



**San Bernardino County Area Agency on Aging
Planning and Service Area 20
2016—2020 Area Plan
2017—2018 Area Plan Update**



Aging and Adult Services

APPROVED

TRANSMITTAL LETTER
FY 2017-2018 Annual Area Plan Update

AAA Name: County of San Bernardino
Department of Aging and Adult Services

PSA Number 20

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. Robert A. Lovingood, Chairman

Governing Board Chairman¹

April 18, 2017
Date

2. Luella G. Hairston, Esq., Chair

Advisory Council Chair

March 15, 2017
Date

3. Sharon Nevins, Interim Director

Area Agency Director

March 15, 2017
Date

¹ Original signatures or official signature stamps are required.

AREA PLAN UPDATE (APU) CHECKLIST

PSA 20

Check one: **FY 17-18** **FY 18-19** **FY 19-20**

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		
9	F) Title IIIB/VIIA Long-Term Care Ombudsman Objectives	<input checked="" type="checkbox"/>	
9	G) Title VIIA Elder Abuse Prevention Objectives	<input checked="" type="checkbox"/>	
10	H) Service Unit Plan (SUP) Objectives and LTC Ombudsman Program Outcomes	<input checked="" type="checkbox"/>	
18	I) 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 2016-2020 Area Plan:</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:		
9	System-Building and Administration	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	Title IIIB-Funded Programs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	Title IIIB-Transportation	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	Title IIIB-Funded Program Development/Coordination (PD or C)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	Title IIIC-1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	Title IIIC-2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	Title IIID	<input type="checkbox"/>	<input checked="" type="checkbox"/>
20	Title IIIE-Family Caregiver Support Program	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	Title V-SCSEP Program	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	HICAP Program	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14	Notice of Intent-to Provide Direct Services	<input type="checkbox"/>	<input checked="" 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 checked="" type="checkbox"/>	<input type="checkbox"/>

2017—2018 Area Plan Update

Table of Contents

Topic	Page
REQUIRED COMPONENTS	
Transmittal Letter	i
2017-18 Area Plan Checklist	ii
Introduction	1
Description of the Planning and Service Area Demographic Information	2
Public Hearings	3
Goals and Objectives	6
Service Unit Plan Objectives Guideline	12
Legal Assistance	37
UPDATED COMPONENTS	
Governing Board	41
Advisory Council	42
Title III E Family Caregiver Support Program	45
Organizational Chart	46
Attachments	47

Introduction

In accordance with legislation (22 CCR § 7340(b)) and Program Memorandum 17-02, the Area Plan Update includes relevant information reflecting changes to the 2016-2020 Area Plan.

Required Sections to be Updated and Sections with Changes

- Description of the Planning and Service Area
 - Demographic Information
- Public Hearings
- Goals and Objectives
- Service Unit Plan Objectives
- Legal Assistance
- Governing Board
- Advisory Council
- Organizational Chart

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Demographic Data**2016 California Department of Aging Population Demographic Projections for San Bernardino County**

The data from the California Department of Aging (CDA) was prepared October 2015 as part of the Intrastate Funding Formula (IFF) and represents the latest available data. This data was included in the 2016-2020 Area Plan.

	Population 60+	Non-Minority 60+	Minority 60+	Low Income 60+	Medi-Cal Eligible 60+
Number of Persons	346,805	180,947	165,858	44,975	72,893
Percent of California 60+ Population	4.56%				
Percent of San Bernardino County Population 60+	N/A	52.18%	47.82%	12.97%	21.02%

Total California population 60 + = 7,605,654

	Geo. Isolation 60+	SSI/SSP 65+	Population 75+	Lives Alone 60+	Non-English 60+
Number Of Persons	21,182	23,543	92,011	52,710	15,950
Percent of San Bernardino County Population 60+	6.11%	6.79%	26.53%	15.20%	4.60%

Source: California Aging Population Demographic Projections for Interstate Funding Formula http://www.aging.ca.gov/Data_and_Statistics/

SECTION 7. PUBLIC HEARINGS

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, OAA 2006 306(a)

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
<u>2016-17</u>					
<u>Public Meetings</u>					
	October 22, 2015	Yucca Valley Senior Center	16	No	No
	October 28, 2015	Rialto Senior Center	18	Yes	No
	November 5, 2015	Redlands Senior Center	7	No	No
	November 10, 2015	Crest Forest Senior Citizens Club	85	No	No
	November 16, 2015	Montclair Senior Center	61	No	No
	December 8, 2015	Department of Aging and Adult Services (DAAS), Victorville Office	20	No	No
	December 10, 2015	Trona Community Senior Center	6	No	No
<u>Public Hearing(s)</u>					
	February 17, 2016	Senior Affairs Commission (SAC) DAAS San Bernardino	32	No	No
	March 16, 2016	Senior Affairs Commission (SAC) DAAS San Bernardino	26	No	No
2017-18	March 15, 2017	Senior Affairs Commission (SAC) DAAS San Bernardino	32	No	No
2018-19					
2019-20					

² A translator is not required unless the AAA determines a significant number of attendees require translation services.

³ AAAs are encouraged to include individuals in LTC facilities in the planning process, but hearings are not required to be held in LTC facilities.

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 older individuals with disabilities.

The public hearing was advertised in accordance with the California Code of Regulations. All contracted providers, incorporated cities, and American Indian tribal governments in San Bernardino County received written notice. Additionally, notices of the public hearing were distributed by Senior Information and Assistance staff and posted at DAAS facilities.

Members of the senior community with disabilities were in attendance. The public hearing was not held at a long term care facility.

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.

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:

During public meetings and hearings for the 2016-2020 Area Plan Area Agency on Aging (AAA) staff described the priority services, what services were included in each category, and the minimum percentage of funds proposed. A written explanation was also distributed with the Agenda at each public meeting. The public did not comment on the subject.

In accordance with the California Code of Regulations, the minimum percentages were established for the four years (2016 thru 2020) of the Area Plan.

5. Summarize the comments received concerning minimum percentages of Title IIIB funds to meet the adequate proportion of funding for priority services.

See number 4 above.

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

- Two persons, including a 97 year-old, who regularly attend the Crest Forest congregate meal program gave positive testimony about the meals and the “fellowship” that the setting provides.
- Without providing specifics, a senior expressed concerns about elderly abuse reporting, food banks, and the mental health needs of seniors. These issues are generally outside the scope of the Older Americans Act programs.

Senior Affairs Commission minutes from the public hearing are included in the attachment.

7. Note any changes to the Area Plan which were a result of input by attendees.**From the development of the 2016-2020 Area Plan**

- Staff will address getting more farmers markets certified. This will enable seniors to use the Farmers Market coupons at more locations throughout the County.
- Also, objectives addressing transportation coordination and involvement with the various transit providers in the County are included.

From the development of the 2017-2018 Area Plan Update

- No changes to the document resulted from the testimony.

Section 9. Area Plan Narrative Goals And Objectives

Goals

No changes are proposed to the two goals. The first one addresses the actions, advocacy and responsibility of the Department. The second goal recognizes the advocacy role of the Senior Affairs Commission.

Objectives

Goal 1 Objectives:

- The majority of the objectives have an initial end date of June 30, 2018.
- The two annual objectives have been worked on and will continue to be addressed annually.
- All objectives are continued.

Goal 2, SAC Objectives:

- The annual objectives have been worked on and will continue to be addressed annually.
- The Legislative Committee has been reaching out to the staff of local elected state representatives to attend their meetings. The objective (S.4.) was revised to reflect their outreach effort.
- The Nutrition Committee changed a word (“quarterly”) to reflect the contract language (“mandatory”) with the providers. Accordingly, the objective (S.5.) is revised.
- The work of the Healthy Aging Committee has an end date of June 30, 2018.

Goal No. 1:

To address and strengthen advocacy for the unmet needs of older adults and adults with disabilities by facilitating access to programs, services, and other support systems through the collaboration with public entities, private organizations, families, and caregivers.

Rationale:

The results of the AAA's needs assessment show the need to continue to improve methods of information dissemination regarding the various programs and services provided to seniors and adults with disabilities. Public meeting participants also voiced their need for increased public awareness of programs and services. The AAA also wants to provide services in an efficient and coordinated manner to maximize program resources and effectiveness.

With the anticipated ongoing growth in our senior population and ongoing limited funding and resources, maximizing services to older adult and adults with disabilities is essential. The AAA is committed to providing leadership and to develop and/or enhance collaborative partnerships, which will address the needs of older adults and adults with disabilities. By working with other organizations, the continuum of care will be strengthened and new initiatives may be developed.

List Objective Number(s) and Objective(s) [Refer to CCR Article 3, Section 7300 (c)]	Projected Start and End Dates	Title IIB Funded PD or C⁴	Update Status⁵
1. The Ombudsman Program will contact the Department of Behavioral Health to explore potential program and funding opportunities available with their programs including but not limited to the Mental Health Services Act.	July 1, 2016 thru June 30, 2018		Continued
2. The Ombudsman Program will work with financial institutions on a presentation that addresses elder abuse awareness and education, and financial exploitation of their clients, including the caregivers of their clients. This presentation will be incorporated into training for Ombudsman volunteers.	July 1, 2016 thru June 30, 2018		Continued
3. The IID provider will collaborate with public and/or private entities to implement the "Walk With Ease" program at five (5) senior sites. The program is three times a week for six weeks at each site. The purpose of this evidence-based program is to utilize walking to reduce pain, increase balance and strength, and improve overall health.	Annual Objective		Continued

⁴ 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.

⁵ Use for the Area Plan Updates only to indicate if the objective is New, Continued, Revised, Completed, or Deleted.

4. AAA staff will identify and collaborate with public and/or private entities to research, develop, and implement an evidence-based Chronic Disease Self-Management Education (CDSME) program.	July 1, 2016 thru June 30, 2018		Continued
5. The Senior Community Service Employment Program (SCSEP) manager will develop a SCSEP Area Representative handbook. The result will be uniform administration of the Title V program, a consistent participant experience, as well as definitive expectations and evaluative measures for the Area Representative position.	July 1, 2016 thru June 30, 2018		Continued
6. The Senior Community Service Employment Program (SCSEP) manager will develop and implement SCSEP host agency training modules to orient and guide host agencies in their respective program responsibilities. The host agency training will ensure that participants are receiving valuable and effective work-based opportunities.	July 1, 2016 thru June 30, 2018		Continued
7. The Deputy Director or designee will attend the Public and Specialized Transportation Advisory and Coordination Council to advocate for improved transportation for the senior and disabled community.	Annual Objective. Four to six meetings per year		Continued
8. The Area Planner will coordinate with the regional transportation agency, SANBAG; the Consolidated Transportation Services Agency's; the County's six transit agency's; not for profits that have a transportation component; and other County of San Bernardino departments to address regional and local transportation issues and mobility management. Concerns include, but are not limited to: Barstow medical transportation; Needles medical transportation to Arizona, Nevada, and Barstow/Victorville; cross-county transportation needs; rural connectivity; expanding and maintaining the existing volunteer driver programs; and development of innovative and sustainable transportation programs. The result of coordinating with the non-OAA funded agencies and organizations will be measured by progress and or solutions to regional and local transportation issues.	July 1, 2016 thru June 30, 2020		Continued
9. The AAA will work with community partners to develop and present a diversity and cultural competency training for the Senior Affairs Commission and the contracted providers of services.	July 1, 2016 thru June 30, 2018		Continued

<p>10. The AAA staff, including Senior Information and Assistance, will distribute Scam Alerts at the County level. The Scam Alert system is a quick and effective way to communicate information about current scams to staff and customers. Distribution and discussion of the Scam Alerts includes dissemination to seniors at a variety of venues. SIA staff are involved in outreach throughout the community making contact with seniors at health fairs, congregate meals, senior centers, and other locations; and circulating the Scam Alerts to the contracted providers is also an essential contact point to reach consumers. The issues to be addressed include but are not limited to who receives the Scam Alerts, review of the online posting to make sure it is distinguishable from general information, and making sure board and care facilities and skilled nursing facilities are included.</p>	<p>July 1, 2016 thru June 30, 2018</p>		<p>Continued</p>
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Goal No. 2:

The Senior Affairs Commission (SAC) will advocate on behalf of seniors who reside in San Bernardino County.

Rationale:

In accordance with the Older Americans Act, the Older Californians Act, and San Bernardino County Ordinance 3897, one of SAC’s responsibilities is to act as an independent advocate for older persons in the County. By developing this goal, the SAC members recognize and formalize their responsibility and provide guidance to the various SAC committee meetings.

List Objective Number(s) and Objective(s) [Refer to CCR Article 3, Section 7300 (c)]	Projected Start and End Dates	Title IIIB Funded PD or C ⁶	Update Status ⁷
<p>SAC.1. In order to promote access to services for a full and complete life, the Access Committee will work with government, the housing sector and transportation providers to insure the best possible access to a broad spectrum of services for the senior community. Targeted activities include, but are not limited to, review of senior housing for universal design; review of bus stops for accessibility and location; attendance at monthly meetings of the six transit agencies in the County; and acting as a forum for senior access concerns. The minutes of the Access Committee meetings will document the Committee’s advocacy efforts</p>	Annual Objective		Continued
<p>SAC.2. The Healthy Aging Committee will implement the “Health Fair/Resource Fair Planning Guide” by engaging a community in the County that wishes to participate in a pilot project of putting on a Health Fair. Activities include introducing the Planning Guide to the pilot community, acting in an advisory role to their team, and evaluating the effectiveness of the Planning Guide which may then warrant modifications after the event.</p>	July 1, 2016 thru June 30, 2018		Continued

⁶ 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.

⁷ Use for the Area Plan Updates only to indicate if the objective is New, Continued, Revised, Completed, or Deleted.

<p>SAC.3. The Intergenerational Committee (IG) will focus efforts on education, awareness, and support of those adult caregivers caring for an older adult. Emphasis will be placed on those caregivers caring for aging adults, while supporting children, also referred to as the “sandwich generation.” The IG Committee will participate in one educational outreach activity annually.</p>	Annual Objective		Continued
<p>SAC.4. The Legislative Committee will regularly meet with a representative(s) from the: 1) Legislative Research Unit of the County, 2) <i>Planning and Service Area (PSA) 20 California Senior Legislature</i>, and 3) <i>local elected state legislative staff</i>, to address legislative priorities and proposals that will benefit older individuals.</p>	Annual Objective		Revised
<p>SAC.5. The Nutrition Committee will conduct twenty (20) site visits annually to observe and participate in a congregate meal. The members will make note of the quality of the meal, the on-site signage, and the donation process. Observations will be forwarded to the Nutrition Analyst to address discrepancies with the Nutrition providers’ contract. Ideas for best practices will be gathered and shared at the <i>quarterly mandatory</i> nutrition meetings.</p>	Annual Objective		Revised

Section 10 - Service Unit Plan (SUP) Objectives

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.

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.

1. Personal Care (In-Home)

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	50	1	
2017-2018	50	1	
2018-2019			
2019-2020			

2. Homemaker (In-Home)

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	500	1	
2017-2018	500	1	
2018-2019			
2019-2020			

3. Chore (In-Home)

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	400	1	
2017-2018	400	1	
2018-2019			
2019-2020			

4. Home-Delivered Meal

Unit of Service = 1 meal

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	370,000	1	
2017-2018	360,000	1	
2018-2019			
2019-2020			

5. Adult Day/ Health Care (In-Home)

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	100	1	
2017-2018	100	1	
2018-2019			
2019-2020			

6. Case Management (Access)

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017			
2017-2018			
2018-2019			
2019-2020			

7. Assisted Transportation (Access)

Unit of Service = 1 one-way trip

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	9,000	1	
2017-2018	9,000	1	
2018-2019			
2019-2020			

8. Congregate Meals

Unit of Service = 1 meal

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	315,000	1	
2017-2018	312,600	1	
2018-2019			
2019-2020			

9. Nutrition Counseling

Unit of Service = 1 session per participant

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017			
2017-2018			
2018-2019			
2019-2020			

10. Transportation (Access)

Unit of Service = 1 one-way trip

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	50,000	1	
2017-2018	50,000	1	
2018-2019			
2019-2020			

11. Legal Assistance

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	5,000	1	
2017-2018	5,000	1	
2018-2019			
2019-2020			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	11,000	1	
2017-2018	10,000	1	
2018-2019			
2019-2020			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	30,000	1	
2017-2018	30,000	1	
2018-2019			
2019-2020			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2016-2017	11,000	1	
2017-2018	11,000	1	
2018-2019			
2019-2020			

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

- Each **Title IIIB** “Other” service must be an approved NAPIS Program 15 service listed 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 1–14 and 16. (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.

Other Supportive Service Category

Unit of Service

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2016-2017			
2017-2018			
2018-2019			
2019-2020			

Title IIIB, Other Supportive Services Category

Residential Repairs /Modifications

Unit of Service 1 Modification

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2016-2017	80	1	
2017-2018	80	1	
2018-2019			
2019-2020			

Senior Center Activities

Unit of Service 1 Hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2016-2017	6,500	1	
2017-2018	6,500	1	
2018-2019			
2019-2020			

Cash/Material Aid

Unit of Service 1 Assistance

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2016-2017	125	1	
2017-2018	125	1	
2018-2019			
2019-2020			

Community Education

Unit of Service 1 Activity

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2016-2017	400	1	
2017-2018	400	1	
2018-2019			
2019-2020			

Housing**Unit of Service 1 Hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2016-2017	250	1	
2017-2018	250	1	
2018-2019			
2019-2020			

Interpretation/Translation**Unit of Service 1 Contact**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2016-2017	1,000	1	
2017-2018	1,000	1	
2018-2019			
2019-2020			

Mobility Management Activities**Unit of Service 1 Hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2016-2017	600	1	
2017-2018	600	1	
2018-2019			
2019-2020			

Personal Affairs Assistance**Unit of Service 1 Contact**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2016-2017	1,500	1	
2017-2018	1,500	1	
2018-2019			
2019-2020			

16. Title IIID/ Disease Prevention and Health Promotion

Instructions for Title IIID Disease Prevention and Health Promotion: Enter the proposed units of service and the Program Goal and Objective number(s) that provides a narrative description of the program and explains how the service activity meets the criteria for evidence-based programs described in PM 15-10.

Unit of Service = 1 contact

Service Activities: The “Walk with Ease” evidence based program will be at five sites throughout the County. Each class is six weeks and 3 times per week.

The “Walk with Ease” program is listed on the National Council on Aging website as a Title III-D Highest Tier Evidence-Based Health Promotion/Disease Prevention Program as referenced in Program Memo 15-10. According to the Arthritis Foundation, participants in the “Walk with Ease” program experienced decreased disability; improvements in levels of pain, fatigue, stiffness and self-confidence; and better perceived control over arthritis, balance, strength and walking pace.

Title IIID/ Disease Prevention and Health Promotion: Enter required program goal and objective numbers in the Title III D Service Plan Objective Table below:

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (Required)
2016-2017	1,080	1	3
2017-2018	1,000	1	3
2018-2019			
2019-2020			

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

2016–2020 Four-Year Planning Cycle

As mandated by the Older Americans Act, 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 enhancing the quality of life and care of residents.

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 LTC Ombudsman Program. [OAA Section 712(a)(3),(5)]

Measures and Targets:

A. Complaint Resolution Rate (AoA Report, Part I.E, Actions on Complaints)

The average California complaint resolution rate for FY 2013-2014 was 73%.

1. FY 2014-2015 Baseline Resolution Rate: Number of complaints resolved <u>1,107</u> + Number of partially resolved complaints <u>261</u> divided by the Total Number of Complaints Received <u>1,635</u> = Baseline Resolution Rate <u>84%</u> FY 2016-17 Target Resolution Rate <u>85%</u>
2. FY 2015-2016 Baseline Resolution Rate: Number of complaints resolved <u>1,237</u> + Number of partially resolved complaints <u>254</u> divided by the Total Number of Complaints Received <u>1,662</u> = Baseline Resolution Rate <u>90%</u> FY 2017-18 Target Resolution Rate <u>85%</u>
3. FY 2016-2017 Baseline Resolution Rate: Number of complaints resolved _____ + Number of partially resolved complaints _____ divided by the Total Number of Complaints Received _____ = Baseline Resolution Rate _____% FY 2018-19 Target Resolution Rate _____%

4. FY 2017-2018 Baseline Resolution Rate:
 Number of complaints resolved _____ + Number of partially resolved complaints _____
 divided by the Total Number of Complaints Received _____ = Baseline Resolution Rate
 _____ %
 FY 2019-20 Target Resolution Rate _____ %

Program Goals and Objective Numbers: **Goal 1. Objectives 1 and 2**

B. Work with Resident Councils (AoA Report, Part III.D.8)

1. FY 2014-2015 Baseline: number of Resident Council meetings attended **69**
 FY 2016-2017 Target: **45**
2. FY 2015-2016 Baseline: number of Resident Council meetings attended **45**
 FY 2017-2018 Target: **25**
3. FY 2016-2017 Baseline: number of Resident Council meetings attended _____
 FY 2018-2019 Target: _____
4. FY 2017-2018 Baseline: number of Resident Council meetings attended _____
 FY 2019-2020 Target: _____

Program Goals and Objective Numbers: **Goal 1. Objectives 1 and 2**

C. Work with Family Councils (AoA Report, Part III.D.9)

1. FY 2014-2015 Baseline number of Family Council meetings attended **2**
 FY 2016-2017 Target: **1**
2. FY 2015-2016 Baseline number of Family Council meetings attended **0**
 FY 2017-2018 Target: **1**
3. FY 2016-2017 Baseline number of Family Council meetings attended _____
 FY 2018-2019 Target: _____
4. FY 2017-2018 Baseline number of Family Council meetings attended _____
 FY 2019-2020 Target: _____

Program Goals and Objective Numbers: **Goal 1. Objectives 1 and 2**

D. Consultation to Facilities (AoA Report, Part III.D.4) Count of instances of LTC Ombudsman representatives' interactions with facility staff for the purpose of providing general information and assistance unrelated to a complaint. Consultation may be accomplished by telephone, letter, email, fax, or in person.

1. FY 2014-2015 Baseline: number of consultations **348**
 FY 2016-2017 Target: **325**
2. FY 2015-2016 Baseline: number of consultations **619**
 FY 2017-2018 Target: **350**
3. FY 2016-2017 Baseline: number of consultations _____
 FY 2018-2019 Target: _____
4. FY 2017-2018 Baseline: number of consultations _____
 FY 2019-2020 Target: _____

Program Goals and Objective Numbers: **Goal 1. Objectives 1 and 2**

E. Information and Consultation to Individuals (AoA Report, Part III.D.5) Count the number of LTC 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. Consultation may be accomplished by: telephone, letter, email, fax, or in person.

1. FY 2014-2015 Baseline: number of consultations <u>1,397</u> FY 2016-2017 Target: <u>1,350</u>
2. FY 2015-2016 Baseline: number of consultations <u>1,770</u> FY 2017-2018 Target: <u>1,500</u>
3. FY 2016-2017 Baseline: number of consultations _____ FY 2018-2019 Target: _____
4. FY 2017-2018 Baseline: number of consultations _____ FY 2019-2020 Target: _____
Program Goals and Objective Numbers: <u>Goal 1. Objectives 1 and 2</u>

F. Community Education (AoA Report, Part III.D.10) 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.

1. FY 2014-2015 Baseline: number of sessions <u>54</u> FY 2016-2017 Target: <u>50</u>
2. FY 2015-2016 Baseline: number of sessions <u>45</u> FY 2017-2018 Target: <u>25</u>
3. FY 2016-2017 Baseline: number of sessions _____ FY 2018-2019 Target: _____
1. FY 2017-2018 Baseline: number of sessions _____ FY 2019-2020 Target: _____
Program Goals and Objective Numbers: <u>Goal 1. Objectives 1 and 2</u>

G. Systems Advocacy

In the box below, in narrative format, provide at least one new priority systemic advocacy effort the local LTC Ombudsman Program will engage in during the fiscal year. If the systemic advocacy effort is a multi-year initiative, provide a systemic advocacy objective that explains progress made in the initiative during the prior fiscal year and identifies specific steps to be taken during the upcoming fiscal year. A new effort or a statement of progress made and goals for the upcoming year must be entered each year of the four-year cycle.

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 promote person-centered care and reduce the use of anti-psychotics, 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.

Enter information in the box below.

Systemic Advocacy Effort(s) for the current fiscal year 17-18

The LTC Ombudsman Program will work with Knolls West Post Acute facility to improve LTC residents' quality of care and quality of life. Responsibility will include identifying most common complaints and/or care issues affecting the residents and work to improve those issues for the benefit of the residents.

**Outcome 2. Residents have regular access to a LTC Ombudsman.
[(OAA Section 712(a)(3)(D), (5)(B)(ii)]**

Measures and Targets:

A. Facility Coverage (other than in response to a complaint), (AoA Report, Part III.D.6)

Percentage of nursing facilities within the PSA that were visited by an LTC 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 2014-2015 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint **29** divided by the total number of Nursing Facilities **54** = Baseline **54%**

FY 2016-2017 Target: **50%**

2. FY 2015-2016 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint **38** divided by the total number of Nursing Facilities **52** = Baseline **73%**

FY 2017-2018 Target: **55%**

3. FY 2016-2017 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint _____ divided by the total number of Nursing Facilities _____ = Baseline _____%

FY 2018-2019 Target: _____%

4. FY 2017-2018 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint _____ divided by the total number of Nursing Facilities _____ = Baseline _____%

FY 2019-2020 Target: _____%

Program Goals and Objective Numbers: **Goal 1. Objectives 1 and 2**

B. Facility Coverage (other than in response to a complaint) (AoA Report, Part III.D.6)

Percentage of RCFEs within the PSA that were visited by a LTC 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 2014-2015 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint 108 divided by the total number of RCFEs 251 = Baseline 43% FY 2016-2017 Target: 45%
2. FY 2015-2016 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint 144 divided by the total number of RCFEs 245 = Baseline 59% FY 2017-2018 Target: 45%
3. FY 2016-2017 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint _____ divided by the total number of RCFEs _____ = Baseline _____% FY 2018-2019 Target: _____%
4. FY 2017-2018 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint _____ divided by the total number of RCFEs _____ = Baseline _____% FY 2019-2020 Target: _____%
Program Goals and Objective Numbers: Goal 1. Objectives 1 and 2

C. Number of Full-Time Equivalent (FTE) Staff (AoA Report Part III. B.2. - Staff and Volunteers)

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 LTC 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 2014-2015 Baseline: 2.90 FTEs FY 2016-2017 Target: 3.90 FTEs
2. FY 2015-2016 Baseline: 3.9 FTEs FY 2017-2018 Target: 4 FTEs
3. FY 2010-2011 Baseline: _____ FTEs FY 2013-2014 Target: _____ FTEs
4. FY 2010-2011 Baseline: _____ FTEs FY 2014-2015 Target: _____ FTEs

Program Goals and Objective Numbers: **Goal 1. Objectives 1 and 2**

D. Number of Certified LTC Ombudsman Volunteers (AoA Report Part III. B.2. – Staff and Volunteers)

1.	FY 2014-2015 Baseline: Number of certified LTC Ombudsman volunteers <u>29</u> FY 2016-2017 Projected Number of certified LTC Ombudsman volunteers <u>27</u>
2.	FY 2015-2016 Baseline: Number of certified LTC Ombudsman volunteers <u>32</u> FY 2017-2018 Projected Number of certified LTC Ombudsman volunteers <u>25</u>
3.	FY 2016-2017 Baseline: Number of certified LTC Ombudsman volunteers _____ FY 2018-2019 Projected Number of certified LTC Ombudsman volunteers _____
4.	FY 2017-2018 Baseline: Number of certified LTC Ombudsman volunteers _____ FY 2019-2020 Projected Number of certified LTC Ombudsman volunteers _____
Program Goals and Objective Numbers: <u>Goal 1. Objectives 1 and 2</u>	

Outcome 3. LTC Ombudsman representatives accurately and consistently report data about their complaints and other program activities in a timely manner. [OAA 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 Resource System (NORS) data reporting.

Some examples could include:

- Having LTC Ombudsman Program staff and volunteers regularly attend NORS Consistency Training provided by the OSLTCO
- 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

Reporting data improvements will be accomplished by the hiring of additional staff to enter data. Also, a training component will be implemented for current and new staff.

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. **OAA 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.

TITLE VIIA ELDER ABUSE PREVENTION SERVICE UNIT PLAN OBJECTIVES

The agency receiving Title VIIA Elder Abuse Prevention funding is:

Long Term Care Ombudsman Program
 Department of Aging and Adult Services
 San Bernardino County

Fiscal Year	Total # of Public Education Sessions
2016-2017	10
2017-2018	10
2018-2019	
2019-2020	

Fiscal Year	Total # of Training Sessions for Professionals
2016-2017	10
2017-2018	10
2018-2019	
2019-2020	

Fiscal Year	Total # of Training Sessions for Caregivers served by Title III E
2016-2017	1
2017-2018	0
2018-2019	
2019-2020	

Fiscal Year	Total # of Hours Spent Developing a Coordinated System
2016-2017	40
2017-2018	40
2018-2019	
2019-2020	

Fiscal Year	Total # of Copies of Educational Materials to be Distributed	Description of Educational Materials
2016-2017	1,500	Various
2017-2018	1,500	Various
2018-2019		
2019-2020		

Fiscal Year	Total Number of Individuals Served
2016-2017	1,000
2017-2018	1,000
2018-2019	
2019-2020	

TITLE IIIE SERVICE UNIT PLAN OBJECTIVES

CCR Article 3, Section 7300(d)

2012–2016 Four-Year Planning Period

This Service Unit Plan (SUP) uses the five broad federally-mandated service categories defined in PM 11-11. Refer to the CDA Service Categories and Data Dictionary Revisions Effective July 1, 2011 for eligible activities and service unit measures. Specify proposed audience size or units of service for ALL budgeted funds.

Direct and/or Contracted IIIE 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		
2016-2017	# of activities: 150 Total est. audience for above: 1,500	1	
2017-2018	# of activities: 150 Total est. audience for above: 1,500	1	
2018-2019	# of activities: Total est. audience for above:		
2019-2020	# of activities: Total est. audience for above:		
Access Assistance	Total contacts		
2016-2017	11,000	1	
2017-2018	11,000	1	
2018-2019			
2019-2020			

Support Services	Total hours		
2016-2017	3,000	1	
2017-2018	3,000	1	
2018-2019			
2019-2020			
Respite Care	Total hours		
2016-2017	2,000	1	
2017-2018	2,000	1	
2018-2019			
2019-2020			
Supplemental Services	Total occurrences		
2016-2017	40	1	
2017-2018	40	1	
2018-2019			
2019-2020			

Direct and/or Contracted III E 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		
2016-2017	# of activities: 15 Total est. audience for above: 150	1	
2017-2018	# of activities: 15 Total est. audience for above: 150	1	
2018-2019	# of activities: Total est. audience for above:		
2019-2020	# 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		
2016-2017	1,000	1	
2017-2018	1,000	1	
2018-2019			
2019-2020			
Support Services	Total hours		
2016-2017			
2017-2018			
2018-2019			
2019-2020			
Respite Care	Total hours		
2016-2017			
2017-2018			
2018-2019			
2019-2020			
Supplemental Services	Total occurrences		
2016-2017			
2017-2018			
2018-2019			
2019-2020			

SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM (SCSEP)

List all SCSEP monitor sites (contract or direct) where the AAA provides SCSEP enrollment services within the PSA (Do not list host agencies)

Enrollment Location/Name (AAA office, One Stop, Agency, etc.): America's Job Center of California – West Valley
Street Address: 9650 9 th Street, Rancho Cucamonga, CA 91730-4549
Name and title of all SCSEP paid project staff members (Do not list participant or participant staff names): N/A
Number of paid staff 0 Number of participant staff 1
How many participants are served at this site? 4

Enrollment Location/Name (AAA office, One Stop, Agency, etc.): America's Job Center of California – East Valley
Street Address: 658 Brier Street, San Bernardino, CA 92415-0083
Name and title of all SCSEP paid project staff members (Do not list participant or participant staff names): N/A
Number of paid staff 0 Number of participant staff 1
How many participants are served at this site? 7

Enrollment Location/Name (AAA office, One Stop, Agency, etc.): America's Job Center of California – High Desert
Street Address: 17310 Bear Valley Road, Suite 109, Victorville, CA 92395
Name and title of all SCSEP paid project staff members (Do not list participant or participant staff names): N/A
Number of paid staff 0 Number of participant staff 1
How many participants are served at this site? 6

Enrollment Location/Name (AAA office, One Stop, Agency, etc.) San Bernardino County Department of Aging and Adult Services
Street Address: 686 East Mill Street, San Bernardino, CA 92415-0640
Name and title of all SCSEP paid project staff members (Do not list participant or participant staff names): C.J. – Administrative Aide; M.R. – Administrative Aide
Number of paid staff 2 Number of participant staff 0
How many participants are served at this site? This is the administrative office where all official files are kept but no clients are served directly at this location.

**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 must enter State and federal performance target numbers in each AAA’s respective SUP. Please do this in cooperation with the Managing AAA. The Managing 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 Section 3 if your Master Contract contains a provision for using HICAP funds to provide HICAP Legal Services.

STATE & FEDERAL PERFORMANCE TARGETS: In FY 2014, the State Health Insurance Assistance Program (SHIP) was transferred from the Centers for Medicare & Medicaid Services (CMS) to the Administration for Community Living (ACL). ACL has continued CMS’ policy requiring all SHIPs to meet established performance measures. Based on ACL guidelines and to assist AAAs in completing the Service Unit Plan, CDA provides State (1.1 and 1.2), and federal (2.1 through 2.7) performance measures (PM) annually. To download these measures and view definitions, visit <https://www.aging.ca.gov/ProgramsProviders/AAA/Planning/>

Section 1. State Performance Measures

Fiscal Year (FY)	PM 1.1 Clients Counseled (Estimated)	Goal Numbers
2016-2017	2,524	1
2017-2018	2,524	1
2018-2019		
2019-2020		

Fiscal Year (FY)	PM 1.2 Public and Media Events (PAM) (Estimated)	Goal Numbers
2016-2017	195	1
2017-2018	195	1
2018-2019		
2019-2020		

Section 2: Federal Performance Measures

Fiscal Year (FY)	PM 2.1 Total Client Contacts (Estimated)	Goal Numbers
2016-2017	11,127	1
2017-2018	11,127	1
2018-2019		
2019-2020		

Fiscal Year (FY)	PM 2.2 Persons Reached at PAM Events (Estimated)	Goal Numbers
2016-2017	25,000	1
2017-2018	10,000	1
2018-2019		
2019-2020		

Fiscal Year (FY)	PM 2.3 Contacts with Medicare Beneficiaries Due to Disability (Estimated)	Goal Numbers
2016-2017	1,747	1
2017-2018	1,708	1
2018-2019		
2019-2020		

Fiscal Year (FY)	PM 2.4 Low-income Medicare Beneficiary Contacts (Estimated)	Goal Numbers
2016-2017	8,673	1
2017-2018	8,673	1
2018-2019		
2019-2020		

Fiscal Year (FY)	PM 2.5 Contacts with One or More Qualifying Enrollment Topics (Estimated)	Goal Numbers
2016-2017	9,486	1
2017-2018	9,486	1
2018-2019		
2019-2020		

Fiscal Year (FY)	PM 2.6 Total Part D Enrollment/Assistance Contacts (Estimated)	Goal Numbers
2016-2017	5,109	1
2017-2018	5,109	1
2018-2019		
2019-2020		

Fiscal Year (FY)	PM 2.7 Total Counseling Hours (Estimated)	Goal Numbers
2016-2017	5,627	1
2017-2018	5,627	1
2018-2019		
2019-2020		

Section 3: HICAP Legal Services Units of Service (if applicable) ⁸

Not Applicable

Fiscal Year (FY)	3.1 Estimated Number of Clients Represented Per FY (Unit of Service)	Goal Numbers
2016-2017		
2017-2018		
2018-2019		
2019-2020		

Fiscal Year (FY)	3.2 Estimated Number of Legal Representation Hours Per FY (Unit of Service)	Goal Numbers
2016-2017		
2017-2018		
2018-2019		
2019-2020		

Fiscal Year (FY)	3.3 Estimated Number of Program Consultation Hours Per FY (Unit of Service)	Goal Numbers
2016-2017		
2017-2018		
2018-2019		
2019-2020		

⁸ Requires a contract for using HICAP funds to pay for HICAP Legal Services.

Section 18. Legal Assistance

2016-2020 Four-Year Area Planning Cycle

This section must be completed and submitted with the Four-Year Area Plan. Any changes to this Section must be documented on this form and remitted with Area Plan Updates.⁹

1. Specific to Legal Services, what is your AAA's Mission Statement or Purpose Statement? Statement must include Title IIIB requirements:

PSA 20's Legal Services mission is: To ensure justice, dignity, health, security, maximum autonomy, and independence to older Californians by protecting and enforcing the legal rights of individuals and by promoting social change through broad elder rights advocacy. The purpose of the Legal Services Program is to deliver quality, cost-effective services designed to address the unmet legal needs of vulnerable San Bernardino County seniors.

Inland Counties Legal Services (ICLS) Mission Statement is:

"Inland Counties Legal Services pursues justice and equality for low income people through counsel, advice, advocacy, and community education, treating all with dignity and respect."

2. Based on your local needs assessment, what percentage of Title IIIB funding is allocated to Legal Services?

10%

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 change in that more seniors are dealing with landlord/tenant issues, foreclosures, estate planning, bankruptcies and family law issues. Funding had decreased after peaking in fiscal year 2010/2011, but is back on the rise.

2011/12	\$210,500
2012/13	\$185,000
2013/14	\$185,000
2014/15	\$171,000
2015/16	\$191,000
2016/17	\$191,000
2017/18	\$200,000

⁹ For Information related to Legal Services, contact Chisorom Okwuosa at 916 419-7500 or chisorom.okwuosa@aging.ca.gov

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.

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?

No. The goal is to serve every senior with their legal issue. The top four issues are:

1. Landlord/Tenant issues
2. Estate Planning/Wills/Trusts
3. Bankruptcy/Debt Collection
4. Financial Powers of Attorney

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? Discussion:

The Legal Services provider is aware of the targeted population. They respond to all requests for assistance regardless of the individual. Seniors who have low income, live in rural areas, are alone or at risk for victimization are priorities. Regular presence at senior citizen centers and outreach is scheduled; and client intake is done on appointment. Outreach includes urban, rural and desert areas as well as telephone intake for advising on routine legal matters.

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

See 6.

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

Fiscal Year	# of Legal Assistance Services Providers
2016-2017	1
2017-2018	1
2018-2019	
2019-2020	

9. Does your PSA have a hotline for legal services?

Yes. The legal services provider has phone lines dedicated to seniors.

10. What methods of outreach are Legal Services providers using? Discuss:

SIA promotes the program and refers legal concerns to the provider. The provider schedules regular client intake at senior citizen centers throughout the County. ICLS participates in senior community fairs and disseminates information to seniors. ICLS maintains a telephone listing in the yellow pages and also maintains a website: <http://www.inlandlegal.org>

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

Fiscal Year	Name of Provider	Geographic Region Covered
2016-2017	Inland Counties Legal Services	San Bernardino County
2017-2018	Inland Counties Legal Services	San Bernardino County
2018-2019	a. b. c.	a. b. c.
2019-2020	a. b. c.	a. b. c.

12. Discuss how older adults access Legal Services in your PSA:

Older adults are interviewed concerning their legal problems at senior citizen centers throughout the County. Additionally, initial contact can be from the seniors reaching ICLS by telephone. ICLS has designated Senior Lines which are answered by a staff person in each of the three branch offices located in the County of San Bernardino.

- San Bernardino, 909.888.3889
- Rancho Cucamonga, 909.476.9252
- Victorville, 760.241.7072

These telephone lines are maintained especially for senior citizens who also have the option of using toll free lines to the office. The toll free lines reach a voice mail system and provide options for reaching advocates as well as branch offices.

Appointments are also scheduled at branch offices. ICLS has bilingual staff who speak Spanish who can interpret when needed in all three offices. In addition, senior advocates also speak Spanish.

- 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):**

Identified in number 5 above.

- 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? Discuss:**

Identified in number 5 above.

- 15. What are the barriers to accessing legal assistance in your PSA? Include proposed strategies for overcoming such barriers. Discuss:**

Barriers include a lack of public transportation in the more rural and remote parts of the County, geographic size of the County, and limited resources for legal assistance. Strategies: ICLS is accessible toll free by telephone and performs regularly scheduled outreach at senior citizen centers throughout the County.

- 16. What other organizations or groups does your legal service provider coordinate services with? Discuss:**

Department of Aging and Adult Services, Ombudsman, Adult Protective Services, California Advocates for Nursing Home Reform, Protection and Advocacy, and Legal Aid Society of San Bernardino.

Section 16. Governing Board

**GOVERNING BOARD MEMBERSHIP
2016-2020 Four-Year Area Plan Cycle**

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

Total Number of Board Members: 5

Name and Title of Officers:

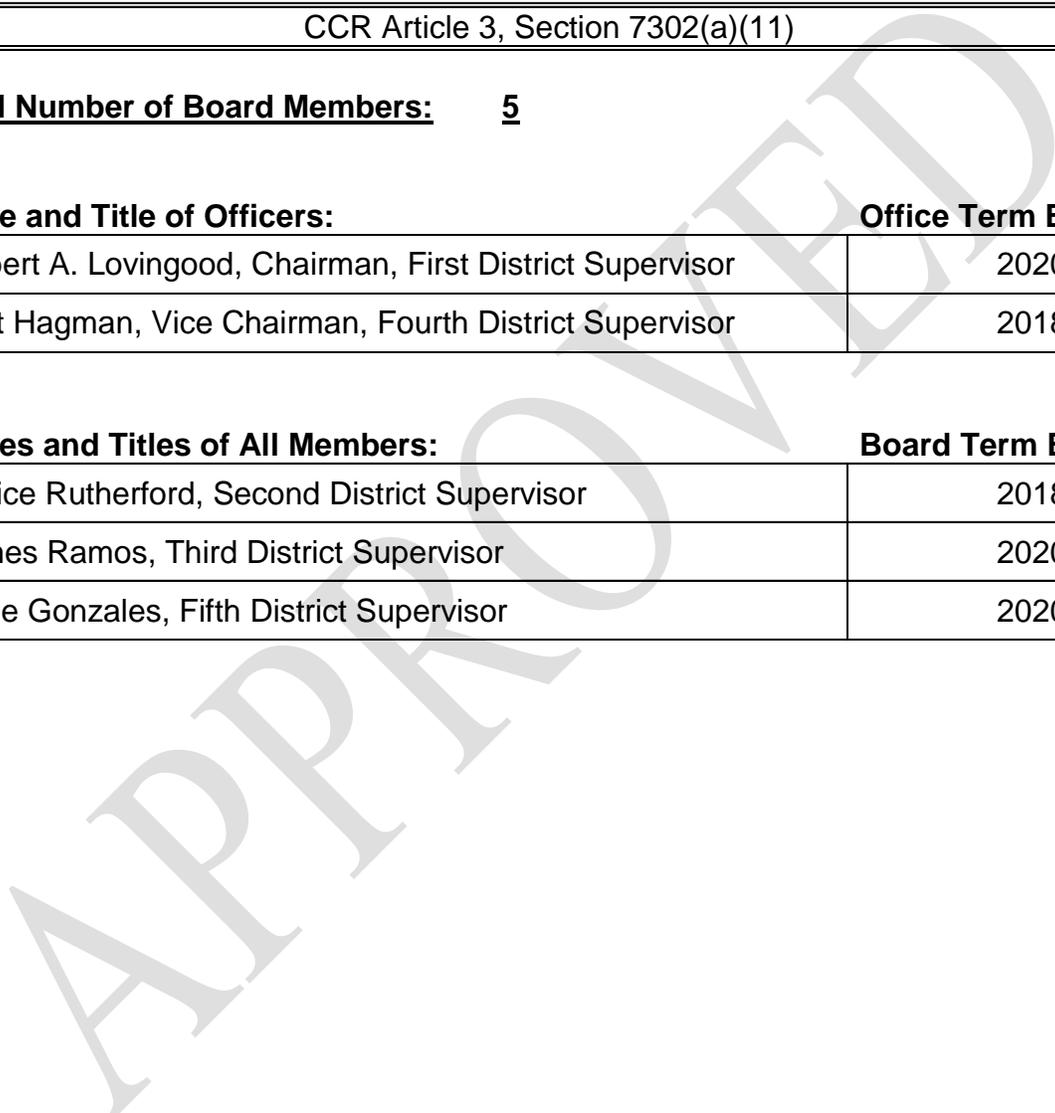
Office Term Expires:

Robert A. Lovingood, Chairman, First District Supervisor	2020
Curt Hagman, Vice Chairman, Fourth District Supervisor	2018

Names and Titles of All Members:

Board Term Expires:

Janice Rutherford, Second District Supervisor	2018
James Ramos, Third District Supervisor	2020
Josie Gonzales, Fifth District Supervisor	2020



Section 17. Advisory Council

ADVISORY COUNCIL MEMBERSHIP

OAA 2006 306(a)(6)(D)
 45 CFR, Section 1321.57
 CCR Article 3, Section 7302(a)(12)

Total Council Membership (include vacancies) 21

Number of Council Members over age 60 13

Race/Ethnic Composition	<u>% of PSA's 60+Population</u>	<u>% on Advisory Council</u>
White	<u>71.3</u>	<u>68.8</u>
Hispanic/Latino	<u>30.2</u>	<u>12.5</u>
Black	<u>7.5</u>	<u>25.0</u>
Asian/Pacific Islander	<u>8.5</u>	<u>0.0</u>
Native American/Alaskan Native	<u>0.1</u>	<u>0.0</u>
Other	<u>9.5</u>	<u>0.0</u>

Note: Total percent on Advisory Council is greater than 100% due to members of more than one Race/Ethnicity

Name and Title of Officers:

Office Term Expires:

Luella G. Hairston, Esq., Chair, California Senior Assemblymember	12/02/2019
Craig Swanson, Vice Chair and Mountain Regional Council on Aging	None- RCA
Charles Marlett, Secretary and North Desert Regional Council on Aging	None- RCA

Name and Title of Other Members:

Office Term Expires:

Terry Conaway, Colorado River Regional Council on Aging	None- RCA
Maricela S. Ferguson	12/07/2020
Frank Garza	12/05/2016
Lawrence S. Grable, Legislative Committee Chair	12/03/2018
Jane Haines, East Valley Regional Council on Aging	None- RCA
Cathy Johnson, California Senior Assemblymember	12/02/2019

Walter Johnson, Jr., West Valley Regional Council on Aging	None- RCA
Lisbeth Koenig, Nutrition Committee Chair	12/04/2017
Penny Shubnell, Health Aging Committee Chair	11/14/2015
Margie A. Simpson, Victor Valley Regional Council on Aging	None-RCA
Wayne Stout, Intergenerational Committee Chair and Morongo Basin Regional Council on Aging	None-RCA
David Wilder, Access Committee Chair	01/06/2015
Suzanne Yoakum	12/03/2018

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): N/A

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

APPOINTED MEMBERS: 12 Members are appointed by the Board of Supervisors: 2 members from each supervisorial district and 2 members appointed at-large. The term of office of the appointed members shall be coterminous with the appointing supervisor; these shall be 4-year terms, expiring the first Monday of December in the appropriate year. The term of office of the at-large members shall be coterminous with the appointing Chairman of the Board; these shall be 2-year terms, expiring at the first Board of Supervisors meeting in January of the appropriate year.

PROFESSIONAL MEMBERS: At the recommendation of the Director of the Department of Aging, the Board of Supervisors may appoint up to 2 commissioners having relevant professional experience in fields including but not limited to: gerontology, social work, education, banking or financial management. The term of office of the Professional Members shall be for four years.

REPRESENTATIVE MEMBERS: The chairs of the Regional Council on Aging (RCA) or a designated member shall serve on the commission. In the event 1 or more of the

chairs of the RCA is already a member of the Commission, he/she may continue to serve in the position of his/her choice. The RCA shall designate a representative in the event the chair elects to serve on the Commission in another position. The term of office of the representative members shall be coterminous with the term of office for the chairs of the RCA.

In no circumstances will any member occupy more than one seat on the Commission.

APPROVED

Section 20. Family Caregiver Support Program

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

2016–2020 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.

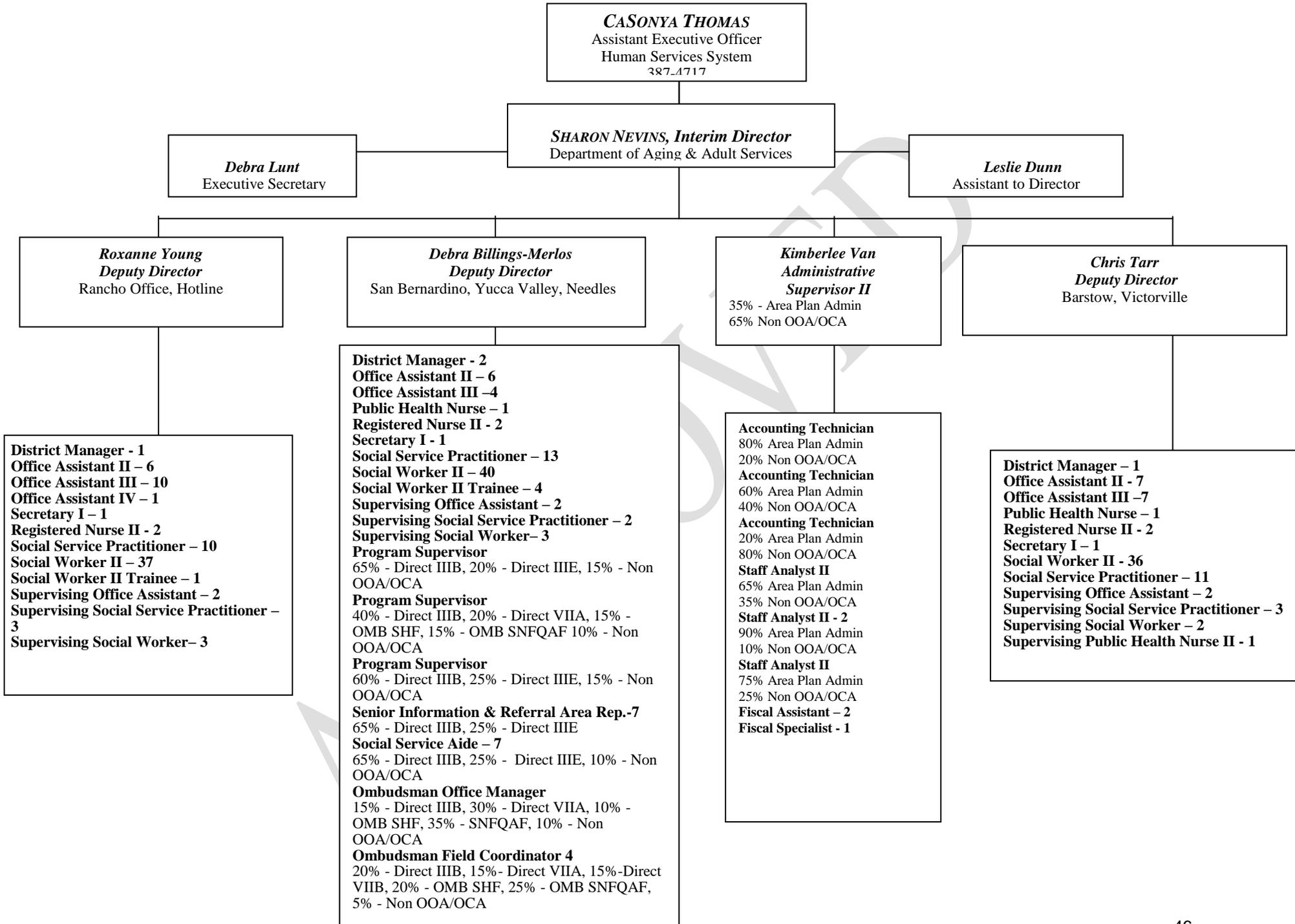
Check YES or NO for each of the services* identified below and indicate if the service will be provided directly or contracted. **If the AAA will not provide a service, a justification for each service is required in the space below.**

Family Caregiver Services

Category	2016-2017	2017-2018	2018-2019	2019-2020
Family Caregiver Information Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract
Family Caregiver Access Assistance	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract
Family Caregiver Support Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract
Family Caregiver Respite Care	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract
Family Caregiver Supplemental Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input checked="" type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Direct <input type="checkbox"/> Contract

- ***Refer to PM 11-11 for definitions for the above Title III E categories.**

SECTION 21—SAN BERNARDINO COUNTY DEPARTMENT OF AGING & ADULT SERVICES ORGANIZATIONAL CHART



Attachments

Public Hearing, Senior Affairs Committee Minutes

APPROVED

Minutes—Senior Affairs Commission March 15, 2017

Public Hearing for the 2017-2018 Area Plan Update

RECESS FOR PUBLIC HEARING

Luella G. Hairston called for a recess of the Senior Affairs Commission to call for public comments regarding the 2017-2018 Area Plan Update and turned the floor over to Paula McGrew. Ms. McGrew reviewed the document that will be submitted, explained what amendments will be made for the current update, discussed current demographic information, and invited public testimony.

PUBLIC COMMENTS

Penny Shubnell noted that Mr. Frank Garza has not yet retired from his position as a Commissioner despite his term's expiration and should be included in the Senior Advisory Council chart.

Seniors from Crestline spoke on the benefits of the Senior Nutrition Program, praising the opportunities it provides for seniors to socialize and participate in activities with their community. Additional public testimony addressed concerns regarding elder abuse, senior mental health, and advocacy for seniors in general. One member of the public noted that some food banks that offer food to low income individuals, including and especially seniors, are distributing expired or spoiled food. Sharon Nevins spoke on the importance of recognizing the struggles that seniors face and DAAS' goals to address these concerns.

RECONVENE SENIOR AFFAIRS COMMISSION MEETING

7. ITEMS FOR ACTION:

David Wilder moved to approve the 2017-2018 Area Plan Update with additional testimony and corrections. Second by Lib Koenig. All approved.