legislation that established the currently used IFF during the decade of the 1990's, and its nearly crippling impact on several AAAs around the state, I'd like to offer observations, concerns and suggestions regarding the Department's current proposal.

1) First of all, **any proposal that bases its changes on creating winners and losers is doomed** to have a negative impact on older adults throughout the state. With no new money at hand, the lack of a strategy to mitigate literally taking funds (and the resultant food and services that go with it) away from one group of needy seniors in order to care for another is irrefutably flawed. Such a proposal should only go forward if and when it is linked to new funding that ensures that no senior will lose services as a result of an administrative exercise.

1a) Should the CDA choose to ignore the loss of funding in some regions of California, the effort could be started by **reducing funding by no more than the average amount of unspent funds** in any given planning and service area (PSA). This will minimize or eliminate service losses for older adults with a PSA that is receiving reduced allocations.

2) We are tremendously disappointed that the CDA is proposing to increase the annual amount of unspent funds a AAA can retain, literally **DOUBLING** that amount from 5% to 10%. This **new clause rewards AAAs for not spending their funds, and punishes the AAAs that do spend their allocation**. This direction is completely backwards, and makes no sense whatsoever.

3) Currently, unspent funds beyond 5% of a AAAs baseline are redistributed to the entire AAA network using the IFF. All AAAs are eligible to receive these funds, regardless of whether or not they fully expended their baseline allocations. We like the new proposal that requires each AAA to meet a threshold percentage of spending in order to participate in this redistribution. However, we feel that threshold needs to be **95%** of baseline funds expended in order to participate in redistribution, rather than the proposed 90%. The 90% threshold merely exacerbates the problem by sending unspent funds back to the very same organizations that

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6.E-3

failed to spend the dollars originally! One-time only **funds should be awarded to the organizations that are using the monies in a timely manner, and not to those that fail to do so.** Hold AAAs to high standards, and award those AAAs that meet those standards rather than those that fail.

4) **Administrative baseline amounts** have long been a problematic area of underfunding. We strongly support CDAs proposal to provide each AAA with a \$100,000 annual administrative baseline with state general funds dollars, and increase the annual administrative baseline in federal dollars to \$150,000 (a \$100K annual increase). The balance of the administrative dollars would then be distributed as a percentage of federal funds awarded in each title.

4a) AAAs and CDA have long noted that administrative dollars do not realistically match the required administrative burden bestowed upon all AAAs, but especially small ones, and we feel **this aspect of the new formula is of the utmost urgency.** We recommend it be implemented no later than FY 2027-28. It also seems to be the least controversial aspect of the proposed IFF.

5) We note that the current administrative overhead minimums provide no reward for multi-county partnerships and efficiencies, but that should a single county separate, they would receive the same amount of baseline funding as the remaining multi-county AAA. This provides a financial incentive for AAAs to splinter rather than integrate. We would propose that the opposite also be true; that a county merging with an already-established PSA/AAA have its baseline allocation ADDED to the existing AAA being joined. **Collaboration and consolidation must be rewarded rather than punished** if we truly seek increased efficiency. Other strategies to reward collaborative efforts and multi-county AAA are strongly encouraged.

California's current IFF was borne out of legal action and took nearly an entire decade to resolve legislatively. The ensuing battles created a tremendous rift in the statewide and aging network, and wasted local, state, and legislative resources in a tug-of-war over finite funding. PSA-13 was arguably the hardest-hit AAA, with our funding being held to our 1984-85 levels for 30+ years. Ironically, the AAAs that were the primary beneficiaries to our frozen funding continually left hundreds of thousands and even millions of dollars unspent every year; often more than our entire annual allocation. I sincerely hope the CDA will review California's IFF history and do its utmost to not repeat the past. Already, Los Angeles County has approved filing a lawsuit over the new IFF. Let's avoid that if we can.

Changing the IFF, and changing it fairly while minimizing negative impacts, will be incredibly difficult. It is not something that can be resolved by a simple survey, but instead, requires extensive conversation, exploration, and creativity. Patience and willingness to compromise and do what is best for the greater good are essential components of resolving this challenge in a non-litigious manner. Recognition and mitigation to unintended consequences, to unintended harm to already vulnerable older adults, HAS to be part of our strategies and our actions.

I sincerely hope the CDA will consider my comments in the spirit of both improving the proposed (and the existing) IFF, and doing so in a manner that results in a stronger network of AAAs, and in a CDA that is viewed as knowledgeable, compassionate, and strategic. Unfortunately, the current direction does none of that, and seems to be an exercise in compliance rather than positive impact.

6.E-4

If we can't come together on something as basic as improving our service delivery to older adults, on strengthening our network and each other, what are we doing?

Yours truly,



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

6.E-5



The Honorable Robert Rivas
Speaker of the Assembly
1201 O Street, Suite 8330
Sacramento, CA 95814

The Honorable Monique Limón
Senate President Pro Temp
1021 O St., Suite 8518
Sacramento, CA 95814

The Honorable Jesse Gabriel
Chair, Assembly Budget
1201 O Street, Suite 8230
Sacramento, CA 95814

The Honorable John Laird
Chair, Budget and Fiscal
Review Committee
1020 N Street, Room 502
Sacramento, CA 95814

May 15, 2026

RE: C4A Concerns and Opposition to Proposed Budget Trailer Bill Language on Intrastate Funding Formula Changes

Dear Legislative and Budget Leaders,

On behalf of the California Association of Area Agencies on Aging (C4A), representing California's network of Area Agencies on Aging (AAAs), I am writing to express C4A's immediate concerns regarding the California Department of Aging's proposed budget trailer bill language related to modifications to the Intrastate Funding Formula (IFF). C4A respectfully requests rejection of the proposal in its current form and urges a full review and discussion of public comments submitted by California's aging network before advancing policy changes of this significance.

C4A was unaware that budget trailer bill language on the IFF was being introduced. This came as a surprise to our membership and appears inconsistent with prior discussions with the Department. Based on conversations with CDA, the expectation conveyed to stakeholders was that legislation related to IFF changes would not be pursued until next year.

Compounding our concern, CDA recently conducted a limited two-week public comment period on proposed IFF changes that closed at 5:00 p.m. on May 12, 2026. Based on the timing of the trailer bill submission, it appears the proposal may have been advanced before the public comment period had even concluded. If true, this raises serious concerns regarding whether comments submitted by AAAs, providers, advocates, and other stakeholders received any meaningful review or consideration.

Public engagement should be more than a procedural requirement. Stakeholders throughout the aging network dedicated time and effort to provide substantive feedback based on operational experience and community need. Advancing trailer bill language before reviewing that feedback

6.E-6

undermines confidence in the process and creates the appearance that public participation was not intended to inform policy decisions.

Further, an Area Agency on Aging informally requested that CDA convene a public hearing on the Intrastate Funding Formula to allow for broader discussion and stakeholder input. That request was declined. While a short public comment period was provided, the absence of a public hearing limited opportunities for meaningful dialogue on a proposal that would substantially alter the funding structure for California's aging network.

C4A is also concerned that the proposed language was not developed in partnership with the AAA network. The Older Californians Act envisions meaningful coordination and collaboration between the Department and the Area Agencies on Aging. A proposal that fundamentally restructures the distribution of resources across California's aging network should not move forward absent direct partnership with those responsible for implementing and delivering services on the ground.

Additionally, C4A does not believe there is a compelling reason for this proposal to move through budget trailer bill language at this time. The Intrastate Funding Formula is not required to be updated until development of California's next State Plan on Aging, which is due to the Administration for Community Living in 2029. Existing federal correspondence approved California's current State Plan and suggested consideration of formula updates rather than requiring immediate action.

Beyond process concerns, C4A remains concerned that the proposed formula does not adequately reflect the current and growing needs of California's rapidly aging population. California continues to experience increasing demand for nutrition services, caregiver supports, transportation, information and assistance, and community-based aging and disability services. Any funding methodology should align with the goals of California's Master Plan on Aging and strengthen—not destabilize—the systems intended to help older adults, people with disabilities, and caregivers remain healthy and independent in their communities.

Major policy changes involving the aging network should not occur through a rushed process absent full discussion and transparent review. C4A therefore respectfully rejects the proposed budget trailer bill language and requests that a collaborative stakeholder process occur before submission of policy that will fundamentally impact California's aging network.

C4A and our membership stand ready to participate in productive discussions regarding the future of California's funding methodology. We would welcome an opportunity to discuss the realities of current funding needs and what resources would be necessary to support an Area Agency on Aging network capable of meeting both state expectations and the growing needs of older adults, people with disabilities, and caregivers across California.

Thank you for your consideration and continued commitment to California's aging network.

Sincerely,

Christina Mills
Executive Director
California Association of Area Agencies on Aging (C4A)

6.E-8



Area Agency on Aging

Nutrition Funding and Demand Information

Legislative Nutrition Investment

Modernizing the Older Californians Act – Nutrition (General Fund)

Allocation	Expended	Remaining Balance	% Spent
\$89,500,000*	\$32,520,611	\$56,979,389**	36.34%

*Does not include the final year of planned funding. \$37,200,000 is proposed to be appropriated in the 2026 Budget Act, effective July 1, 2026.

** These funds are available for expenditure or encumbrance until June 30, 2029. Area Agencies on Aging (AAAs) utilized federal COVID-19 nutrition funds first before they expired and have now pivoted to using the funds noted here.

Nutrition Waitlist

Clients	Comments
0	8 AAAs report no waitlisted clients
1 - 100	8 AAAs report up to 100 waitlisted clients, waits range from several days to one year
101 - 300	8 AAAs report between 101 - 300 waitlisted clients, waits range from several days up to 6 months
301 - 1,000	7 AAAs report between 301 - 1,000 waitlisted clients, waits range from several weeks to two years
1,001 - 1,400	2 AAAs report between 1,001 - 1,400 waitlisted clients, waits take over 6 months

6.E-9



Area Agency on Aging

Nutrition Funding and Demand Information

Older Americans Act Nutrition – Title III C1 Congregate and C2 Home Delivered (Federal and General Fund)

Allocation	Expended	Remaining Balance
\$141,421,072	\$88,705,596	\$52,699,084

**Funding is available for expenditure July 1, 2025 - June 30, 2026. This is annual baseline funding.*

Attestation

Given the limited-term Modernizing Older Californians Act Nutrition funding, AAAs are working to maximize funding resources based on local community's needs. All AAAs with waitlists have unspent nutrition funds. AAAs will receive the final installment of Modernizing Older Californians Act Nutrition July 1, 2026, or upon enactment of the 2026 Budget Act if enactment is delayed. Waitlists are triaged based on need, where the most vulnerable individuals are served first.

In addition to direct meal provisions, AAAs received \$38 million in 2022-23 to enhance and update their nutrition infrastructure. AAAs used the funding for vehicles, kitchen renovations, industrial grade equipment, and more.

AAAs work to mitigate waitlist impacts by:

- Connecting individuals to alternative food resources (e.g., food banks, community programs)
- Providing shelf-stable meals when available
- Coordinating with local partners to address immediate needs

6.E-10

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An act to amend Sections 9106, 9112, and 9114 of the Welfare and Institutions Code, relating to aging.



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6.E-11

THE PEOPLE OF THE STATE OF CALIFORNIA DO ENACT AS FOLLOWS:

SECTION 1. Section 9106 of the Welfare and Institutions Code is amended to read:

9106. (a) The department shall administer the administrative cost limitation, as defined in applicable federal law or ~~regulation~~ regulation, on a statewide basis. This allocation shall be based on notices of grant award. The formula to be used for the allocation of those funds shall be as follows:

(1) Each planning and service area shall receive a ~~base allocation of fifty thousand dollars (\$50,000)~~ an administration base allocation.

(2) The remainder of the funds available up to the statewide limitation shall be distributed to area agencies on aging on the basis of the ~~number of persons over the age of 60 years per planning and service area~~ factors and weights of the intrastate funding formula.

(b) It is the intent of the Legislature ~~that that~~, in the event that an area agency on aging chooses to use other sources of funds for the administration of its area plan, the federal money made available to that area agency on aging for administration shall be used for the provision of direct services within its planning and service area.

SEC. 2. Section 9112 of the Welfare and Institutions Code is amended to read:

9112. (a) The department shall implement an intrastate funding formula in accordance with all federal regulations. This formula shall apply to all federal and state funds allocated for programs provided for under Title III of the federal Older Americans Act (42 U.S.C. Sec. ~~3021, 3021~~ et seq.).

(b) The intrastate funding formula shall include all of the following:

(1) ~~Assurances that all area agencies on aging shall have a fifty thousand dollar (\$50,000) administrative base with the remainder of the allowable administrative dollars allocated to planning and service areas on the basis of number of persons over the age of 60 years.~~

(2) ~~(A) When data is available, an annual update by the department for changes in population characteristics to include the number of persons per planning and service area over the age of 60 years and persons in greatest economic or social need as measured by all of the following variables which shall also be annually updated by the department:~~

(i) ~~The number of persons over the age of 65 years receiving aid under the State Supplementary Program for the Aged, Blind, and Disabled, provided for under Chapter 3 (commencing with Section 12000) of Part 3 of Division 9.~~

(ii) ~~The number of persons over the age of 75 years.~~

(iii) ~~The number of minority elderly over the age of 60 years.~~

(iv) ~~The number of persons over the age of 60 years living alone.~~

(v) ~~The number of non-English-speaking persons over the age of 60 years.~~

~~(B) The weight given to each variable shall simulate the weighting used in the Washington State intrastate funding formula adjusting for the geographic factor.~~

(1) Assurances that all area agencies on aging shall have an administrative base in a dollar amount to be determined by the department and posted on its internet website every four years, with the remainder of the allowable administrative dollars allocated to planning and service areas on the basis of the factors and weights of the intrastate funding formula.



(2) (A) When data are available, an annual update by the department for changes in population characteristics to include persons in greatest economic or social need, incorporating all of the following variables, which shall be used to inform the factors of the intrastate funding formula by the department:

(i) The number of persons 60 years of age or older.

(ii) The number of persons 60 years of age or older living below 200 percent of the federal poverty level.

(iii) The number of minority individuals 60 years of age or older.

(iv) The number of persons with a disability 60 years of age or older.

(v) The number of persons 60 years of age or older living in geographic isolation.

(B) The weight given to each variable shall be equally applied at 20 percent.

(3) A rural factor that guarantees a 105-percent allocation to rural planning and service areas.

(4) A hold-harmless factor that guarantees that no planning and service area shall have its federal and state allocation of funds under Title III of the federal Older Americans Act (42 U.S.C. Sec. ~~3021~~, 3021 et seq.), excluding area agency on aging administrative costs and funds carried over from the ~~1983-84~~ 2020-21 fiscal year, reduced below the ~~1984-85~~ 2021-22 fiscal year funding levels.

(c) In the event that additional federal or state funds, in excess of those appropriated under the ~~1984-85~~ 2021-22 Budget Act, or subsequent Budget Acts are made available for services, these funds shall be used to maintain existing service levels, with the remainder to be distributed to those planning and service areas which that have been determined by the department to be under equity until parity is achieved.

(d) The department shall develop, in conjunction with the intrastate funding formula, a methodology for assuring compliance with the state targeting strategy on an intraplanning and service area basis. In developing this methodology the department shall provide assurances that as additional federal and state service dollars are allocated to the planning and service areas these dollars will be expended on those elderly individuals identified as in greatest economic or social need.

(d) This section shall be implemented upon an appropriation made by the Legislature for this purpose.

SEC. 3. Section 9114 of the Welfare and Institutions Code is amended to read:

9114. The department may, where necessary to ensure the continued provision of services or program operation, advance available state funds to an area agency on aging in an amount up to ~~one-sixth~~ one-fourth of the annual state and federal allocation to the area agency on aging.



261388692323BILL

LEGISLATIVE COUNSEL'S DIGEST

Bill No. _____
as introduced, _____
General Subject: Area agencies on aging: intrastate funding formula.

Existing law sets forth the mission of the California Department of Aging to provide leadership to area agencies on aging in developing systems of home- and community-based services that maintain individuals in their own homes or least restrictive homelike environments.

Existing law requires the department to implement an intrastate funding formula, in accordance with federal regulations, to apply to all federal and state funds allocated for programs provided for under certain provisions of the federal Older Americans Act. Existing law requires the department, on or before September 30, 2026, to submit to the Legislature and the federal Administration for Community Living an update to the formula, as specified.

Existing law requires the formula to include assurances that all area agencies on aging have a \$50,000 administrative base, with the remainder of the allowable administrative dollars allocated to planning and service areas on the basis of number of persons over the age of 60 years.

This bill would instead require the formula to include assurances that all area agencies on aging have an administrative base in a dollar amount to be determined by the department and posted on its internet website every 4 years, with the remainder allocated to planning and service areas on the basis of the factors and weights of the formula. The bill would make conforming changes to related provisions.

Existing law requires the formula to include an annual update by the department for changes in population characteristics, including the number of persons per planning and service area over the age of 60 years and persons in greatest economic or social need as measured by specified variables.

This bill would restructure those provisions, modifying the variables to include, among other things, the number of persons 60 years of age or older living below 200% of the federal poverty level or living in geographic isolation.

Existing law requires the formula to include a hold-harmless factor that guarantees that no planning and service area has its federal and state allocation of funds, as specified, reduced below the 1984–85 fiscal year funding levels.

This bill would instead set the minimum limit for the hold-harmless factor to the 2021–22 fiscal year funding levels.

Existing law requires the department to develop a methodology for assuring compliance with the state targeting strategy on an intraplanning and service area basis, as specified.

This bill would delete that provision.



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92323

Existing law authorizes the department to advance available state funds to an area agency on aging in an amount up to $\frac{1}{6}$ of the annual state and federal allocation to the area agency on aging.

This bill would instead set that amount up to $\frac{1}{4}$ of the allocation.

Vote: majority. Appropriation: no. Fiscal committee: yes. State-mandated local program: no.



261388692323BILL

6.E-15



AREA AGENCY ON AGING
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Date: 5-15-26

To: Seniors Council Board of Directors, AAA Advisory Council

From: Clay Kempf, Executive Director

RE: Executive Director's May Report

BUDGET SHORTFALLS

Fiscal staff have been putting in extensive hours focusing on alternative ways to reduce our costs, or, on how to report our options accurately. The result of that work is reported under Finance Committee.

During our monthly all-staff meeting this week, we followed up on our previous month's discussion of our fiscal challenges, and shared details of the options being considered; fewer hours, frozen wages, reduced benefits, and possible layoffs. I also spent some time expressing what a different all of our staff makes in the lives of older adults, shared how proud and honored I am to work with them, and that they should embrace that pride in themselves and with those they interact with in their personal and professional lives. That didn't make the news any better or the impact any less serious, but the sharing of what everyone is doing did create at least some feeling of success and impact.

Our 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 we're lucky to have the staff longevity and resultant expertise that results.

AGENCY OPERATIONS & FUNDING

Program Director Cristina Bañuelos has been requested to make quite a few revisions to her submitted Americorps grant renewals for both the Foster Grandparent and Senior Companion Programs for the three fiscal years of 2026-2029. Totalling 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 has applied for increases over her current grant amounts, and we're all crossing our fingers that

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

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those submissions will be successful. The revisions are mainly around the new requirement that answers to each of the grant questions follow a very specific format. It appears the review process has been modified significantly and is morphing from an art into a checklist.

CALIFORNIA ASSOCIATION OF AREA AGENCIES ON AGING STRATEGIC PLANNING

I attended C4A's annual planning retreat last week, and found it simultaneously inspiring, invigorating, and depressing and exhausting. Highlights were laying out three focus areas; 1) enhancing Information and Assistance programs and services; 2) Improving advocacy techniques and strategies, and 3) strengthening the Association. All three of those points should improve our own operations as well as the services we and our contracted service providers deliver to our local adults. The camaraderie developed within the network is always needed, and with numerous new AAA Directors the teamwork that emerged felt critical to our future.

On the depressing side, concerns over California Department of Aging's direction and how their own internal challenges impact AAAs have never seen greater. It is not a good time for CDA to be revamping AAA models when their ability to perform and communicate about their core functions is in its current state.

The retreat included advocacy training from the indomitable Kathy Mossburg of Mosaic Solutions and Advocacy, and an interactive session with Liz Fuller, staff to the California Assembly Committee on Aging and Long Term Care. Liz wants to see many more bills about older adults and people with disabilities submitted in the coming year. C4 will certainly make an effort to do so, but the invitation is also wide open for individual agencies such as ours to find legislative sponsors and submit proposals.

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

The latest version of the *Intrastate Funding Formula* is sort of unchanged from last month. CDA reports that none of the factors are being changed; however, some of the calculations they previously released were inaccurate, so a new 11x17 spreadsheet has been developed that significantly changes the allocations in at least Los Angeles County and City. Our allocation is unchanged; I haven't done a side-by-side comparison of other AAAs. But being informed that the allocations between the two L.A.s was wrong doesn't create a lot of confidence in the numbers. The new spreadsheet was shared the afternoon of May 7th; I e-mailed CDA leadership to see if they would be extending the public comment period given the change in the information being distributed and two of the five remaining days being weekends. CDA responded with a no, saying the factors haven't changed, only the resulting numbers.

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.

Corey has made several public presentations to various groups in San Benito County, keeping the playbook fresh and expanding the audience.

In Santa Cruz County, the Governance Committee will meet again on June 1, and expect to see a presentation from the City of Watsonville on their Age Friendly plan. We still haven't been allowed to present the Local Playbook presentation to the committee.

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,



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 – 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 April 2026

Overview

April focused on expanding outreach, strengthening partnerships, increasing awareness of volunteer opportunities, and continuing development of countywide aging and volunteer engagement initiatives supporting older adults, caregivers, individuals with disabilities, and residents throughout San Benito County.

Continued efforts included volunteer engagement outreach, newsletter communications, community presentations, partnership development, and support of local Master Plan for Aging (MPA) initiatives.

Volunteer Program (SBCVolunteers.org)

Continued Activities

- Continued outreach and support of participating agencies utilizing [SBCVolunteers.org](https://www.sbcvolunteers.org)
- Ongoing promotion of volunteer opportunities and community engagement efforts across San Benito County
- Monitoring volunteer sign-ups, agency participation, and platform engagement activity
- Continued outreach encouraging organizations to utilize volunteer tracking and reporting features within the platform

8.C-1

Current Platform Snapshot

- 22 active agencies registered on the platform
- 61 registered users
- 10 active volunteer opportunities listed
- 17 new users year-to-date
- Over 3,000 agency views year-to-date
- More than 1,200 volunteer need views year-to-date

Volunteer Opportunities Highlighted

Volunteer opportunities currently promoted through the platform include:

- HICAP Volunteers
- Certified Long-Term Care Ombudsman Program
- CASA of San Benito County
- Bridge Hospice Companion Volunteers
- Downtown Hollister Association events
- Senior meal and lunch support opportunities

Community Outreach & Marketing

- Continued promotion of SBCVolunteers.org, volunteer opportunities, and aging-related resources through presentations, social media, newsletters, and community networking efforts
- Continued distribution of the *San Benito County Seniors Connect Newsletter* highlighting programs, volunteer opportunities, and community resources
- Outreach efforts continued to focus on increasing visibility of senior services and volunteer engagement opportunities throughout the county

Community Meetings & Outreach Activities

- **April 18, 2026** – Tabled at the Caregiver University Conference, providing outreach and information regarding volunteer opportunities, ADRC resources, and aging services
- **April 23, 2026** – Volunteered for the San Benito Leadership Institute Information Night
- **April 28, 2026** – Met with Leah Calderon from the City of Hollister regarding community collaboration and outreach opportunities
- **May 7, 2026** – Presented to the San Benito County Business Council regarding the Master Plan for Aging, volunteer engagement efforts, and community aging initiatives
- **May 11, 2026** – Presented at the Hollister Rotary Club on SBCVolunteers.org and Master Plan for Aging Playbook

- Master Plan for Aging Playbook information
- Community partner resources and events

Strong community engagement continues through digital outreach, newsletters, social media, and presentations.

Observations & Opportunities

- Volunteer engagement and community awareness efforts continue to grow steadily
- Agency participation on the volunteer platform continues expanding, though usage and volunteer hour tracking varies by organization
- Community presentations and networking opportunities continue helping increase awareness of aging and volunteer initiatives throughout the county
- Newsletter engagement remains strong and continues driving traffic to volunteer opportunities and community resources

Next Steps / Focus Areas

- Continue expanding nonprofit and volunteer participation on SBCVolunteers.org
- Continue outreach to encourage consistent agency platform engagement and volunteer tracking
- Support future volunteer and community resource events
- Continue presentations and outreach efforts related to aging services and volunteer engagement
- Continue strengthening partnerships supporting Master Plan for Aging initiatives throughout San Benito County

Upcoming Activities & Presentations

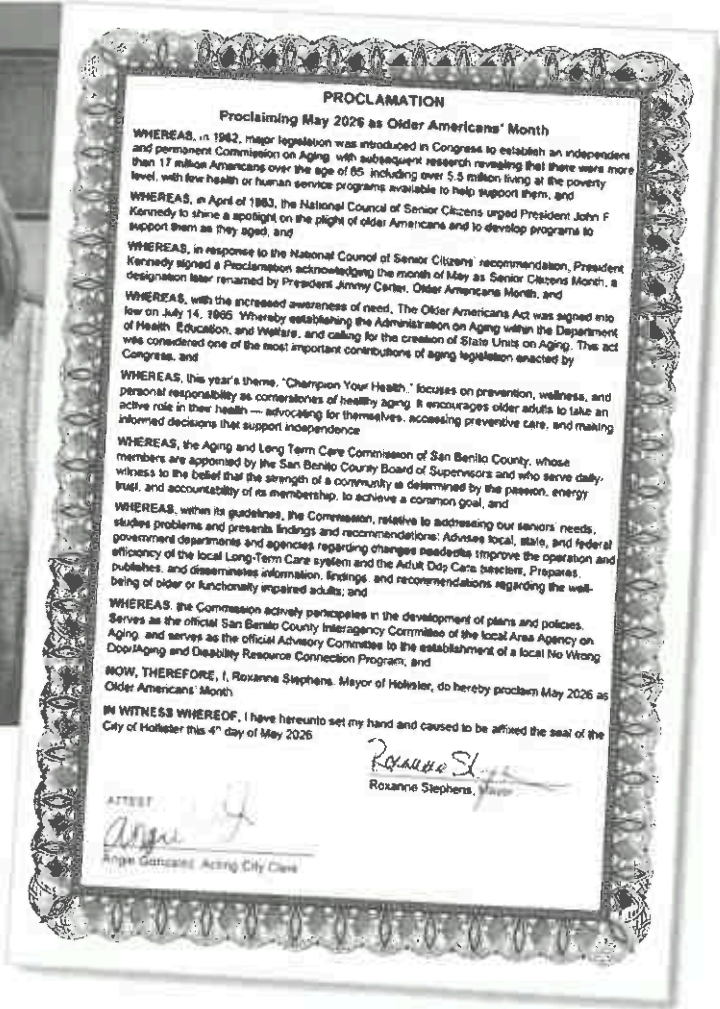
- **May 22, 2026** – Presentation on SBCVolunteers.org and volunteer opportunities for Seniors Council/AmeriCorps Seniors participants (Monica Alvarez group)
- **June 4, 2026** – Presenting at the San Benito County Behavioral Health Equity, Diversity & Inclusion Committee (EDIC) meeting
- **June, 2026** – Presentation at the Community Foundation for San Benito County Executive Directors Round Table on SBCVolunteers.org and volunteer engagement efforts
- **July 30, 2026** – ¼ combined Master Plan for Aging (MPA) workgroup meeting



Celebrating OLDER AMERICANS' MONTH



The City of Hollister proudly proclaims May 2026 as
Older Americans' Month!



This proclamation recognizes the invaluable contributions of older adults in our community and reaffirms our commitment to their well-being, independence, and quality of life.

Thank you to our seniors— you inspire and strengthen our community every day!

2026 THEME: CHAMPION YOUR HEALTH

- Focus on Prevention
- Embrace Wellness
- Stay Active
- Advocate for Your Health


Stronger Together Healthier Together.

8.C-5

Grateful

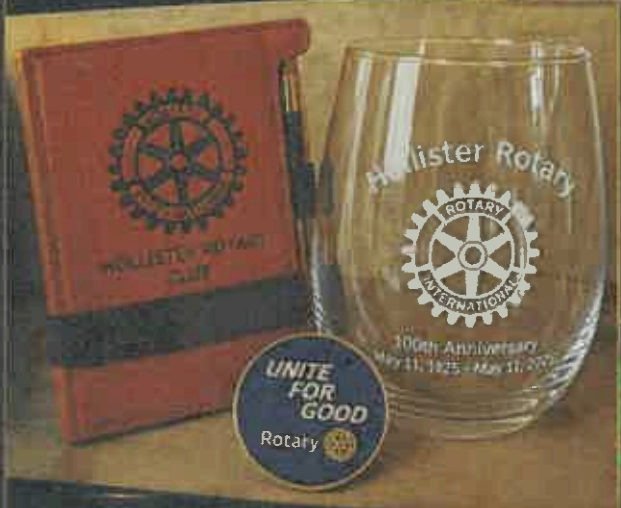
TO THE **HOLLISTER ROTARY CLUB**

Thank you for the warm welcome and this incredible gift!


 Honored to present the **Master Plan for Aging** and the **Volunteer Program** and to be part of such an inspiring community.




- Community Foundation
- Solutions Statement
- Monthly Workshops
- Adoption by Aging & Long-term Care Commission
- AAA Advisory Council
- California Dept of Aging LADAP
- Action-focused Proposal



A Gift **WITH MEANING**

A reminder of the values that guide us to **UNITE FOR GOOD.** 

Thank you, Hollister Rotary Club!

Together, we can make a difference and build a brighter future for all. 



8.C.7



TOGETHER, WE
CREATE CHANGE.





AREA AGENCY ON AGING
San Benito & Santa Cruz Counties

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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 April 2026 Report

2026 Tax Season Prep Sites*

- 1-ALL: Project SCOUT Tax Facilitated Self 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 April

1. Homeless Garden Project (Santa Cruz)
2. La Posada Senior Living Retirement Community (Santa Cruz)
3. In-home support services for those unable to attend tax sites

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

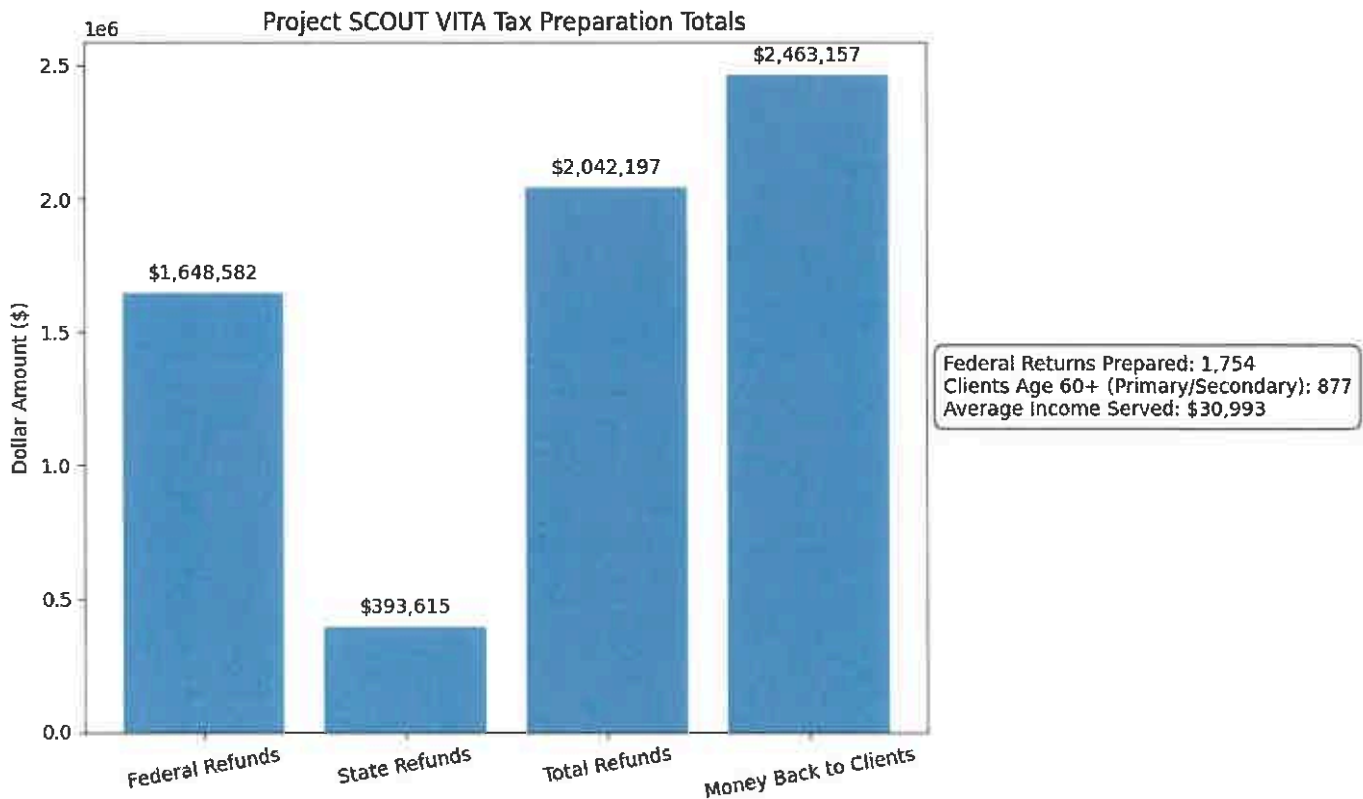
Project SCOUT APRIL Tax Production Totals

Project SCOUT Volunteer Income Tax Assistance Tax Preparation Totals:

- Number of Federal returns prepared – 1754
- Primary or secondary 60 years old or older – 877
- Average income of those serviced – \$30,993.00
- Dollar Amount of Federal refunds including credits – \$1,648,582.00
- Dollar Amount of State refunds including credits – \$393,615.00

Dollar Amount of TOTAL refunds – **\$2,042,197.00**

Money back in the wallets of our clients, including average return cost of \$240.00 – **\$2,463,157.00!**



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 – 2 (2 SCC, 0 SBC)
- Number of clients assisted with Calfresh in Santa Cruz County – 2
- Number of clients assisted with Calfresh in San Benito County – 0

9.D-2

April 2026 Recap

Challenges:

April services in Hollister out of the Pauline Valdivia Memorial Center (PVMC) were jeopardized due to the last minute notice of site closure. This situation left our dedicated crew of volunteers and support staff scrambling for space where our clients could be serviced, as well as needing many extra hours of work to provide feasible options to our taxpayers. Wednesday afternoon (2pm to 5pm) services out of the Pauline Valdivia Memorial Center (PVMC) were switched to the San Juan Bautista Library, and our dedicated volunteers kept on servicing clients on Wednesday evenings (post 5:30pm to 7:30pm) out of the PVMC up until 4/15, through April, even when electricity was not available!

Best Practices:

As a result of the hard work and efforts of The Aging and Disability Resource Center (ADRC), San Juan Bautista Public Library, and our dedicated volunteers and staff, Project SCOUT was able to provide accommodations to 29 tax clients scheduled for services out of PVMC in April through appointments at the San Juan Bautista Library, or Wednesday evening (5:30 to 7:30) drop-offs and pick-ups of returns at PVMC, thus assuring that everyone promised with an appointment did not get left stranded.

April 15th was the closure of regular tax season, yet Project SCOUT continued providing services up until the end of April at 4 of its 15 tax season sites, providing at least 25 tax returns to taxpayers post April 15th. We foresee Project SCOUT providing at least once per month services to our Santa Cruz and San Benito County communities up until October 15th 2026.

Project SCOUT has been nominated by members of the Santa Cruz County community for the "Be The Difference" Award hosted by the Santa Cruz Volunteer Center. We are honored and delighted to be recognized for the important and significant work Project SCOUT provides to those we serve, and look forward to attending the ceremony this following May 20th.



PROCLAMATION

Proclaiming May 2026 as Older Americans' Month

WHEREAS, in 1962, major Legislation was introduced in Congress to establish an independent and permanent Commission on Aging, with subsequent research revealing that there were more than 17 million Americans over the age of 65, including over 5.5 million living at the poverty level, with few health or human service programs available to help support them; and

WHEREAS, in April of 1963, the National Council of Senior Citizens urged President John F. Kennedy to shine a spotlight on the plight of older Americans and to develop programs to support them as they aged; and

WHEREAS, in response to the National Council of Senior Citizens' recommendation, President Kennedy signed a Proclamation acknowledging the month of May as Senior Citizens Month, a designation later renamed by President Jimmy Carter, Older Americans Month; and

WHEREAS, with the increased awareness of need, The Older Americans Act was signed into law on July 14, 1965. Whereby establishing the Administration on Aging within the Department of Health, Education, and Welfare, and calling for the creation of State Units on Aging. This act was considered one of the most important contributions of aging legislation enacted by Congress; and

WHEREAS, this year's theme, "Champion Your Health," focuses on prevention, wellness, and personal responsibility as cornerstones of healthy aging. It encourages older adults to take an active role in their health — advocating for themselves, accessing preventive care, and making informed decisions that support independence.

WHEREAS, the Aging and Long Term Care Commission of San Benito County, whose members are appointed by the San Benito County Board of Supervisors and who serve daily-witness to the belief that the strength of a community is determined by the passion, energy, trust, and accountability of its membership, to achieve a common goal; and

WHEREAS, within its guidelines, the Commission, relative to addressing our seniors' needs, studies problems and presents findings and recommendations; Advises local, state, and federal government departments and agencies regarding changes needed to improve the operation and efficiency of the local Long-Term Care system and the Adult Day Care system; Prepares, publishes, and disseminates information, findings, and recommendations regarding the well-being of older or functionally impaired adults; and

WHEREAS, the Commission actively participates in the development of plans and policies; Serves as the official San Benito County Interagency Committee of the local Area Agency on Aging, and serves as the official Advisory Committee to the establishment of a local No Wrong Door/Aging and Disability Resource Connection Program; and

NOW, THEREFORE, I, Roxanne Stephens, Mayor of Hollister, do hereby proclaim May 2026 as Older Americans' Month

IN WITNESS WHEREOF, I have hereunto set my hand and caused to be affixed the seal of the City of Hollister this 4th day of May 2026.


Roxanne Stephens, Mayor

ATTEST:


Angie Gonzalez, Acting City Clerk

9-1



SAN BENITO COUNTY BOARD OF SUPERVISORS

Dom Zanger
District 1

Kollin Kosmicki
District 2

Mindy Sotelo
District 3

Angela Curro
District 4

Ignacio Velazquez
District 5

A Proclamation Recognizing May 2026 as Older Americans' Month in San Benito County

Whereas, in 1962, major Legislation was introduced in Congress, to establish an independent and permanent Commission on Aging with subsequent research revealing that there were more than 17 million Americans over the age of 65, including over 5.5 million living at the poverty level, with few health or human service programs available to help support them, and; and

Whereas, in April of 1963, the National Council of Senior Citizens urged President John F. Kennedy to shine a spotlight on the plight of older Americans and to develop programs to support them as they aged; and

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Whereas, historically, Older Americans Month has been a time to acknowledge the contributions of older persons to our Country, today it is profoundly important to extend the 2021 theme "Communities of Strength" to include the Aging and Long Term Care Commission of San Benito County, whose members are appointed, by the San Benito County Board of Supervisors and who serve daily-witness to the belief that the strength of a community is determined by the passion, energy, trust, and accountability of its membership, to achieve a common goal; and

Whereas, within its guidelines, the Commission, relative to addressing our seniors' needs, studies problems and presents findings and recommendations; Advises local, state, and federal government departments and agencies regarding changes needed to improve the operation and efficiency of the local Long-Term Care system and the Adult Day Care system; Prepares, publishes, and disseminates information, findings, and recommendations regarding the well-being of older or functionally impaired adults; and

Whereas, the Commission actively participates in the development of plans and policies; Serves as the official San Benito County Interagency Committee of the local Area Agency on Aging, and serves as the official Advisory Committee to the establishment of a local No Wrong Door/Aging and Disability Resource Connection Program; and

Now, Therefore, Be It Resolved, the County of San Benito that the Month of May 2026 be declared Older Americans' Month.

In witness of the approval of this proclamation by the Board of Supervisors of San Benito County on this 12th day of May 2026.

9-2

Dom Zanger, Chair

City of Scotts Valley
Mayor's Proclamation

Proclaiming May 2026 as Older Americans Month

WHEREAS, the City of Scotts Valley is home to many vibrant and active older Americans who contribute their time, wisdom, and experience to our community; and

WHEREAS, according to the last census, the population of people over 65 in Santa Cruz County grew faster than any county in California, and

WHEREAS, aging is a dynamic process that leads to new abilities and knowledge to share with our community; and

WHEREAS, communities benefit when people of all ages, abilities, and backgrounds have the opportunity to contribute and live meaningful lives; and

WHEREAS, the City of Scotts Valley recognizes the need to create a community that offers the services and support older adults may need to make choices about how they age; and

WHEREAS, the 2026 theme for Older Americans Month is *Champion Your Health* which underscores prevention, wellness, and personal responsibility as cornerstones of healthy aging, and

WHEREAS, this theme encourages older Americans to take an active role in managing and advocating for their health, accessing preventive care, and making informed decisions, and

WHEREAS, in the Scotts Valley community, we value partnerships that empower individuals to lead healthy lives, and we embrace the many opportunities that come with aging.

NOW, THEREFORE, I, Donna Lind, as Mayor of the City of Scotts Valley, on behalf of the entire City Council, do hereby proclaim May 2026 to be Older Americans Month.



Donna Lind, Mayor

Signed and sealed this 6th day of May 2026

Receiving the 2026 Older Americans Month proclamation from Scott Valley's Mayor and City Council





SAN JOSE MERCURY NEWS

Opinion: AI is coming for our aging parents, ready or not Robotic companions are coming into our parents' and grandparents' lives as they grow older. But will they really help?



Dai Sugano — Bay Area News Group

Marieta Chapman talks to "Miroki," a social companion robot brought in to interact with clients at Live Oak Adult Day Services in San Jose in November.



By [Catherine Thorbecke](#)

PUBLISHED: April 30, 2026 at 3:15 AM PDT | UPDATED: April 30, 2026 at 4:17 AM PDT

At first glance, AI companions for lonely seniors can seem dystopian, looking less like innovation than a bleak sign of social failure.

Spending a couple days last week in Tokyo nursing homes, I watched plushie robots the size of human babies being handed to aging parents and grandparents, and prototypes of conversational dolls aimed to fill gaps when family, community and human care fall short.

It reminded me of showing ChatGPT's advanced voice mode to my own 97-year-old grandfather last summer, shortly after my grandmother passed away. He was appalled, making clear he had no interest in chatting with the artificially cheery voice.

9-6

Caregiver shortage

And yet my instinct to recoil at this all collides with a harder reality. Japan, like much of Asia, is aging fast and running short of caregivers. It's no surprise that policymakers are turning to technology. The nation is expected to face a shortage of 570,000 care workers by 2040, making the search for solutions increasingly urgent. And the meteoric rise of AI makes companion robots an attractive policy goal.

But they're no panacea. They may have a place in the future of care, but the bigger risk is that governments and companies will use them to dodge the harder fixes required to treat care work as essential infrastructure. This involves increasing wages, supporting seniors who want to live at home, and focusing on targeted tech solutions that help people maintain independence as they age.

Japan, long a leader in industrial automation, has been trying to make eldercare robots happen for a long time. Despite the immense hype, headlines and millions of dollars in government funding, it has yielded mixed results. Ghosts of these past efforts are still being put to use. In one of the facilities I visited, Softbank Group Corp.'s since-discontinued Pepper slumped in the corner of a room before it was rebooted to conduct an exercise class — alongside a human handler who was doing the same motions right beside it. Some patients seemed genuinely drawn to a stuffed animal robotic toy that would coo and react to touch, but the artificial bark rang in my ears for hours afterward.

In his 2023 book *Robots Won't Save Japan*, ethnographic researcher James Wright argues that the country's costly push into eldercare automation often produced unintended consequences and, in some cases, more work for staffers. Much of the money might have been better spent elsewhere, he notes. But Wright's fieldwork largely predates the AI shock that has breathed new life into this push.

Despite persistent stereotypes, Japan hasn't widely embraced the idea of robots as friends. The country had the lowest share of respondents that said they were "extremely excited" about AI companions in an Ipsos survey of 21 countries. It also had the highest share — 46% — of people who said they have not used an AI tool or application in the last 12 months. There is no doubt AI has the potential to revolutionize workflows, especially in care facilities. But those efforts might be better spent on easing caregivers' administrative burdens than replacing their face time with patients.

At one nursing home, the hopes for the potential of AI companion toys from their creators and caregivers was contagious. Even loving families cannot be present 24 hours a day, and engaging with the stuffed toy seemed better than staring at a wall. The engineered friendliness of chatbots has sowed concerns for its impact on young users, but what if that drive for engagement is conversely useful if it's aimed at keeping lonely seniors cognitively engaged?

Experimentation is spreading across Asia. In South Korea, government-led public welfare programs have distributed 14,000 AI-powered "Hyodo" devices to elderly people, baby-sized

plushies that use ChatGPT to communicate. In China, some retirees are turning to apps like ByteDance Ltd.'s Doubao for ordinary frustrations of aging, like deciphering tiny print on instruction manuals.

Teaching seniors

Tencent Holdings Ltd. said last month that it has run more than 200 local workshops teaching seniors how to use its Yuanbao chatbot for tasks such as asking for life hacks and recipes. Beijing increasingly views the “silver economy” as a new growth engine, meaning there is also a lot of money to be made. One national political adviser told state-backed media that the market could reach \$4 trillion by 2035.

With worker shortages deepening across the region, governments are running out of time. The debate is often framed as a choice between technology and immigration. Policymakers, especially here in Tokyo, would be wise to accept more foreign workers to plug labor gaps, but that’s not a durable answer on its own. This is no longer just a Japan problem. By 2050, nearly all OECD countries will be “super-aged,” with more than 20% of their populations over 65. Asia’s scramble to care for an aging population is worth paying attention to as it offers a preview of the pressures much of the world will soon face.

As AI more broadly weasels its way into progressively intimate corners of our lives, companion bots seem like a well-meaning attempt to use the technology for good. But they’re just one tool in a kit that should have the larger goal of preserving dignity in old age and easing the burden of caregivers with whatever works — whether that’s more robots, or even luring bodybuilders to the profession, as one company in the manufacturing and shipping hub of Nagoya is doing.

Automation still has a place here. Research published last year on Japanese nursing homes found that robot adoption reduced worker quit rates and was associated with better care quality. The findings were telling: Robots may raise productivity by shifting staff toward tasks involving “human touch, empathy and dexterity,” where humans still hold the clear advantage.

But one detail buried in research stood out: Care worker pay barely exceeded the minimum wage. Before investing millions more yen in robotic experiments, the next policy response might be to meaningfully lift wages as part of a broader effort to restore dignity and status to the work itself.

It seems inevitable that AI companions are coming into our parents’ and grandparents’ lives as they age. The test is whether they will serve as a useful support for human care, or a shiny excuse to abandon it.

Catherine Thorbecke is a Bloomberg Opinion columnist covering Asia tech. ©2026 Bloomberg News. Distributed by Tribune Content Agency.