

Contra Costa County



Area Agency on Aging 2020-2024 Area Plan Update 21-22 PSA #7

Revisions Submitted 2/15/21 by

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Contra Costa County

AREA PLAN UPDATE (APU) CHECKLIST

PSA 07

Check one: ☒ FY21-22 ☐ FY 22-23 ☐ FY 23-24

Use for APUs only

AP Guidance Section	APU Components (To be attached to the APU)	Check if Included
	➤ <i>Update/Submit A) through I) ANNUALLY:</i>	
n/a	A) Transmittal Letter- (requires <u>hard copy</u> with original ink signatures or official signature stamp- no photocopies)	<input checked="" type="checkbox"/>
n/a	B) APU- (submit entire APU electronically only)	<input checked="" type="checkbox"/>
2, 3, or 4	C) Estimate- of the number of lower income minority older individuals in the PSA for the coming year	<input checked="" type="checkbox"/>
7	D) Public Hearings- that will be conducted	<input checked="" type="checkbox"/>
n/a	E) Annual Budget	<input checked="" type="checkbox"/>
10	F) Service Unit Plan (SUP) Objectives and LTC Ombudsman Program Outcomes	<input checked="" type="checkbox"/>
18	G) Legal Assistance	<input checked="" type="checkbox"/>
	➤ <i>Update/Submit the following only if there has been a CHANGE or the section was not included in the 2020-2024</i>	Mark Changed/Not Changed (C or N/C)
		C N/C
5	Minimum Percentage/Adequate Proportion	<input type="checkbox"/> <input checked="" type="checkbox"/>
5	Needs Assessment	<input type="checkbox"/> <input checked="" type="checkbox"/>
9	AP Narrative Objectives:	<input type="checkbox"/> <input checked="" type="checkbox"/>
9	• System-Building and Administration	<input checked="" type="checkbox"/> <input type="checkbox"/>
9	• Title IIIB-Funded Programs	<input checked="" type="checkbox"/> <input type="checkbox"/>
9	• Title IIIB-Transportation	<input checked="" type="checkbox"/> <input type="checkbox"/>
9	• Title IIIB-Funded Program Development/Coordination (PD or C)	<input checked="" type="checkbox"/> <input type="checkbox"/>
9	• Title IIIC-1	<input checked="" type="checkbox"/> <input type="checkbox"/>
9	• Title IIIC-2	<input checked="" type="checkbox"/> <input type="checkbox"/>
9	• Title IIID	<input checked="" type="checkbox"/> <input type="checkbox"/>
20	• Title IIIE-Family Caregiver Support Program	<input checked="" type="checkbox"/> <input type="checkbox"/>
9	• HICAP Program	<input type="checkbox"/> <input checked="" type="checkbox"/>
12	Disaster Preparedness	<input type="checkbox"/> <input checked="" type="checkbox"/>
14	Notice of Intent-to Provide Direct Services	<input checked="" type="checkbox"/> <input type="checkbox"/>
15	Request for Approval-to Provide Direct Services	<input type="checkbox"/> <input checked="" type="checkbox"/>
16	Governing Board	<input checked="" type="checkbox"/> <input type="checkbox"/>
17	Advisory Council	<input checked="" type="checkbox"/> <input type="checkbox"/>
21	Organizational Chart(s)	<input type="checkbox"/> <input checked="" type="checkbox"/>

TRANSMITTAL LETTER
2020-2024 Four Year Area Plan/ Annual Update
Check one: ☒ **FY 20-24** ☒ **FY 21-22** ☐ **FY 22-23** ☐ **FY 23-24**

AAA Name: Contra Costa County Area Agency on Aging

PSA 7

This Area Plan is hereby submitted to the California Department of Aging for approval. The Governing Board and the Advisory Council have each had the opportunity to participate in the planning process and to review and comment on the Area Plan. The Governing Board, Advisory Council, and Area Agency Director actively support the planning and development of community-based systems of care and will ensure compliance with the assurances set forth in this Area Plan. The undersigned recognize the responsibility within each community to establish systems in order to address the care needs of older individuals and their family caregivers in this planning and service area.

1. Diane Burgis
(Type Name)

Signature: Governing Board Chair ¹

Date

2. James Donnelly
(Type Name)

Signature: Advisory Council Chair

Date

3. Kathy Gallagher
(Type Name)

Signature: EHSD Director

Date

¹ Original signatures or official signature stamps are required.

SECTION 7. PUBLIC HEARINGS

PSA 7 _____

At least one public hearing must be held each year of the four-year planning cycle. CCR Title 22, Article 3, Section 7302(a) (10) and Section 7308, Older Americans Act Reauthorization Act of 2016, Section 314(c) (1).

Fiscal Year	Date	Location	Number of Attendees	Presented in languages other than English? ² Yes or No	Was hearing held at a Long-Term Care Facility? ³ Yes or No
2020-2021	July 13, 2020	Zoom- Web based	49	No	No
2021-2022	March 17, 2021	Zoom-Web based	45	No	No
2022-2023					
2023-2024					

The following must be discussed at each Public Hearing conducted during the planning cycle:

1. Summarize the outreach efforts used in seeking input into the Area Plan from institutionalized, homebound, and/or disabled older individuals. Needs assessment was distributed to homebound seniors via the Meals on Wheels provider and through Senior Nutrition. A caregiver survey was also distributed to capture the needs of those older adults who relied on a caregiver to complete a survey on their behalf.
2. Were proposed expenditures for Program Development (PD) or Coordination (C) discussed?
☒ Yes. Go to question #3
☐ Not applicable, PD and/or C funds are not used. Go to question #4
3. Summarize the comments received concerning proposed expenditures for PD and/or C. No comments received.
4. Attendees were provided the opportunity to testify regarding setting minimum percentages of Title III B program funds to meet the adequate proportion of funding for Priority Services
☒ Yes. Go to question #5
☐ No, Explain:

5. Summarize the comments received concerning minimum percentages of Title IIIB funds to meet the adequate proportion of funding for priority services. No comments received.

6. List any other issues discussed or raised at the public hearing.

- This is a most exciting time for aging advocacy. Thank you to AAA for making the Master Plan for Aging the #1 goal. Taking lifespan/intergenerational approach is exciting. Older adults will be part of planning for living. Historically, AAA had a net around it, net has been lifted. We can all participate in a broad vision of what we'd like to see. Invite participation of different levels. I'm thrilled for the opportunities.
- What is the process of ADRC? What is rollout?
- Tracy Murray had an introductory meeting with Independent Living Resources (ILR) this week. Tracy is working with CDA regarding their expectations, learning about ILR partner, and we will have assistance from a foundation in terms of staffing. Tracy committed to engagement with this. However, there is a huge deficit due to lack of ADRC funding to ADRC. We need to advocate with the state to fund for this but she is optimistic.
- CHF is extremely interested in supporting exploration and planning for ADRC. Extremely privileged and proud of funding Health Care Pathways program (Ombudsman, Opportunity Junction, Mt. Diablo Adult Education) that was mentioned in Local Playbook. CHF is supporting East Contra Costa Senior Resource Initiative which is a collaboration of [Meals on Wheels Diablo Region](#), [Choice in Aging](#), [Contra Costa Senior Legal Services](#), [Diablo Valley Foundation for the Aging](#) and [Ombudsman Services of Contra Costa, Solano and Alameda Counties](#) to enhance awareness and access to services for seniors in East Contra Costa County
Also, at the beginning of the pandemic CHF is worked with Family Caregiver Alliance and Area Agency on Aging to bring real time, accurate information resources to the community. It has been so successful that the group continues to meet and will build that momentum to activities going forward. For example, Bill Pelter brought ADRC to CHF attention.
Contra Costa is blessed with strong nonprofit leaders and passionate government leaders, with collaborative spirit, to form public/private partnerships
- Have expenditure percentages/funds changed over the years?
- So excited about hearing things. In the past, we operated from crisis management. Now, partnerships are building a better future, so inspired and hopeful.

7. Note any changes to the Area Plan which were a result of input by attendees.
None. No changes.

SECTION 9 - AREA PLAN NARRATIVE GOALS AND OBJECTIVES **PSA 7****Goal # 1**

The AAA will engage with older adults, community based providers, public organizations and philanthropy to incorporate resources contained in the Master Plan for Aging and “Local Playbook” to develop local initiatives that build age-friendly and disability-friendly communities.			
Rationale: The California Department of Aging released the Master Plan on Aging (MPA) and associated “Playbook” for local communities to use in developing age friendly communities. The MPA reflects an unprecedented commitment to older adults and people with disabilities and provides a framework for planning and building communities that are friendly for all ages.			
OBJECTIVES	Projected Start and End Dates	Title IIIB Funded PD or C⁴	Update Status⁵
1. The AAA and Advisory Council on Aging Planning Committee will work with community members to review the Master Plan on Aging and “Local Playbook” developed by the California Department of Aging in order to design a local planning process for developing age friendly communities.	7/1/2021-6/30/2022	A	New
2. The AAA and Advisory Council on Aging Planning Committee will lead a process to engage local leaders and enlist their support in the local planning efforts.	7/1/2021-6/30/2022	A	New
3. The AAA and Advisory Council on Aging Planning Committee will incorporate data from the 2020-2024 Area Plan and other data sources to review and understand the needs and gaps in services for older adults and people with disabilities.	7/1/2021-6/30/2022	A	New
4. The AAA and Advisory Council on Aging Planning Committee members will develop an action plan for local initiatives.	7/1/2021-6/30/2022	A	New

Goal # 2

Goal: The AAA will promote development for age-friendly communities, ensure that community infrastructure fully and meaningfully includes older adults and families by having accessible housing, transportation and community amenities for all ages and stages of life.

Rationale: AAA needs assessment, community forums, key informant results, and caller identified need through the Information and Referral line indicate that access to affordable housing and transportation are the highest priorities for older adults to remain living in their home communities. Contra Costa residents will have access to the help they need to live in the homes and communities they choose as they age.

OBJECTIVES	Projected Start and End Dates	Title III B Funded PD or C ⁴	Update Status ⁵
1. Through the ACOA Housing Workgroup, the AAA Senior Staff Assistant is working in concert with housing service providers, County Housing Authority, affordable housing developers, homeless programs, and other stakeholders to identify and develop advocacy strategies and solutions to help seniors struggling to find affordable housing. Anticipated outcomes include developing collateral materials and streamlined referrals for seniors at risk of homelessness.	7/1/2020-6/30/2021 7/1/2021-6/30/2022	C C	Continued
2. To improve transportation services for Contra Costa County, the AAA will work with public agencies, ACOA Transportation workgroup, transportation professionals, community-based organizations, and older adults to: <ul style="list-style-type: none">Identify senior transportation issues and resources.Explore partnerships and collaborations to improve and expand services.	7/1/2020-6/30/2021 7/1/2021-6/30/2022	A A	Continued
3. Aging and Adult Services Senior Staff Assistants, Program Manager, Aging & Adult Services Director, and ACOA members will focus on education and promotion of “age-friendly” initiatives to ensure that access to housing, transportation and civic life are planned in local municipality’s policy decisions to address the needs of seniors.	7/1/2020-6/30/2021 7/1/2021-6/30/2022	A A	Continued

Goal # 3

Goal: The AAA will provide older adults with access to programs promoting health and well-being and will advocate for person-centered health care and services to optimize health and quality of life.

Rationale: The Master Plan on Aging calls out reimagined healthcare for older adults and people with disabilities. Contra Costa residents must have access to quality care social services throughout their life span.

OBJECTIVES	Projected Start and End Dates	Title III/B Funded PD or C ⁴	Update Status ⁵
1. AAA Staff will collaborate with Department of Health Services (Senior Nutrition program) to increase meal sites and alternative meals programs in the less accessible areas (food deserts) of the county. Update: deleting objective because of redundancy with objective below.	7/1/2020-6/30/2021 7/1/2021-6/30/2022	A A	D
2. AAA Program Manager/ Senior Staff Assistant will work with Dept. of Public Health/Health Services and CBO's to expand services in the identified food desert in East County to provide greater access to nutritious meals through alternative delivery systems, including restaurant meals delivery or voucher program. The program goal is to provide meals to 50 consumers.	7/1/2020-6/30/2021 7/1/2021-6/30/2022	PD PD	Continued
3. AAA Staff will seek new partners (e.g., Behavioral Health) who are not part of the Aging network to include them and provide greater services to older adults in great need, such as homeless and crisis shelters.	7/1/2020-6/30/2021 7/1/2021-6/30/2022	C C	Continued
4. The AAA will support the support the health of older adults by providing programs that are evidenced based, including Matter of Balance, Otago Exercise program in the community, and Otago home based exercise programs. All program have been peer reviewed and sanctioned by the Administration of Community Living.	7/1/2020-6/30/2021 7/1/2021-6/30/2022	A A	Continued

Goal #4

The AAA will improve access to information, assistance and resources in order to achieve equity of resources and services among all older adults in our community and to address isolation of older adults			
Rationale: The AAA Needs Assessment results, Key Informant Survey responses and the Senior Town Hall participants expressed many concerns about ongoing threats of potential financial exploitation by the many scams targeting older adults. The Covid Epidemic has increased the social isolation of seniors and shown that the public health and social services systems are poorly prepared to address the needs of vulnerable adults.			
OBJECTIVES	Projected Start and End Dates	Title IIIB Funded PD or C⁴	Update Status⁵
1. The AAA Program Manager, Aging and Adult Services Senior Staff Assistants, and the ACOA will work collaboratively with CBO's to develop and plan special programs/events/services to help address economic insecurity in retirement.	7/1/2020-6/30/2021	A	Delete
2. AAA Program Manager, Senior Staff Assistants and the Advisory Council will work with various services providers and other interested stakeholders to coordinate elder abuse prevention activities for seniors vulnerable to or at risk of exploitation. <ul style="list-style-type: none">The Elder Abuse Prevention Workgroup of the ACOA will provide trainings and dissemination of elder abuse prevention materials and other related presentations will be made to the public several times per year.AAA/APS staff members in conjunction with Ombudsman will assist with hosting seminars, fairs, or other educational events related to elder abuse and Elder Abuse Month.	7/1/2020-6/30/2021 7/1/2021-6/30/2022	A A	Continued
3. The AAA will explore partnerships with the Centers for Independent Living (core partner) and other organizations to develop an Aging, Disability and Resource Connection (ADRC). Success will be measured by development of a memorandum of understanding between core partners to pursue designation as an ADRC.	7/1/2020-6/30/2021 7/1/2021-6/30/2022	PD PD	Continued

<p>4. In order to address the needs of the Lesbian, Gay, Bisexual, and Transgender (LGBTQ) community, the AAA will:</p> <ul style="list-style-type: none"> • Support CBOs to provide services for LGBTQ clients; • Encourage training for CBOs to ensure safe and welcoming environments to people of all sexual orientation and gender identities. 	<p>7/1/2020-6/30/2021</p> <p>7/1/2021-6/30/2022</p>	<p>A</p> <p>A</p>	<p>Continued</p>
<p>5. The AAA Staff will work with APS, ACOA Health Workgroup, ACOA Technology Workgroup, and other agencies to promote awareness of the health risks of social isolation by:</p> <p>AAA Staff will work with CBOs to alleviate isolation by:</p> <ul style="list-style-type: none"> • Creating an accessible AAA website that will showcase events and community activities to ensure that community resources are available to everyone throughout the county • Ensure that county social workers and others (outside of the AAA) have access to resources to connect clients to services that provide socialization. 	<p>7/1/2020-6/30/2021</p> <p>7/1/2021-6/30/2022</p>	<p>A</p> <p>A</p>	<p>Continued</p>
<p>6. The AAA Staff, ACOA, and other community members will Present a forum in for older adults on retirement planning and options. The event is planned for late 2021 Spring 2022 and will include numerous speakers and on various subject matters. The AAA anticipates having an attendance of approximately 300 people.</p>	<p>7/1/2021-6/30/2022</p>	<p>C</p>	<p>New</p>

¹ Indicate if Program Development (PD) or Coordination (C) is the objective (cannot be both). If a PD objective is not completed in the timeline required and is continuing in the following year, any objective revision must state additional tasks.

² Use for the Area Plan Updates only to indicate if the objective is New, Continued, Revised, Completed, or Deleted.

SECTION 10 - SERVICE UNIT PLAN (SUP) OBJECTIVES

PSA 7 _____

**TITLE III/VIIA SERVICE UNIT PLAN OBJECTIVES
CCR Article 3, Section 7300(d)**

The Service Unit Plan (SUP) uses the National Aging Program Information System (NAPIS) Categories and units of service. They are defined in the [NAPIS State Program Report \(SPR\)](#)

For services not defined in NAPIS, refer to the [Service Categories and Data Dictionary and the National Ombudsman Reporting System \(NORS\) Instructions](#).

1. Report the units of service to be provided with **ALL funding sources**. Related funding is reported in the annual Area Plan Budget (CDA 122) for Titles IIIB, IIIC-1, IIIC-2, IIID, and VIIA. Only report services provided; others may be deleted.

Personal Care (In-Home)**Unit of Service = 1 hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	N/A		
2021-2022			
2022-2023			
2023-2024			

Homemaker (In-Home)**Unit of Service = 1 hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	N/A		
2021-2022			
2022-2023			
2023-2024			

Chore (In-Home)**Unit of Service = 1 hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	N/A		
2021-2022			
2022-2023			
2023-2024			

Home-Delivered Meal**Unit of Service = 1 meal**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	500,000	1, 3	
2021-2022	500,000	3	
2022-2023			
2023-2024			

Adult Day/ Health Care (In-Home)**Unit of Service = 1 hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	4,455	1,3	
2021-2022	4,455	3	
2022-2023			
2023-2024			

Case Management (Access)**Unit of Service = 1 hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	N/A		
2021-2022			
2022-2023			
2023-2024			

Assisted Transportation (Access)**Unit of Service = 1 one-way trip**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	1,635	2	4
2021-2022	1,635	2	
2022-2023			
2023-2024			

Congregate Meals**Unit of Service = 1 meal**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	133,000	1	
2021-2022	133,000	3	
2022-2023			
2023-2024			

Nutrition Counseling**Unit of Service = 1 session per participant**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	N/A		
2021-2022			
2022-2023			
2023-2024			

Transportation (Access)**Unit of Service = 1 one-way trip**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	N/A		
2021-2022			
2022-2023			
2023-2024			

Legal Assistance**Unit of Service = 1 hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	3,458	4	
2021-2022	3,458	3	
2022-2023			
2023-2024			

Nutrition Education**Unit of Service = 1 session per participant**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	19,950	2	
2021-2022	19,950	3	
2022-2023			
2023-2024			

Information and Assistance (Access)**Unit of Service = 1 contact**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	17,500	1,2,3,4	
2021-2022	17,500	4	
2022-2023			
2023-2024			

Outreach (Access)**Unit of Service = 1 contact**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	N/A		
2021-2022			
2022-2023			
2023-2024			

2. NAPIS Service Category – “Other” Title III Services

- ☐ Each **Title IIIB** “Other” service must be an approved NAPIS Program service listed above on the “Schedule of Supportive Services (III B)” page of the Area Plan Budget (CDA 122) and the CDA Service Categories and Data Dictionary.
- ☐ Identify **Title IIIB** services to be funded that were not reported in NAPIS categories. (Identify the specific activity under the Other Supportive Service Category on the “Units of Service” line when applicable.)

Title IIIB, Other Priority and Non-Priority Supportive Services

For all Title IIIB “Other” Supportive Services, use the appropriate Service Category name and Unit of Service (Unit Measure) listed in the CDA Service Categories and Data Dictionary.

- ☐ Other **Priority Supportive Services include:** Alzheimer's Day Care, Comprehensive Assessment, Health, Mental Health, Public Information, Residential Repairs/Modifications, Respite Care, **Telephone Reassurance**, and **Visiting**
- ☐ Other **Non-Priority Supportive Services include:** Cash/Material Aid, Community Education, Disaster Preparedness Materials, Emergency Preparedness, Employment, Housing, Interpretation/Translation, Mobility Management, Peer Counseling, Personal Affairs Assistance, Personal/Home Security, Registry, Senior Center Activities, and Senior Center Staffing

All "Other" services must be listed separately. Duplicate the table below as needed.

Telephone Reassurance

Unit of Service= 1 contact

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	10,140	1,3,4	
2021-2022	10,140	3	
2022-2023			
2023-2024			

Visiting

Unit of Service= 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	11,960	1,2,3,4	
2021-2022	11,960	3	
2022-2023			
2023-2024			

3. Title IIID/ Disease Prevention and Health Promotion

Instructions for Title IIID Disease Prevention and Health Promotion: : Enter the name of each proposed program that meets the criteria for evidence-based programs described in PM 15-10, proposed units of service, and the Program Goal and Objective number(s).

Unit of Service = 1 contact

Evidence-Based Program Name(s): **A Matter of Balance and Otago Classes**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	1,140	3	3
2021-2022	1,140	3	4
2022-2023			
2023-2024			

DRAFT

TITLE IIIB and Title VIIA:
LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES

2020-2024 Four-Year Planning Cycle

As mandated by the Older Americans Act Reauthorization Act of 2016, the mission of the LTC Ombudsman Program is to seek resolution of problems and advocate for the rights of residents of LTC facilities with the goal of ensuring their dignity, quality of life, and quality of care.

Each year during the four-year cycle, analysts from the Office of the State Long-Term Care Ombudsman (OSLTCO) will forward baseline numbers to the AAA from the prior fiscal year National Ombudsman Reporting System (NORS) data as entered into the Statewide Ombudsman Program database by the local LTC Ombudsman Program and reported by the OSTLCO in the State Annual Report to the Administration on Aging (AoA).

The AAA will establish targets each year in consultation with the local LTC Ombudsman Program Coordinator. Use the yearly baseline data as the benchmark for determining yearly targets. Refer to your local LTC Ombudsman Program's last three years of AoA data for historical trends. Targets should be reasonable and attainable based on current program resources.

Complete all Measures and Targets for Outcomes 1-3;

Outcome 1. The problems and concerns of long-term care residents are solved through complaint resolution and other services of the Ombudsman Program. Older Americans Act Reauthorization Act of 2016, Section 712(a) (3), (5)]

Measures and Targets:

A. Complaint Resolution Rate (NORS Element CD-08) (Complaint Disposition). The average California complaint resolution rate for FY 2017-2018 was 73%.

1. FY 2018-2019 Baseline Resolution Rate:
 Number of complaints resolved 1,520 + number of partially resolved complaints 492
 divided by the total number of complaints received 2,425 = Baseline Resolution Rate
83 % FY 2020-2021 Target Resolution Rate 93 %

2. FY 2019-2020 Baseline Resolution Rate:
 Number of complaints partially or fully resolved 1303 divided by the total number
 of complaints received 1376 = Baseline Resolution Rate 95 %
 FY 2021-2022 Target Resolution Rate 93 %

3. FY 2020 - 2021 Baseline Resolution Rate:
 Number of complaints partially or fully resolved _____ divided by the total number
 of complaints received _____ = Baseline Resolution Rate _____ %
 FY 2022-2023 Target Resolution Rate _____ %

4. FY 2021-2022 Baseline Resolution Rate:
 Number of complaints partially or fully resolved _____ divided by the total number
 of complaints received _____ = Baseline Resolution Rate _____ %
 FY 2023-2024 Target Resolution Rate _____

Program Goals and Objective Numbers: 4

B. Work with Resident Councils (NORS Elements S-64 and S-65)

1. FY 2018-2019 Baseline: Number of Resident Council meetings attended 65
2. FY 2020-2021 Target: 70
2. FY 2019-2020 Baseline: Number of Resident Council meetings attended 42 FY
 2021-2022 Target: 50
3. FY 2020-2021 Baseline: Number of Resident Council meetings attended _____
 FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Resident Council meetings attended _____
 FY 2023-2024 Target: _____

Program Goals and Objective Numbers: _____

C. Work with Family Councils (NORS Elements S-66 and S-67)

1. FY 2018-2019 Baseline: Number of Family Council meetings attended 0
2. FY 2020-2021 Target: 8
2. FY 2019-2020 Baseline: Number of Family Council meetings attended 2
 FY 2021-2022 Target: 8
3. FY 2020-2021 Baseline: Number of Family Council meetings attended _____
 FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Family Council meetings attended _____
 FY 2023-2024 Target: _____

Program Goals and Objective Numbers: 4

D. Information and Assistance to Facility Staff (NORS Elements S-53 and S-54) Count of
 instances of Ombudsman representatives' interactions with facility staff for the purpose of
 providing general information and assistance unrelated to a complaint. Information and
 Assistance may be accomplished by telephone, letter, email, fax, or in-person.

1. FY 2018-2019 Baseline: Number of Instances 1,104
 FY 2020-2021 Target: 1,500
3. FY 2019-2020 Baseline: Number of Instances 2520
 FY 2021-2022 Target: 2,500
3. FY 2020-2021 Baseline: Number of Instances _____
 FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Instances _____
 FY 2023-2024 Target: _____

Program Goals and Objective Numbers: _____

E. Information and Assistance to Individuals (NORS Element S-55) Count of instances of Ombudsman representatives' interactions with residents, family members, friends, and others in the community for the purpose of providing general information and assistance unrelated to a complaint. Information and Assistance may be accomplished by: telephone, letter, email, fax, or in person.

1. FY 2018-2019 Baseline: Number of Instances <u>1,911</u> FY 2020-2021 Target: <u>2,000</u>
3. FY 2019-2020 Baseline: Number of Instances <u>2535</u> FY 2021-2022 Target: <u>3,000</u>
3. FY 2020-2021 Baseline: Number of Instances _____ FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Instances _____ FY 2023-2024 Target: _____
Program Goals and Objective Numbers: _____

F. Community Education (NORS Element S-68) LTC Ombudsman Program participation in public events planned to provide information or instruction to community members about the LTC Ombudsman Program or LTC issues. The number of sessions refers to the number of events, not the number of participants. This cannot include sessions that are counted as Public Education Sessions under the Elder Abuse Prevention Program.

1. FY 2018-2019 Baseline: Number of Sessions <u>9</u> FY 2020-2021 Target: <u>20</u>
2. FY 2019-2020 Baseline: Number of Sessions <u>6</u> FY 2021-2022 Target: <u>15</u>
3. FY 2020-2021 Baseline: Number of Sessions _____ FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Sessions _____ FY 2023-2024 Target: _____
Program Goals and Objective Numbers: <u>1</u>

G. Systems Advocacy (NORS Elements S-07, S-07.1)

One or more new systems advocacy efforts must be provided for each fiscal year Area Plan Update. In the relevant box below for the current Area Plan year, in narrative format, please provide at least one new priority systems advocacy effort the local LTC Ombudsman Program will engage in during the fiscal year. The systems advocacy effort may be a multi-year initiative, but for each year, describe the results of the efforts made during the previous year and what specific new steps the local LTC Ombudsman program will be taking during the upcoming year. Progress and goals must be separately entered each year of the four-year cycle in the appropriate box below.

Systems Advocacy can include efforts to improve conditions in one LTC facility or can be county-wide, state-wide, or even national in scope. (Examples: Work with LTC facilities to improve pain relief or increase access to oral health care, work with law enforcement entities to improve response and investigation of abuse complaints, collaboration with other agencies to improve LTC residents' quality of care and quality of life, participation in disaster preparedness

planning, participation in legislative advocacy efforts related to LTC issues, etc.) Be specific about the actions planned by the local LTC Ombudsman Program.

Enter information in the relevant box below.

FY 2020-2021
<p>FY 2020-2021 Systems Advocacy Effort(s): Ombudsman Services will continue to work with Healthcare Career Pathway partners to expand and improve the education for caregivers and licensed care professionals. The partnership will work to deepen the pathway into east Contra Costa County and improve person centered education and access to students with addressable barriers. The partnership will work to develop a secondary training site and expand offerings to programs like RNA, HHA, LVN</p>
FY 2021-2022
<p>Outcome of FY 2020-2021 Efforts: Working in partnership with Opportunity Junction and Mt. Diablo Adult Education the Healthcare Career Pathway continues to thrive and is preparing to launch its fourth cohort at MDAE and first cohort at the secondary site at Opportunity Junction (in April 2021). The partners are still working to add stackable training programs such as Home Health Aid and other pathways in the allied healthcare system.</p> <p>FY 2021-2022 Systems Advocacy Effort(s): Ombudsman Services will continue its efforts to advance the Healthcare Career Pathway by focusing on statewide expansion in order to make the program available to other communities. The program was featured in the Master Plan on Aging Local Playbook and several Legislators are in conversation regarding advancing the program via legislative action.</p>
FY 2022-2023
<p>Outcome of FY 2021-2022 Efforts:</p> <p>FY 2022-2023 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)</p>
FY 2023-2024
<p>Outcome of 2022-2023 Efforts:</p> <p>FY 2023-2024 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)</p>

Outcome 2. Residents have regular access to an Ombudsman. [(Older Americans Act Reauthorization Act of 2016), Section 712(a) (3) (D), (5) (B) (ii)]

Measures and Targets:

A. Routine Access: Nursing Facilities (NORS Element S-58) Percentage of nursing facilities within the PSA that were visited by an Ombudsman representative at least once each quarter **not** in response to a complaint. The percentage is determined by dividing the number of nursing facilities in the PSA that were visited at least once each quarter not in response to a complaint by the total number of nursing facilities in the PSA. NOTE: This is not a count of *visits* but a count of *facilities*. In determining the number of facilities visited for this measure, no nursing facility can be counted more than once.

1. FY 2018-2019 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint 29

FY 2021-2022 Target: 94 %

2. FY 2019-2020 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint 0

FY 2021-2022 Target: 94%

3. FY 2020-2021 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint _____

FY 2022-2023 Target: %

4. FY 2021-2022 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint _____

FY 2023-2024 Target: %

Program Goals and Objective Numbers: 4

B. Routine access: Residential Care Communities (NORS Element S-61) Percentage of RCFEs within the PSA that were visited by an Ombudsman representative at least once each quarter during the fiscal year **not** in response to a complaint. The percentage is determined by dividing the number of RCFEs in the PSA that were visited at least once each quarter not in response to a complaint by the total number of RCFEs in the PSA. NOTE: This is not a count of *visits* but a count of *facilities*. In determining the number of facilities visited for this measure, no RCFE can be counted more than once.

1. FY 2018-2019 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint 345

FY 2020-2021 Target: 93

2. FY 2019-2020 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint 0

FY 2021-2022 Target: 90

3. FY 2020-2021 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint _____

FY 2022-2023 Target:

4. FY 2021-2022 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint _____
 FY 2023-2024 Target: _____ %

Program Goals and Objective Numbers: 1, 4

C. Number of Full-Time Equivalent (FTE) Staff (NORS Element S-23) this number may only include staff time legitimately charged to the LTC Ombudsman Program. Time spent working for or in other programs may not be included in this number. For example, in a local LTC Ombudsman Program that considers full-time employment to be 40 hour per week, the FTE for a staff member who works in the Ombudsman Program 20 hours a week should be 0.5, even if the staff member works an additional 20 hours in another program.

1. FY 2018-2019 Baseline: 5.51 FTEs
 FY 2020-2021 Target: 5.5 FTEs

2. FY 2019-2020 Baseline: 5.3 FTEs
 FY 2021-2022 Target: 5.5 FTEs

3. FY 2020-2021 Baseline: _____ FTEs
 FY 2022-2023 Target: _____ FTEs

4. FY 2021-2022 Baseline: _____ FTEs
 FY 2023-2024 Target: _____ FTEs

Program Goals and Objective Numbers: 1, 4

D. Number of Certified LTC Ombudsman Volunteers (NORS Element S-24)

1. FY 2018-2019 Baseline: Number of certified LTC Ombudsman volunteers 25
 FY 2020-2021 Projected Number of certified LTC Ombudsman volunteers 25

3. FY 2019-2020 Baseline: Number of certified LTC Ombudsman volunteers 17
 FY 2021-2022 Projected Number of certified LTC Ombudsman volunteers 15

3. FY 2020-2021 Baseline: Number of certified LTC Ombudsman volunteers _____
 FY 2022-2023 Projected Number of certified LTC Ombudsman volunteers _____

4. FY 2021-2022 Baseline: Number of certified LTC Ombudsman volunteers _____
 FY 2023-2024 Projected Number of certified LTC Ombudsman volunteers _____

Program Goals and Objective Numbers: 1, 4

Outcome 3. Ombudsman representatives accurately and consistently report data about their complaints and other program activities in a timely manner. [Older Americans Act Reauthorization Act of 2016, Section 712(c)]

Measures and Targets:

In the box below, in narrative format, describe one or more specific efforts your program will undertake in the upcoming year to increase the accuracy, consistency, and timeliness of your

National Ombudsman Reporting System (NORS) data reporting.

Some examples could include:

- Hiring additional staff to enter data
- Updating computer equipment to make data entry easier
- Initiating a case review process to ensure case entry is completed in a timely manner

Ombudsman has recently added an Intake Lead responsible for overseeing the intake process and who works closely with program leaders to ensure all complaints are dispatched quickly and responded to as soon as possible.

DRAFT

TITLE VIIA ELDER ABUSE PREVENTION
SERVICE UNIT PLAN OBJECTIVES

Units of Service: AAA must complete at least one category from the Units of Service below.

Units of Service categories include public education sessions, training sessions for professionals, training sessions for caregivers served by a Title III E Family Caregiver Support Program, educational materials distributed, and hours of activity spent developing a coordinated system which addresses elder abuse prevention, investigation, and prosecution.

When developing targets for each fiscal year, refer to data reported on the Elder Abuse Prevention Quarterly Activity Reports. Set realistic goals based upon the prior year's numbers and the resources available. Activities reported for the Title VII Elder Abuse Prevention Program must be distinct from activities reported for the LTC Ombudsman Program. No activity can be reported for both programs.

AAAs must provide one or more of the service categories below.

NOTE: The number of sessions refers to the number of presentations and not the number of attendees

- **Public Education Sessions** –Indicate the total number of projected education sessions for the general public on the identification, prevention, and treatment of elder abuse, neglect, and exploitation.
- **Training Sessions for Professionals** –Indicate the total number of projected training sessions for professionals (service providers, nurses, social workers) on the identification, prevention, and treatment of elder abuse, neglect, and exploitation.
- **Training Sessions for Caregivers Served by Title III E** –Indicate the total number of projected training sessions for unpaid family caregivers who are receiving services under Title III E of the Older Americans Act (OAA) on the identification, prevention, and treatment of elder abuse, neglect, and exploitation. Older Americans Act Reauthorization Act of 2016, Section 302(3) 'Family caregiver' means an adult family member, or another individual, who is an informal provider of in-home and community care to an older individual or to an individual with Alzheimer's disease or a related disorder with neurological and organic brain dysfunction.
- **Hours Spent Developing a Coordinated System to Respond to Elder Abuse** –Indicate the number of hours to be spent developing a coordinated system to respond to elder

abuse. This category includes time spent coordinating services provided by the AAA or its contracted service provider with services provided by Adult Protective Services, local law enforcement agencies, legal services providers, and other agencies involved in the protection of elder and dependent adults from abuse, neglect, and exploitation.

Educational Materials Distributed –Indicate the type and number of educational materials to be distributed to the general public, professionals, and caregivers (this may include materials that have been developed by others) to help in the identification, prevention, and treatment of elder abuse, neglect, and exploitation.

- **Number of Individuals Served** –Indicate the total number of individuals expected to be reached by any of the above activities of this program.

DRAFT

TITLE VIIA ELDER ABUSE PREVENTION SERVICE UNIT PLAN OBJECTIVES

The agency receiving Title VIIA Elder Abuse Prevention funding is: **Contra Costa County Senior Legal Services**

Fiscal Year	Total # of Public Education Sessions
2020-2021	9
2021-2022	9
2022-2023	
2023-2024	

Fiscal Year	Total # of Training Sessions for Professionals
2020-2021	5
2021-2022	5
2022-2023	
2023-2024	

Fiscal Year	Total # of Training Sessions for Caregivers served by Title IIIIE
2020-2021	N/A
2021-2022	
2022-2023	
2023-2024	

Fiscal Year	Total # of Hours Spent Developing a Coordinated System
2020-2021	N/A
2021-2022	
2022-2023	
2023-2024	

Fiscal Year	Total # of Copies of Educational Materials to be Distributed	Description of Educational Materials
2020-2021	500	Identity theft and account fraud; Elder Court/Senior Self-Help Clinic; What Should I Know About Elder Abuse; Consumer Fraud
2021-2022	500	
2022-2023		
2023-2024		

Fiscal Year	Total Number of Individuals Served
2020-2021	950
2021-2022	950
2022-2023	
2023-2024	

DRAFT

TITLE III E SERVICE UNIT PLAN OBJECTIVES**CCR Article 3, Section 7300(d)****2020-2024 Four-Year Planning Period**

This Service Unit Plan (SUP) uses the five broad federally mandated service categories. Refer to the CDA Service Categories and Data Dictionary Revisions Effective July 2018 for eligible activities and service unit measures. Specify proposed audience size or units of service for ALL budgeted funds.

Direct and/or Contracted III E Services

CATEGORIES	1	2	3
Family Caregiver Services Caring for Elderly	<i>Proposed Units of Service</i>	<i>Required Goal #(s)</i>	<i>Optional Objective #(s)</i>
Information Services	# of activities and Total est. audience for above		
2020-2021	# of activities: 75 Total est. audience for above: 5,332	2	
2021-2022	# of activities: 75 Total est. audience for above: 5,332	3	
2022-2023	# of activities: Total est. audience for above:		
2023-2024	# of activities: Total est. audience for above:		
Access Assistance	Total contacts		
2020-2021	984	1	
2021-2022	984	3	
2022-2023			
2023-2024			

Access Assistance		Total contacts	
Support Services	Total hours		
2020-2021	1,620	1	
2021-2022	1,620	3	
2022-2023			
2023-2024			
Respite Care	Total hours		
2020-2021	2,904	1, 4	
2021-2022	2,904	3	
2022-2023			
2023-2024			
Supplemental Services	Total occurrences		
2020-2021	225	1,3,4	
2021-2022	225	3	
2022-2023			
2023-2024			

Direct and/or Contracted IIIE Services

Grandparent Services Caring for Children	Proposed Units of Service	Required Goal #(s)	Optional Objective #(s)
Information Services	# of activities and Total est. audience for above		
2020-2021	# of activities: 0 Total est. audience for above:		
2021-2022	# of activities: Total est. audience for above:		
2022-2023	# of activities: Total est. audience for above:		
2023-2024	# of activities: Total est. audience for above:		

Grandparent Services Caring for Children	<i>Proposed</i> Units of Service	<i>Required</i> Goal #(s)	<i>Optional</i> Objective #(s)
Access Assistance	Total contacts		
2020-2021	200	1	
2021-2022	200	3	
2022-2023			
2023-2024			
Support Services	Total hours		
2020-2021	350	1	
2021-2022	350	3	
2022-2023			
2023-2024			
Respite Care	Total hours		
2020-2021	475	1	
2021-2022	475	3	
2022-2023			
2023-2024			
Supplemental Services	Total occurrences		
2020-2021	59	1, 3	
2021-2022	59	3	
2022-2023			
2023-2024			

**HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (HICAP)
SERVICE UNIT PLAN
CCR Article 3, Section 7300(d)**

MULTIPLE PSA HICAPs: If you are a part of a multiple-PSA HICAP where two or more AAAs enter into an agreement with one “Managing AAA,” to deliver HICAP services on their behalf to eligible persons in their AAA, then each AAA is responsible for providing HICAP services in the covered PSAs in a way that is agreed upon and equitable among the participating parties.

HICAP PAID LEGAL SERVICES: Complete this section if your Master Contract contains a provision for using HICAP funds to provide HICAP Legal Services.

STATE & FEDERAL PERFORMANCE TARGETS: The Administration for Community Living (ACL) establishes targets for the State Health Insurance Assistance Program (SHIP)/HICAP performance measures (PMs). ACL introduced revisions to the SHIP PMs in late 2016 in conjunction with the original funding announcement (ref HHS-2017-ACL-CIP-SAPG-0184) for implementation with the release of the Notice of Award (Grant No. 90SAPG0052-01-01 issued July 2017).

Using ACL’s approach, CDA HICAP provides State and Federal Performance Measures with goal-oriented targets for each AAA’s Planning and Service Area (PSA). One change to all PMs is the shift to county-level data. In general, the State and Federal Performance Measures include the following:

- PM 1.1 Clients Counseled ~ Number of finalized Intakes for clients/ beneficiaries that received HICAP services
- PM 1.2 Public and Media Events (PAM) ~ Number of completed PAM forms categorized as “interactive” events
- PM 2.1 Client Contacts ~ Percentage of one-on-one interactions with any Medicare beneficiaries
- PM 2.2 PAM Outreach Contacts ~ Percentage of persons reached through events categorized as “interactive”
- PM 2.3 Medicare Beneficiaries Under 65 ~ Percentage of one-on-one interactions with Medicare beneficiaries under the age of 65
- PM 2.4 Hard-to-Reach Contacts ~ Percentage of one-on-one interactions with “hard-to-reach” Medicare beneficiaries designated as:
 - PM 2.4a Low-income (LIS)
 - PM 2.4b Rural
 - PM 2.4c English Second Language (ESL)
- PM 2.5 Enrollment Contacts ~ Percentage of contacts with one or more qualifying enrollment topics discussed

AAA's should demonstrate progress toward meeting or improving on the Performance requirements established by CDA and ACL as is displayed annually on the *HICAP State and Federal Performance Measures* tool located online at: https://www.aging.ca.gov/Providers_and_Partners/Area_Agencies_on_Aging/#pp-planning. (Reference CDA PM 17-11 for further discussion, including current HICAP Performance Measures and Definitions).

For current and future planning, CDA requires each AAA ensure that HICAP service units and related federal *Annual Resource Report* data are documented and verified complete/ finalized in CDA's Statewide HICAP Automated Reporting Program (SHARP) system per the existing contractual reporting requirements. HICAP Service Units do not need to be input in the Area Plan (with the exception of HICAP Paid Legal Services, where applicable).

HICAP Legal Services Units of Service (if applicable) ⁶

Fiscal Year (FY)	3.1 Estimated Number of Clients Represented Per FY (Unit of Service)	Goal Numbers
2020-2021	6	4
2021-2022	6	3
2022-2023		
2023-2024		

Fiscal Year (FY)	3.2 Estimated Number of Legal Representation Hours Per FY (Unit of Service)	Goal Numbers
2020-2021	30	4
2021-2022	30	3
2022-2023		
2023-2024		

Fiscal Year (FY)	3.3 Estimated Number of Program Consultation Hours Per FY (Unit of Service)	Goal Numbers
2020-2021	9	1,4
2021-2022	9	3
2022-2023		
2023-2024		

³ Requires a contract for using HICAP funds to pay for HICAP Legal Services.

SECTION 12 - DISASTER PREPAREDNESS

PSA 7 _____

Disaster Preparation Planning Conducted for the 2020-2024 Planning Cycle Older Americans Act Reauthorization Act of 2016, Section 306(a)(17); 310, CCR Title 22, Sections 7529 (a)(4) and 7547, W&I Code Division 8.5, Sections 9625 and 9716, CDA Standard Agreement, Exhibit E, Article 1, 22-25, Program Memo 10-29(P)

1. Describe how the AAA coordinates its disaster preparedness plans and activities with local emergency response agencies, relief organizations, state and local governments, and other organizations responsible for emergency preparedness and response as required in OAA, Title III, Section 310: The AAA ensures the preparedness of its organization and staff to meet the challenges of a disaster. The main responsibility of the AAA is to support the emergency management community to ensure that the disaster-related needs of older adults and persons with disabilities receive access to overall community disaster planning services. The AAA is part of the Contra Costa County structure and therefore conforms to the County's overall plan for disaster response and preparedness. One element of the County's plan enforces the requirement of County staff, including AAA staff, to serve as official disaster preparedness workers in accordance with Section 3100 of the California Government Code.
2. The AAA recognizes emergency preparedness and protection of older adults is a priority given the PG&E power shut- offs/outages, high heat in parts of the county and most recently, the COVID-19 pandemic. The pandemic disproportionality affected older adults, who were asked to shelter in place in mid-March. This affected their ability to obtain and access supportive programs and services, including the ability to purchase and obtain meals. Our organization serves as main point of access for Meals on Wheels as a resource for meals and nutrition.
- 3.
4. Identify each of the local Office of Emergency Services (OES) contact person(s) within the PSA that the AAA will coordinate with in the event of a disaster (add additional information as needed for each OES within the PSA):

Name	Title	Telephone	email
Rick Kovar	OES Manager	Office:	rkova@socccounty.us

5. Identify the Disaster Response Coordinator within the AAA:

Name	Title	Telephone	email
Anthony Macias	Sr. Staff Assistant	Office: 925-602-4175	amacias@ehsd.cccounty.us

6. List critical services the AAA will continue to provide after a disaster and describe how

these services will be delivered:

Critical Services

How Delivered?

a. Staff Shelter

County staff will staff emergency shelters

b. Support meal delivery

AAA staff to assist with meal delivery

7. List any agencies with which the AAA has formal emergency preparation or response agreements. The AAA is housed within the Contra Costa County Employment and Human Services Department which is responsible for care and shelter in the event of a major disaster. It has formal agreements with the American Red Cross, The Contra Costa County Office of Emergency Services, the Contra Costa County Health Department, and the Contra Costa Sheriff's Department.
8. Identify each of the local Office of Emergency Services (OES) contact person(s) within the PSA that the AAA will coordinate with in the event of a disaster (add additional information as needed for each OES within the PSA): Anthony Macias (925)602-4175
9. Describe how the AAA will:
 - Identify vulnerable populations: The AAA utilizes information obtained from the In-Home Support Services program and the aging network in Contra Costa County on vulnerable at risk individuals. The aging network consists of a collaboration of Ombudsman Services, AAA Contractors, and non-profit organizations whose purposes is to serve and advocate for older adults.
 - Follow-up with these vulnerable populations after a disaster event: Protocols are in place to identify at risk populations and arrange for shelter care for those with special needs. AAA works with the Ombudsman Program to ensure skilled nursing facilities, assisted living facilities, and residential care homes provide for their clients, residents, and patients during and after a disaster.

2020-2024 Four-Year Planning Cycle

Funding for Access, In-Home Services, and Legal Assistance

The CCR, Article 3, Section 7312, requires the AAA to allocate an “adequate proportion” of federal funds to provide Access, In-Home Services, and Legal Assistance in the PSA. The annual minimum allocation is determined by the AAA through the planning process. The minimum percentages of applicable Title III B funds⁵ listed below have been identified for annual expenditure throughout the four-year planning period. These percentages are based on needs assessment findings, resources available within the PSA, and discussions at public hearings on the Area Plan.

Category of Service and the Percentage of Title III B Funds expended in/or to be expended in FY 2020-21 through FY 2023-2024

Access:

Transportation, Assisted Transportation, Case Management, Information and Assistance, Outreach, Comprehensive Assessment, Health, Mental Health, and Public Information

2020-21 20 % 21-22 20 % 22-23 _____ % 23-24 _____ %

In-Home Services:

Personal Care, Homemaker, Chore, Adult Day / Health Care, Alzheimer’s, Residential

2020-21 8 % 21-22 8 % 22-23 _____ % 23-24 _____ %

Legal Assistance Required Activities:⁶

Legal Advice, Representation, Assistance to the Ombudsman Program and Involvement in the Private Bar

2020-21 11 % 21-22 11 % 22-23 _____ % 23-24 _____ %

Explain how allocations are justified and how they are determined to be sufficient to meet the need for the service within the PSA. 7

With no significant changes to the level of needs in these service categories, the percentage of allocation remains the same as the previous planning cycle. The percentages continue to be established by the Advisory Council on Aging and are approved each year at the public hearing and are in-line with AAA funding and budget. However, if CBAS is eliminated these proportions will change at the next AP Update.

⁴ Minimum percentages of applicable funds are calculated on the annual Title IIIB baseline allocation, minus Title IIIB administration and minus Ombudsman. At least one percent of the final Title IIIB calculation must be allocated for each “Priority Service” category or a waiver must be requested for the Priority Service category(s) that the AAA does not intend to fund.

⁵ Legal Assistance must include all the following activities: Legal Advice, Representation, Assistance to the Ombudsman Program and Involvement in the Private Bar.

SECTION 14 - NOTICE OF INTENT TO PROVIDE DIRECT SERVICES**PSA 7**CCR Article 3, Section 7320 (a) (b) and 42 USC Section 3027(a) (8) (C)

If an AAA plans to directly provide any of the following services, it is required to provide a description of the methods that will be used to assure that target populations throughout the PSA will be served.

☐ Check if not providing any of the below-listed direct services.

Check applicable direct services**Title IIIB**

- ☒ Information and Assistance
☐ Case Management
☐ Outreach
☒ Program Development
☒ Coordination
☐ Long Term Care Ombudsman

check each applicable Fiscal Year**20-21 21-22 22-23 23-24**

- ☒ ☒ ☐ ☐
☐ ☐ ☐ ☐
☐ ☐ ☐ ☐
☒ ☒ ☐ ☐
☒ ☒ ☐ ☐
☐ ☐ ☐ ☐

Title IID

- ☐ Disease Prevention and Health Promo.

20-21 21-22 22-23 23-24

- ☐ ☐ ☐ ☐

Title IIIE⁹

- ☐ Information Services
☐ Access Assistance
☐ Support Services
☐ Respite Services
☐ Supplemental Services

20-21 21-22 22-23 23-24

- ☐ ☒ ☐ ☐
☒ ☐ ☐ ☐
☐ ☐ ☐ ☐
☐ ☐ ☐ ☐
☐ ☐ ☐ ☐

Title VIIA

- ☐ Long Term Care Ombudsman

20-21 21-22 22-23 23-24

- ☐ ☐ ☐ ☐

Title VII

- ☐ Prevention of Elder Abuse, Neglect,
And Exploitation.

20-21 21-22 22-23 23-24

- ☐ ☐ ☐ ☐

Describe methods to be used to ensure target populations will be served throughout the PSA.

- Require RFP's and RFI's to include a plan to reach individuals with the greatest economic or social needs
- Require subcontractors to serve a minimum percentage of low-income and minority clients
- Provide translation service as needed to assist non-/or limited English speaking client in all regions of the county
- Actively participate in work groups focusing on addressing multicultural issues
- Collaborating with other agencies to assist in identifying and servicing low-income, minority seniors who may be at risk of not accessing needed services
- Focus on providing additional services to food deserts in the county

SECTION 15 - REQUEST FOR APPROVAL TO PROVIDE DIRECT SERVICES **PSA 7**

Older Americans Act Reauthorization Act of 2016 Section
307(a) (8)
CCR Article 3, Section 7320(c), W&I Code Section 9533(f)

Complete and submit for CDA approval a separate Section 15 for each direct service not specified in Section 14. The request for approval may include multiple funding sources for a specific service.

☐ Check box if not requesting approval to provide any direct services.

Identify Service Category: HICAP

Check applicable funding source:¹⁰

☐ IIIB

☐ IIIC-1

☐ IIIC-2

☐ IIID

☐ IIIE

☐ VIIA

☒ HICAP

Request for Approval Justification:

☒ Necessary to Assure an Adequate Supply of Service OR

☒ More cost effective if provided by the AAA than if purchased from a comparable service provider.

Check all fiscal year(s) the AAA intends to provide service during this Area Plan cycle.

☒ **FY 20-21** ☒ **FY 21-22** ☒ **FY 22-23** ☒ **FY 23-24**

Provide: documentation below that substantiates this request for direct delivery of the above stated service¹⁰: Contra Costa County AAA has provided HICAP as a direct service since the inception of HICAP. The location of HICAP within county government has aided client outcomes greatly in regards to its relationships to the County's Medi-Cal and IHSS staff, and can more effectively solve Medicare problems for people who also have Medi-Cal because of these relationships. No other AAA's are affected.

SECTION 16 - GOVERNING BOARDPSA 7**GOVERNING BOARD MEMBERSHIP
2020-2024 Four-Year Area Plan Cycle**

CCR Article 3, Section 7302(a) (11)

Total Number of Board Members: 5**Name and Title of Officers:****Office Term Expires:**

DIANE BURGIS, Chair, District III	December 2025
CANDACE ANDERSEN, District II	December 2025

Names and Titles of All Members:**Board Term Expires:**

JOHN GIOIA, District I	December 2022
KAREN MITCHOFF, District IV	December 2022
FEDERAL GLOVER, District V	December 2025

Explain any expiring terms – have they been replaced, renewed, or other?

SECTION 17 - ADVISORY COUNCIL

PSA _____

**ADVISORY COUNCIL MEMBERSHIP
2020-2024 Four-Year Planning Cycle**

Older Americans Act Reauthorization Act of 2016 Section 306(a) (6) (D)
45 CFR, Section 1321.57
CCR Article 3, Section 7302(a)
(12)

Total Council Membership (include vacancies) 40 (9 Vacancies)Number of Council Members over age 60 31

Race/Ethnic Composition	% of PSA's 60+Population	% on Advisory Council
White	<u>61%</u>	<u>71%</u>
Hispanic	<u>13%</u>	<u>3.5%</u>
Black	<u>8%</u>	<u>6.5%</u>
Asian/Pacific Islander	<u>0.5%</u>	<u>19%</u>
Native American/Alaskan Native	<u>0.2%</u>	<u>0</u>
Other	<u>17.3%</u>	<u>0%</u>

Name and Title of Officers:**Office Term Expires:**

James Donnelly, President/Chair	December 15, 2021
Jill Kleiner, Vice President	December 15, 2021
Dennis Yee, Secretary and Treasurer	December 15, 2021

Name and Title of other members:**Office Term Expires:**

Aufhauser, Martin, Representing town of Moraga	September 30, 2021
Bhambra, Jagjit, At Large #11	September 30, 2021
Bruns, Mary, At Large #15	September 30, 2022
Card, Deborah, At Large #5	September 30, 2022
Donnelly, James, Representing City of Danville	September 30, 2021
Donovan, Kevin MAL #17	September 30, 2022
Doran, Jennifer, Representing City of Hercules	September 30, 2022
Fernandez, Rudy, Representing City of Antioch	September 30, 2022
Frederick, Susan, At Large #20	September 30, 2022
Garret, Gail, Nutrition Council Representative	September 30, 2022

Hernandez, Michelle, At Large #13	September 30, 2022
Kee, Arthur, Representing City of Brentwood	September 30, 2021
Kim-Selby, Joanna, Representing City of El Cerrito	September 30, 2022
Kleiner, Jill, At Large #19	September 30, 2021
Krohn, Shirley, At Large #2	September 30, 2022
Leasure, Nancy, At Large #8	September 30, 2021
Lipson, Steve, At Large #6	September 30, 2022
Napoli, Frank, Representing City of Walnut Creek	September 30, 2021
Neemuchwalla, Nuru, At Large #12	September 30, 2022
O'Toole, Brian, At Large #16	September 30, 2021
Partridge, Erin, Representing City of Lafayette	September 30, 2021
Reed, Penny, At Large #1	September 30, 2022
Richards, Gerald, At Large #9	September 30, 2021
Sakai-Miller, Sharon, Representing City of San Ramon	September 30, 2021
Selleck, Summer, At Large #7	September 30, 2022
Smith, Frances, Representing City of Richmond	September 30, 2022
Thompson, Kathie, At Large #3	September 30, 2021
Tobey, Terri, At Large #10	September 30, 2021
Wanket, Greg, Representing City of Martinez	September 30, 2021
Van Ackeren, Lorna, Representing City of Pleasant Hill	September 30, 2022
Yee, Dennis, At Large #14	September 30, 2021

Indicate which member(s) represent each of the “Other Representation” categories listed below.

	Yes	No
Low Income Representative	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disabled Representative	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supportive Services Provider Representative	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Health Care Provider Representative	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Family Caregiver Representative	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Local Elected Officials	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Individuals with Leadership Experience in Private and Voluntary Sectors	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Explain any **"No"** answer(s): _____

Explain any expiring terms – have they been replaced, renewed, or other?

Briefly describe the local governing board’s process to appoint Advisory Council members:

Each new vacancy occurring on the Council is declared by Board Order. The Clerk of the Board’s Office is then instructed to advertise each vacancy for a period of 20 days prior to the filling of each seat to encourage and permit interested members of the public to apply. Vacancies are identified on the County’s website. Member at Large applicants are interviewed by the Council’s Membership Committee; Local Committee Seats are selected by the cities (usually the City Councils). All new appointments to the Council are made by Board Order. New members are given an orientation and advised of their duty to file FORM 700 and to complete ethics training for public officials as required by the Fair Political Practices Commission. Members are also provided video training on the Brown Act and the County’s own Better Governance Ordinance. Expired terms are renewed by mutual agreement.

2020-2024 Four-Year Area Planning Cycle

This section must be completed and submitted annually. The Older Americans Act Reauthorization Act of 2016 designates legal assistance as a priority service under Title III B [42 USC §3026(a)(2)] ¹² CDA developed *California Statewide Guidelines for Legal Assistance* (Guidelines), which are to be used as best practices by CDA, AAAs and LSPs in the contracting and monitoring processes for legal services, and located at:

https://aging.ca.gov/Providers_and_Partners/Legal_Services/#pp-gg

1. Specific to Legal Services, what is your AAA's Mission Statement or Purpose Statement? Statement must include Title IIIB requirements: **For the provision of Legal Services, the AAA contracts with Contra Costa Senior Legal Services (CCSLS). The mission is to ensure justice, dignity, health, security, maximum autonomy and independence to older residents of Contra Costa, with a particular emphasis on those with the greatest economic and social need. They provide free legal advice, representation and education to elderly residents of Contra Costa County. The most urgent objective is to resolve legal problems that are adversely affecting basic needs of the elderly such as food, shelter, health care, and freedom from physical, psychological or economic abuse.**
2. Based on your local needs assessment, what percentage of Title IIIB funding is allocated to Legal Services? Discuss: **11 % of adequate proportion of unallocated Title IIIB funding is directed to Legal Services.**
3. Specific to Legal Services, has there been a change in your local needs in the past four years? If so, please identify the change (include whether the change affected the level of funding and the difference in funding levels in the past four years). **Yes, there has been a 10% increase in clients seen in the past 4 years, it does not account for the number of people turned away either because the matter is not one that they could have helped them with or because of the lack of capacity of the organization to provide services. There was an increase in the level of funding for IIIB legal services. Approximately 27% of cases are housing related, primarily landlord/tenant disputes and eviction defense.**
4. Specific to Legal Services, does the AAA's contract/agreement with the Legal Services Provider(s) (LSPs) specify that the LSPs are expected to use the California Statewide Guidelines in the provision of OAA legal services? **Yes, the agreement does include expectations to use the California Statewide Guidelines in the provision of OAA legal services.**
5. Does the AAA collaborate with the Legal Services Provider(s) to jointly establish specific priorities issues for legal services? If so what are the top four (4) priority legal issues in your PSA? 1.) Prevention of Elder Abuse; 2.) Housing Preservation; 3.) Access to Benefits; and 4.) Access to health care.
6. Specific to Legal Services, does the AAA collaborate with the Legal Services Provider(s) to jointly identify the target population? If so, what is the targeted senior population in your PSA **AND** what mechanism is used for reaching the target population? **Yes Discuss:**

Yes, the AAA collaborates with our legal service provider, CCSLS, to identify our target population. The target population is older adults with the greatest social and economic need. The mechanism for reaching them is through outreach and education at senior centers, nutrition sites, senior housing complexes, community events, and gathering places with diverse racial/ethnic

populations, such as San Pablo and Bay Point. CCSLS distributes brochures about its services in English, Spanish, and several Asian languages. CCSLS recently began outreach at dialysis clinics to advertise free health care directive services. CCSLS employs Spanish speaking staff and provides outreach to immigration fairs. Website can be accessed in many different languages (via Google translate); use of a language line for other languages (recently Farsi and Hindi).

Additionally, CCSLS collaborates with Ombudsman Services to reach those confined in long-term care facilities.

7. Specific to Legal Services, what is the targeted senior population and mechanism for reaching targeted groups in your PSA? Discuss:

The targeted senior population are those with the Greatest Social Need: Isolated, disabled, low-income, and non-English speaking are all risk factors. The Legal Services Provider reaches them through a website that is accessible and includes a video describing their services as well as a blog. They also rely on frequent in-person outreach (over 45 events last year), distribute flyers in senior centers, food bank distribution sites and to Meals on Wheel clients. In addition, they receive referrals from Adult Protective Services, Family Justice Centers, Ombudsman Services, Contra Costa Bar Assn., local Senior Centers, Information & Assistance, etc.

8. How many legal assistance service providers are in your PSA? Complete table below.

Fiscal Year	# of Legal Assistance
2020-2021	1
2021-2022	1
2022-2023	<i>Leave Blank until 2022</i>
2023-2024	<i>Leave Blank until 2023</i>

6 For Information related to Legal Services, contact Chisorom Okwuosa at 916 419-7500 or chisorom.okwuosa@aging.ca.gov

9. Does your PSA have a hotline for legal services? **No, Discuss:** There is no senior specific hotline. There was a statewide Senior Legal Hotline that was funded by a Model Grant. It no longer exists, but Bay Area Legal Services does offer a Help Line for eligible clients.

10. What methods of outreach are Legal Services providers using? **Discuss:** The Legal Services Provider conducts outreach through a website that is accessible and includes a video describing their services as well as a blog. They also rely on frequent in-person outreach (over 45 events last year), distribute flyers in senior centers, food bank distribution sites and to Meals on Wheel clients. In addition, they receive referrals from Adult Protective Services, Family Justice Centers, Ombudsman Services, Contra Costa Bar Association, local Senior Centers, Information & Assistance, etc.

11. What geographic regions are covered by each provider? **Complete table below:**

Fiscal Year	Name of Provider	Geographic Region covered
2020-2021	Contra Costa Senior Legal Services	Contra Costa County
2021-2022	Contra Costa Legal Services	Contra Costa County
2022-2023	<i>Leave Blank until 2022</i>	<i>Leave Blank until 2022</i>
2023-2024	<i>Leave Blank until 2023</i>	<i>Leave Blank until 2023</i>

12. Discuss how older adults access Legal Services in your PSA: **Discuss:** Older Adults can access the Legal Service provider at senior centers and at the agency's office in person or by telephone. It also conducts clinics at senior housing sites, assisted living facilities, and has staff who can travel to the home of an older adult who is homebound and in need of urgent services.

13. Identify the major types of legal issues that are handled by the Title IIIB legal provider(s) in your PSA. Discuss (please include new trends of legal problems in your area): **Discuss:** The majority of cases handled by Contra Costa Senior Legal Services have to do with eviction and other housing issues. Other issues include debtors' rights and planning for incapacity.

- Housing: The title III Legal provider assists seniors with problems relating to housing, including assistance with publicly subsidized housing, eviction defense, improving housing conditions, lockouts and utility shut offs.
- Elder Abuse: The title III Legal provider assists victims of abuse to enforce their rights against their abusers. Services include advising seniors about financial elder abuse, fraud and senior scams; assisting seniors in obtaining Elder Abuse Restraining Orders; and, advising and assisting clients victimized by identity theft or fraud.
- Consumer and Individual Rights: The Title III legal provider advises debtors about their rights, assist with debt collector lawsuits, and with resolution of some contract disputes. It also drafts powers of attorney and Advance Health Care Directives.

- Public Benefits: The Title III legal advisor assists with waivers and reconsiderations in SSI overpayment matters.
- It also engages in planning for incapacity (Advance Health Care Directives and Durable Powers of Attorney) for older residents of the County

Prior to the recent outbreak of the coronavirus, the most urgent trends concerned threats to housing and economic stability. These issues are likely to become even more pronounced in light of the health crisis affecting our community.

- 14.** In the past four years, has there been a change in the types of legal issues handled by the Title IIIB legal provider(s) in your PSA? **Yes, Discuss:** The legal provider is now able to handle a limited number of Social Security, SSI and Medi-Cal matters as well as expanding services for incapacity planning thanks to the pro bono volunteers.
- 15.** What are the barriers to accessing legal assistance in your PSA? Include proposed strategies for overcoming such barriers. **Discuss:** The Legal Services provider is small and has a limited ability to conduct outreach in languages other than Spanish and English. The Legal Services provider is endeavoring to use volunteers to address this barrier. Seniors also have difficulty with transportation. While services are offered by telephone, many legal issues require review of documents or in person assessment of capacity. The legal services provider is collaborating with other agencies such as the Family Justice Center to provide services in the western and eastern portions of the county.
- 16.** What other organizations or groups does your legal service provider coordinate services with? **Discuss:** They coordinate services with Adult Protective Services, Family Justice Centers, Ombudsman Services, Contra Costa Bar Association, local Senior Centers, Information & Assistance, Meals on Wheels Diablo Region, etc. In addition, they work on many collaborative projects including the Elder Abuse Prevention Project (multiple agencies), the Resident Empowerment Program (Ombudsman Services), and Pop up Legal Clinics (the Food Bank), etc.

SECTION 20. FAMILY CAREGIVER SUPPORT PROGRAM

Notice of Intent for Non-Provision of FCSP Multifaceted Systems of Support Services Older Americans Act Reauthorization Act of 2016, Section 373(a) and (b)

2020-2024 Four-Year Planning Cycle

Based on the AAA's review of current support needs and services for **family caregivers** and **grandparents** (or other older relative of a child in the PSA), indicate what services the AAA **intends** to provide using Title III E and/or matching FCSP funds for both family caregivers and grandparents/older relative caregivers.

Check YES or NO for each of the services* identified below and indicate if the service will be provided directly or contracted. **If the AAA will not provide a service, a justification for each service is required in the space below.**

Family Caregiver Services

Category	2020-2021	2021-2022	2022-2023	2023-2024
Family Caregiver Information Services	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	Yes No Direct Contract	Yes No Direct Contract
Family Caregiver Access Assistance	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	Yes No Direct Contract	Yes No Direct Contract
Family Caregiver Support Services	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	Yes No Direct Contract	Yes No Direct Contract
Family Caregiver Respite Care	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	Yes No Direct Contract	Yes No Direct Contract
Family Caregiver Supplemental Services	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes No Direct <input checked="" type="checkbox"/> Contract	Yes No Direct Contract	Yes No Direct Contract

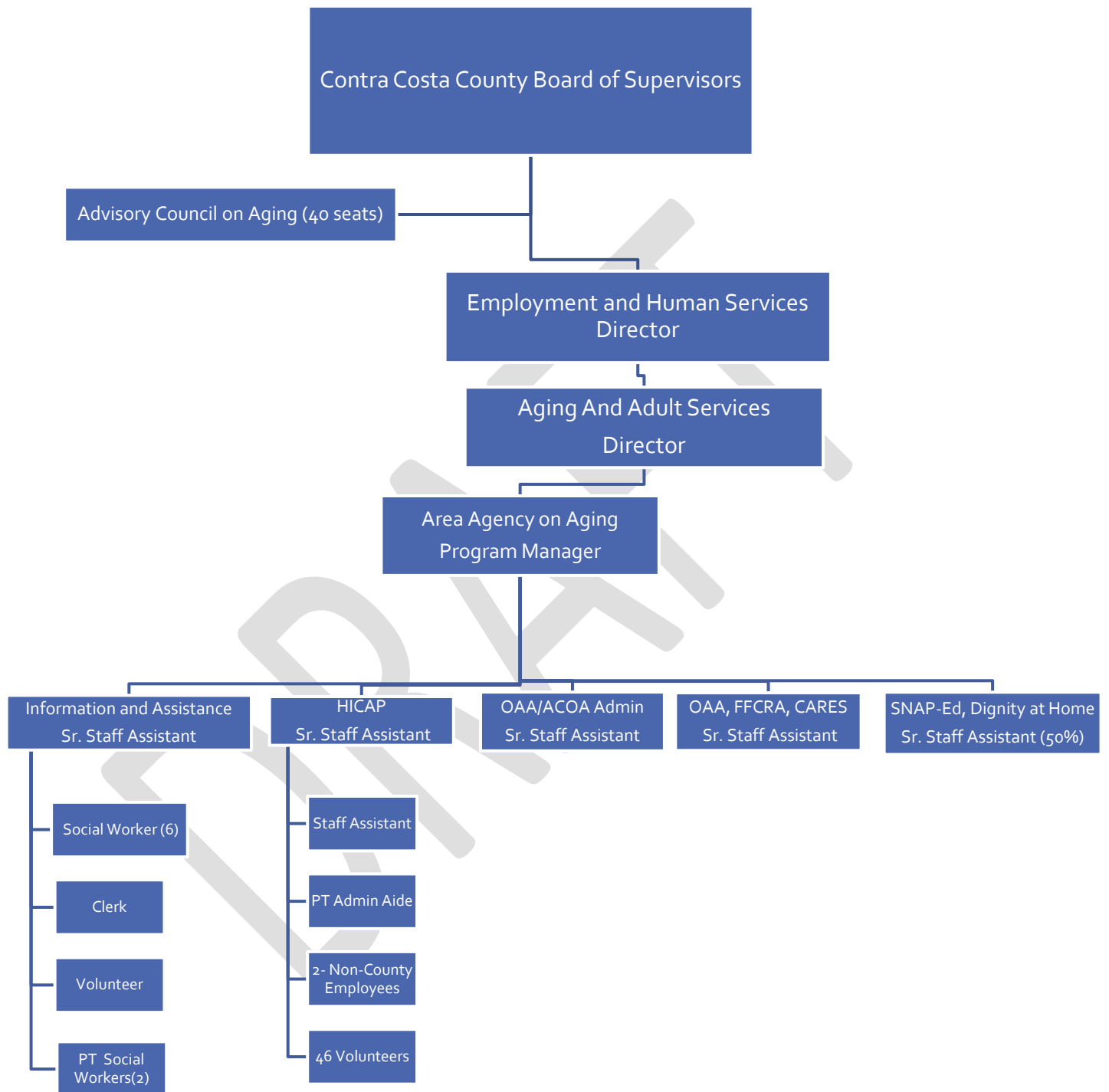
Grandparent Services

Category	2020-2021	2021-2022	2022-2023	2023-2024
Grandparent Information Services	Yes <input checked="" type="checkbox"/> No Direct <input type="checkbox"/> Contract	Yes <input checked="" type="checkbox"/> No Direct <input type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract
Grandparent Access Assistance	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Direct <input checked="" type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract
Grandparent Support Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Direct <input checked="" type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract
Grandparent Respite Care	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Direct <input checked="" type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract
Grandparent Supplemental Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Direct <input checked="" type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract	Yes <input type="checkbox"/> No Direct <input type="checkbox"/> Contract

Justification: For each service category checked “no”, explain how it is being addressed within the PSA. The justification must include the following:

- Provider name and address of agency: Information & Assistance, 400 Ellinwood, Pleasant Hill, CA
- Description of the service: Grandparent information services. AAA's Information & Assistance team provides resources and referrals to callers in need.
- Where the service is provided (entire PSA, certain counties, etc.): Contra Costa County
- Information that influenced the decision not to provide the service (research, needs assessment, survey of senior population in PSA, etc.): Currently have only one provider of Grandparent Caregiver services, the other provider quit late last year. At this time Information & Assistance is able to provide referrals and resources to those who need help.
- How the AAA ensures the service continues to be provided in the PSA without the use of Title III-E funds: call volume can be handled.
- Although the contracted agency, Uplift Family Services, is does not receive OAA funding for other Information Services, they provide them as part of their public and community education activities.

SECTION 21 - ORGANIZATION CHART



DRAFT