



Aging and Adult Services  
Public Guardian

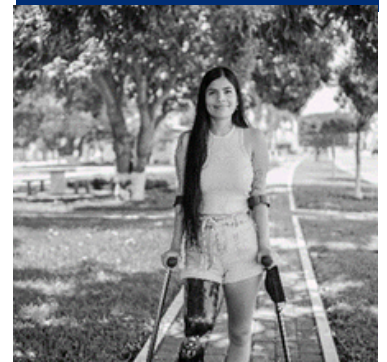
Draft

2024

2028

# SAN BERNARDINO COUNTY AREA PLAN

Department of Aging and Adult Services-Public Guardian  
Planning and Service Area 20





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# Draft

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# Required Components Checklist



# Required Components Checklist

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Section	Description	Completed
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1	Mission Statement	
2	Description of the Planning and Service Area (PSA)	
3	Description of the Area Agency on Aging (AAA)	
4	Planning Process and Establishing Priorities and Identification of Priorities	
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7	Area Plan Narrative Goals and Objectives	
7	Title IIIB Funded Program Development (PD) Objectives	
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8	Service Unit Plan (SUP) and Long-Term Care Ombudsman Outcomes	
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# Transmittal Letter



# Transmittal Letter

Draft

## 2024-2028 Four Year Area Plan/Annual Update

Check one:  FY 24-25  FY 25-26  FY 26-27  FY 27-28

### AAA Name: San Bernardino County Department of Aging and Adult Services - Public Guardian

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 on Aging 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.

Signer	Position	Signature	Date
Dawn Rowe	Governing Board		
David Wilder	Advisory Council Chair		
Sharon Nevins	Area Agency Director		







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# Mission Statements



# Mission Statements

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## State of California Core Mission Statement

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

## Department of Aging and Adult Services - Public Guardian Mission Statement

Providing service to older adults and at-risk individuals to improve or maintain choice, independence, and quality of life. The Department works to ensure older adults and individuals with disabilities have the right to age in place, in the least restrictive environment.



# Mission Statements

Draft



## Countywide Vision

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

- We envision a complete County that capitalizes on the diversity of its people, its geography, and its economy to create a broad range of choices for its residents in how they live, work, and play.
- We envision a vibrant economy with a skilled workforce that attracts employers who seize the opportunities presented by the County's unique advantages and provide the jobs that create countywide prosperity.
- We envision a sustainable system of high-quality education, community health, public safety, housing, retail, recreation, arts and culture, and infrastructure, in which development complements our natural resources and environment.
- We envision a model community which is governed in an open and ethical manner, where great ideas are replicated and brought to scale, and all sectors work collaboratively to reach shared goals.

From our valleys, across our mountains, and into our deserts, we envision a County that is a destination for visitors and a home for anyone seeking a sense of community and the best life has to offer.



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# Planning Service Area 20 (PSA 20)

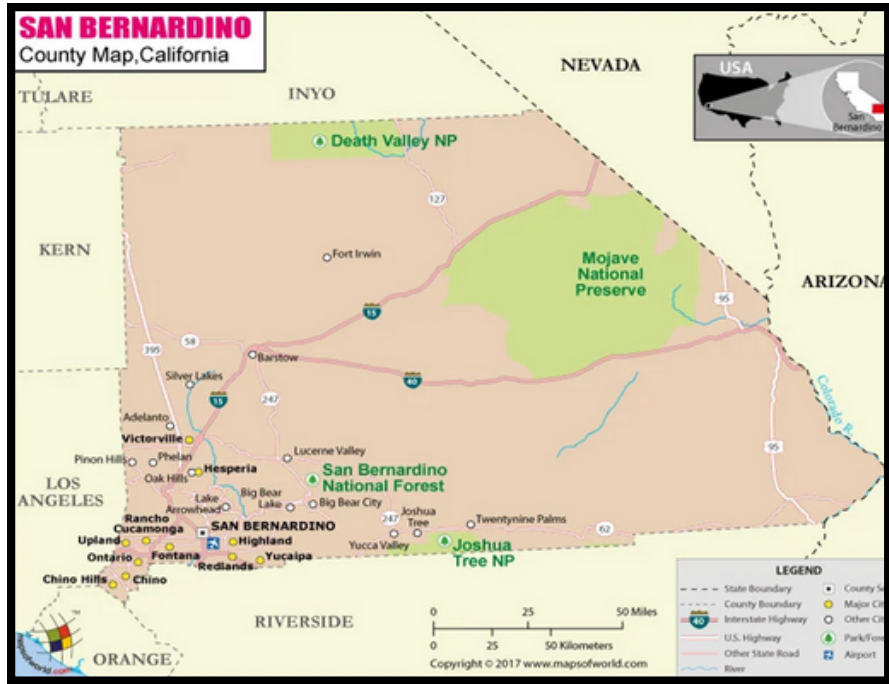


# Planning and Service Area 20 (PSA 20)

Draft

## Purpose

This section will provide a description of the unique, physical characteristics of PSA 20, including a breakdown of demographics found in this area. For the purpose of clarity, the San Bernardino County may be referred to as “County”, PSA 20, the Area of Agency on Aging (AAA), or Department of Aging and Adult Services – Public Guardian (DAAS – PG).



Source: San Bernardino County Map, Map of San Bernardino County, California (mapsofworld.com)

## Geography

San Bernardino County covers 20,105 square miles and is the largest County in the United States by land mass. The County comprises 12% of California’s land area. To place into perspective, the states of Massachusetts, Delaware, Rhode Island, and New Jersey, *combined* fit within the boundaries of the County. The AAA is a microcosm of the entire state with urban, suburban, and rural areas. The County stretches on the west border from Pomona in Los Angeles County eastward to the Colorado River, sharing state lines with Arizona and Nevada. Surrounding counties include Inyo County to the north; Kern and Los Angeles counties to the west; and Orange and Riverside counties to the south. Over 90% of the County is Mojave Desert. The majority of this landscape is desert, with a small portion of the Colorado Desert represented at the southeastern end of the County. Almost three-quarters of the County is open and undeveloped, with 80% of the land owned by federal agencies, which is outside of the governing control of the County or local jurisdictions. The remainder of the County consists of the San Bernardino Valley, and a series of Transverse Mountain Ranges that bisect the County in an east-west divide which include the San Gabriel Mountains, San Bernardino Mountains, and the Little San Bernardino Mountains.



# Planning and Service Area 20 (PSA 20)

Draft

## Population

With a population of 2,225,586, San Bernardino County is the fourteenth most populous County in the United States and the fifth most populous in California, according to the U.S. Census Bureau. There are twenty-four incorporated cities and towns in the County. The majority of the County population resides in cities, with 311,659 persons or approximately 14% of residents in unincorporated areas. The largest cities in the County are listed below. The top four cities are in the valley area of the County which is generally the southwest portion of the County with 75% of the County’s population concentrated in the valley area. Fontana, Rancho Cucamonga, and Ontario are contiguous cities to each other, and their combined population would make the area the fifth most populous city in California (behind San Francisco and ahead of Fresno). Victorville is the largest city outside of the valley and is located in the High Desert.

## Demographic Characteristics

The demographic information on the right comes from a variety of sources including the United States Census Bureau and the State of California, Department of Finance. Detailed information on the Elder Economic Security Index is provided by University of California, Los Angeles, Center for Health Policy Research.

The next table represents the California Department of Aging (CDA) Population Demographic Projections for San Bernardino County. The latest available data from CDA was prepared in 2023 as part of the Intrastate Funding Formula (IFF).

Year	State Pop. of Adults Age 60+	County Pop. of Adults Age 60+	County Pct. of Adults in State Age 60+
2020	8,822,132	403,844	4.57%
2021	8,620,949	392,687	4.55%
2022	9,259,582	423,290	4.57%
2023	9,146,021	417,606	4.56%
2024	Not applicable at this time		

City	Pop.	Rank	State Rank
San Bernardino	223,230	1	19
Fontana	213,851	2	21
Ontario	180,717	3	25
Rancho Cucamonga	173,545	4	28
Victorville	137,193	5	44

# Planning and Service Area 20 (PSA 20)

Draft

## Demographic Characteristics Cont

From 2016 to 2019, the 60+ population for the IFF for the County has increased by 15.8%. Based on the projections of the United States Census Bureau, as of July 1, 2022, 12.5 % of the population in San Bernardino County consisted of adults 65 and older. This increase in population does not include the growth in the 60 to 64 age group.

Year	Demographic	Population 60+	Non-Minority 60+	Minority 60+	Low Income 60+	Medi-Cal Eligible 60+
2020	Number of Persons	403,844	198,964	204,880	52,450	88,649
	% County Population		49.26%	50.73%	12.98%	21.95%
2021	Number of Persons	392,687	179,727	212,960	53,695	91,210
	% County Population		45.76%	54.23%	13.67%	23.22%
2022	Number of Persons	423,290	130,051	293,239	55,435	100,149
	% County Population		30.72%	69.27%	13.09%	23.65%
2023	Number of Persons	417,606	184,327	233,279	56,055	108,193
	% County Population		44.13%	55.86%	13.42%	25.90%
2024	<b>Not Available Yet</b>					

Year	Demographic	Geo. Isolation 60+	SSI/SSP 65+	Population 75+	Lives Alone 60+	Non-English Speaking 60+
2020	Number of Persons	21,182	25,395	107,928	58,260	18,790
	% County Population	5.24%	6.28%	26.72%	14.42%	4.65%
2021	Number of Persons	21,182	25,872	102,262	58,555	18,125
	% County Population	5.39%	6.57%	26.04%	14.91%	4.61%
2022	Number of Persons	21,182	25,800	116,943	59,620	17,535
	% County Population	5.00%	6.09%	27.62%	14.08%	4.14%
2023	Number of Persons	21,182	25,387	115,407	61,215	16,925
	% County Population	5.25%	6.29%	26.73%	14.65%	4.05%
2024	<b>Not Available Yet</b>					

# Planning and Service Area 20 (PSA 20)

Draft

## Resources and Constraints

The AAA, as the Department of Aging and Adult Services - Public Guardian (DAAS - PG), is a Department within the Human Services group for San Bernardino County. Information gathering, coordination of services, and consolidation of resources for the Human Services division, are facilitated through DAAS – PG. One example is the development of a comprehensive and coordinated Disaster Plan that addresses the interaction of all County departments. Another example is the use of geographic information systems-based software maintained by Human Services Administration to contact DAAS - PG clients during emergency situations.

DAAS - PG has also developed a new system to allow for year-round collection of data regarding the needs of older adults, adults with disabilities and their caregivers, that reside within PSA 20. This stems from the collaboration between the CDA and Polco, which is an organization dedicated to creating surveys to gauge local and national community needs. The research provided by Polco created the opportunity for DAAS - PG to continue the expansion of efforts to monitor both the need and growth of the County's growing population of older adults.

The geographical size, diversity of population, and varying landscapes, produce exceptional issues regarding the logistics of delivering services provided by the County. Over three-quarters of the population live in the southwestern valley portion of the County. This part of the County is urban and/or suburban with services available from an array of sources. The remainder of the population lives in small, often isolated communities throughout vast stretches of desert and mountains.





# Planning and Service Area 20 (PSA 20)

Draft

## Resources and Constraints, Continued

Weather in these areas can vacillate between freezing temperatures in the winter months, to temperatures exceeding 120 degrees in desert areas. This presents critical challenges for planning services, especially in consideration of older constituents who may be on a fixed income, living with disabilities, or are in need of a caregiver. This includes two areas where proximity to shopping, healthcare, and business services are in an adjacent county or state. Trona, for example, located in the northwest corner of the County, is approximately 20 miles from the city of Ridgecrest in Kern County; whereas Barstow which is part of the County, is approximately 90+ miles away or a 2 hours' drive from Trona. Similarly, the communities along the Colorado River such as Needles, and Big River are closer to Arizona and Nevada than to cities within the County, (e.g., Needles to Barstow is 149 miles versus Needles to Bullhead City, AZ is approximately 21 miles.)

### Service System

The AAA provides direct delivery of Senior Information and Assistance (SIA) and the Title V Senior Community Service Employment Program (SCSEP). Both programs operate throughout the County to best serve the older population.

DAAS – PG coordinates with San Bernardino County’s Human Services Contracts division for procurements and contracts. CDA policy limits contracts to a maximum of 1 year with a potential to provide 3 one-year extensions. To accommodate the workload a new Staff Analyst with a specialty in contracts will oversee all contract timelines and obtain support from Staff Analysts overseeing the Programs to submit all contracts during an establish contract Season (December – February) each calendar year.

Title IIID Disease Prevention and Health Promotion is provided by the County’s Department of Public Health via a Memorandum of Understanding.

Program	Service
IIIB	Senior Supportive Services
IIIC	Senior Nutrition
IIID	Disease Prevention and Health Promotion
IIIE	Family Caregiver Supportive Services
HICAP	Health Insurance Counseling & Advocacy Program
Ombudsman	Long Term Care Ombudsman
OAA	Supportive Services, Nutrition

# Planning and Service Area 20 (PSA 20)

Draft

## Service System, Continued

The County provides services in the following service areas:

Regional Service Area (RSA)	Communities
East Desert	Essex, Kelso, Nipton, Needles, Havasu Lake, Big River, and surrounding areas
North-Western Desert	Barstow, Newberry Springs, Trona, Red Mountain, Baker, and surrounding areas
Morongo Basin	Amboy, Johnson Valley, Joshua Tree, Landers, Morongo Valley, Wonder Valley, Yucca Valley, Twentynine Palms, and surrounding areas
Victor Valley	Adelanto, Apple Valley, Hesperia, Lucerne Valley, Phelan, Victorville, Wrightwood, and surrounding areas
San Bernardino Mountains	Crestline, Running Springs, Lake Arrowhead, Big Bear, Twin Peaks, and surrounding areas
East Valley	Rialto, Bloomington, Fontana, Colton, Redlands, Yucaipa, San Bernardino City, Loma Linda, Lytle Creek, Highland, and surrounding areas
West Valley	Chino, Chino Hills, Montclair, Ontario, Rancho Cucamonga, Upland, and surrounding areas



# Planning and Service Area 20 (PSA 20)

Draft

## Service System, Continued

Specific programs by funding are listed below.

Title IIIB		
Program	Location	Number of Providers
Legal Services	All Regnal Service Areas	1
Adult Day Care	East and West Valleys, Victor Valley	1
Assisted Transportation	Morongo Basin, East and West Valleys, Victor Valley	4
Chore	Morongo Basin, East and West Valleys, Victor Valley, North-Western Desert, San Bernardino Mountains	3
Homemaker	Morongo Basin, East and West Valleys, Victor Valley, North-Western Desert, San Bernardino Mountains	3
Personal Care	East and West Valleys, Victor Valley, North-Western Desert, San Bernardino Mountains	1
Residential Repairs / Modifications	East Desert, East and West Valleys, Victor Valley, North-Western Desert, San Bernardino Mountains	3
Senior Center Activities	East Desert, Morongo Basin, Victor Valley, North-Western Desert	7



# Planning and Service Area 20 (PSA 20)

Draft

## Service System, Continued

Specific programs by funding are listed below.

Title III C		
Provider	Location	Number of Service Sites
Barstow Senior Citizens Center	North-Western Desert, Victor Valley	4 sites and home-delivered meals
Big Bear Valley Recreation and Park District	San Bernardino Mountains	1 site
Bonnie Baker Senior Citizens Club	East Desert	2 sites and home-delivered meals
City of Montclair	West Valley	1 site
City of San Bernardino	East Valley	
Crest Forest Senior Citizens' Club	San Bernardino Mountains	1 site
Family Service Association	East and West Valleys, Morongo Basin	18 sites and home-delivered meals
Lucerne Valley Senior Citizens' Club	Victor Valley	1 site



# Planning and Service Area 20 (PSA 20)

Draft

## Service System, Continued

Specific programs by funding are listed below.

Title III E		
Program	Location	Number of Providers
Caregiver Information and Assistance	<b>East and West Valleys, Victor Valley, North-Western Desert, San Bernardino Mountains, Morongo Basin</b>	1
Caregiver Information Services		1
Caregiver Respite Out-Of-Home Overnight Care		1
Caregiver Supplemental Service Caregiver Registry		1
Caregiver Supplemental Service Caregiver Home Modifications		1
Caregiver Supplemental Service Caregiver Legal Consultations		1
Caregiver Support Groups		2
Caregiver Training		2
Caregiver Supplemental Service Caregiver Assistive Technology		2
Caregiver Supplemental Service Caregiver Assessment		2
Caregiver Respite In-Home		2
Caregiver Respite Other		2
Caregiver Respite Out-Of-Home Day Care		2
Caregiver Case Management		2
Caregiver Counseling		2



# Planning and Service Area 20 (PSA 20)

Draft

## Service System, Continued

Specific programs by funding are listed below.

HICAP		
Program	Location	Number of Providers
Health Insurance Counseling and Advocacy Program	All RSAs	1
Medicaid, Medicare Improvements for Patients and Providers		1

## Additional Service Delivery Systems

### 211

The County’s 2-1-1 information system provides detailed information via an ‘Older Adults’ link that can be accessed online by older adults. 2-1-1 also has the capacity to directly enroll older adults in Cal Fresh (the Federal Supplemental Nutrition Assistance Program).

### Senior Information Assistance (SIA) Partnerships

The SIA staff partner with other government entities, non-profits, and for-profit organizations to provide services to older adults throughout the County. For example, SIA is often contacted to provide utility assistance to make sure an older adult has electricity or water if they fall behind on their bills. By partnering with the non-profit Senior Disabled Fund, they are able to assist in limited bill paying to make sure that the older adult remains in a safe and healthy living environment. Another example is the San Bernardino County Age Wise program which provides in-home behavioral health and wellness services by means of a nontraditional, comprehensive full service partnership model. The Age Wise interdisciplinary team served those 59 and older throughout the entire County through a “no wrong door” approach to accessing services which includes behavioral health treatment in the form of counseling services, a wraparound case management approach to assist with connecting to resources to help meet basic needs, and peer and family advocacy and support. Lastly, SIA partners with the Adult Protective Services “At-Home” Homelessness Prevention Program. The At-Home program of San Bernardino County is a temporary housing assistance program for at-risk or currently homeless older or dependent adults involved with Adult Protective Services (APS). The goal of At-Home is to address homelessness in some of the most vulnerable populations through the assistance of Adult Protective Services Practitioners trained to work with those most at-risk and in need of housing services.



# Description of the Area Agency on Aging (AAA)



# Description of the Area Agency on Aging (AAA)

Draft

## Purpose

This section describes how the AAA, on behalf of all older individuals, adults with disabilities, and their caregivers in PSA 20, carries out its role as leader on aging issues.

## Leadership, Development of Support Systems and Programs

San Bernardino County's Department of Aging and Adult Services - Public Guardian (DAAS - PG) is a unit of local county government and operates as a Department of San Bernardino County's Human Services division. The Director of DAAS - PG serves as the designated AAA Director and as the Public Guardian of the County. DAAS - PG provides services to older individuals, ages 60 and over, caregivers, individuals with disabilities, and adults aged 18 and over in need of protection. The Department works to ensure options are easily accessible to all older individuals and to have a visible resource where they can go or call for information. DAAS - PG is also actively involved with community resources to strengthen the service delivery system. The AAA continues to spearhead efforts to expand community education, discuss and share best practices, and consider evidence based programs.

Pursuant to Welfare and Institutions Code section 5354.5 and Probate Code section 2920, the Office of the Public Guardian is appointed by the California Superior Court to be the conservator for individuals who are gravely disabled due to a mental disorder and incompetent older or dependent adults. The goal is to ensure the safety, both financially and physically, of an incompetent and mentally disabled person who meet the criteria for conservatorship. This is accomplished through the process of appointing a legally responsible person (conservator) to manage these individuals' personal affairs, coordination of custodial services and management of their estate.

DAAS - PG responsibilities also include Adult Protective Services (APS), In-Home Support Services (IHSS), the Multipurpose Senior Services Program (MSSP), Older Americans Act (OAA) Programs, and the Office of the Public Guardian. The annual budget for the AAA in the previous Area Plan was 12.6 million dollars; however, the budget for the 2024 - 2028 Area Plan is to be determined in the coming months and will be added as an update once it is received by the California Department of Aging. Federal, State and County dollars will be included in the updated budget. Aging programs are provided by DAAS - PG staff (direct) and in conjunction with community-based organizations via County contracts.



# Description of the Area Agency on Aging (AAA)

Draft

## DAAS-PG Direct Service Programs

- Senior Information and Assistance (SIA) (Title IIIB and IIIE)
- Senior Community Service Employment Program (Title V)

## Title IIIB - Supportive Services

Legal Assistance, Personal Care, Homemaker, Chore, Adult Day Care, Assisted Transportation, Residential Repair/Modification, and Senior Center Activities are the services funded by IIIB. Ten contracted providers and DAAS-PG staff provide these services in varying regions of the County. Although each service is encouraged in each region, not every region has vendors who are available to provide services.

## Title IIIC - Older Californians Nutrition Program

The AAA contracts with eight providers to provide congregate and home-delivered meals throughout the County. There are currently thirty-four (35) congregate meal sites in San Bernardino County. In Fiscal year (FY) 2022/23 7,526 individuals were served 102,441 balanced meals at the congregate sites and 5,606 individuals received 703,763 balanced, home-delivered meals.

## Title IIID – Disease Prevention and Health Promotion Program

DAAS - PG contracts with the Department of Public Health to conduct the following classes at various sites throughout the County: Bingocize, Walk with Ease, Tai Chi, and Fall Prevention.

## Title IIIE – Family Caregiver Support Program

The AAA contracts with two (2) providers to provide family caregiver services to all parts of the County except the northwest desert area.

## Health Insurance Counseling and Advocacy Program (HICAP)

One vendor provides HICAP services throughout the County. HICAP is funded by the state HICAP funds, Federal Centers for Medicare and Medicaid, Medicare Improvements for Patients and Providers Act (MIPPA), and Federal Financial Alignment grants.

## Title VII and VIIA – Long Term Care Ombudsman, and Prevention of Elder Abuse, Neglect, and Exploitation

One Vendor provides Title VII and VIIA services throughout the County.

# Description of the Area Agency on Aging (AAA)

Draft

## Senior Affairs Commission

The Senior Affairs Commission (SAC), established by the County's Board of Supervisors on July 2, 1973, consists of people who are residents of the County. The Commission membership consists of 21 members. Membership on the SAC is composed of three categories of members: Appointed, Representative and Professional. Currently there are six (6) standing SAC committees: Access, Healthy Aging, Intergenerational, Executive, Legislative, and Nutrition. Each committee established the following goals and objectives during the 2023/2024 fiscal year. These goals will continue throughout 2024 – 2028 fiscal years.

### Access Committee - Continued

**Goal:** To assist commissioners in their education and awareness of safety situations arising for the older adults and persons with disabilities to be able to better serve and advocate for this population.

**Objectives:**

- Plan a minimum of three relevant speakers or website presentations during the 2023/24 fiscal year Access committee meetings.
- Research, conduct, and document through the eyes of the older adults and disabled a field trip using public transportation to a local medical facility.

### Legislative Committee

**Goal:** To establish, review, and support legislative priorities that affect older adults and disabled individuals each fiscal year.

**Objectives:**

- Actively pursue a minimum of three findings of the California Senior Legislature and demonstrate support when asked to back bills affecting older adults and disabled individuals by the end of the fiscal year.
- Engage the Program Development Division (PDD) in selecting and reviewing a minimum of three legislative bills monthly. Act whenever possible in support of those bills that affect older adults and disabled individuals by the end of the fiscal year.



# Description of the Area Agency on Aging (AAA)

Draft

## Healthy Aging Committee

**Goal:** To disseminate health-related information regarding current news from the Inland Caregiver Resource Center (ICRC), Inland Empire Health Plan (IEHP) and Molina Healthcare Centers, and regularly publish documentation regarding items of interest to older adults and disabled individuals each calendar year.

### **Objectives:**

- Complete the technical review of the “Fear of Technology Handbook” for the older adults and disabled individuals having difficulty with computers and such technology by the end of fiscal year.
- Publish ten (10) “Did You Knows” to a target audience of at least 500 constituents of the SAC Commissioners represented area each fiscal year.
- Engage at least one (1) new Health Care Provider at the Healthy Aging Committee meetings ensuring their reports are documented and distributed within the minutes of each meeting. An Inland Empire Health Plan (IEHP) representative and DAAS - PG Public Health Nurse attend committee meetings regularly.

## Intergenerational Committee

**Goal:** To establish and maintain a relationship with the current three County Kinship organizations and Inland Caregivers Resource Centers (ICRC). Continue to promote outreach publications through their programs, education, and service offerings for older adults, disabled individuals, and children.

### **Objectives:**

- Commissioners will attend one Kinship or ICRC meeting or program per quarter either in person or virtually and report the activity to the Committee.
- Commissioners will promote and support Kinship and ICRC programs and services by disseminating monthly calendars to schools, churches, and other interested organizations within the district being represented.



# Description of the Area Agency on Aging (AAA)

Draft

## Nutrition Committee

**Goal:** To assist the DAAS - PG Nutrition Analyst in ensuring that the nutrition sites are following the rules and guidelines within the contract, primarily found in the Scope of Work, and disseminate pertinent information on nutrition and healthy eating habits.

**Objectives:**

- Review the current nutrition site checklist that is used to evaluate the nutrition sites, making changes if needed. Train Commissioners proper procedures in performing nutrition site evaluation each fiscal year.
- SAC Commissioners will visit ten nutrition sites to review the activities and safety at each site, documenting each visit following the Nutrition Sites Checklist. Completed reports will be sent to the Nutrition Analyst during the 2023/24 fiscal year.

## Executive Committee

**Goal:** To assist Commissioners in their education and awareness of the roles and responsibilities of the SAC, its legal documentation and the specific roles and responsibilities of DAAS - PG to better assist in the advocacy of older adults and disabled programs.

**Objectives:**

- Follow-up to ensure that Bylaws are submitted to the Board of Supervisors for approval.
- Collaborate with DAAS - PG in facilitating an orientation and training for new commissioners within two months after appointment.
- Engage and assist the five SAC Committees Chairs and Commissioners in creating their Goals and Objectives by the end of the first quarter in 2023.

## Regional Councils on Aging (RCA)

Regional Councils on Aging (RCA) were established in 1978 as an extension of the AAA for gathering the concerns of older adults in their local communities. There are seven RCAs in PSA 20. The seven RCAs are: East Valley, West Valley, Victor Valley, Morongo Basin, Colorado River, North Desert, and Mountain. The boundaries of each region were established along geographic, economic, and political subdivisions borrowing heavily upon the service boundaries established by the County Department of Public Social Services and the Regional Statistics Areas established by the U.S. Bureau of the Census. Within each area, older adults elect members to their local RCA. One member of each RCA serves on the SAC with the purpose of bringing forward information specific to each regions concerns.



Aging and Adult Services  
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# Draft

# Planning Process and Establishing Priorities



# Planning Process and Establishing Priorities

Draft

## Purpose

This section provides an overview of how the AAA conducts the planning process, establishes priorities, the factors influencing the AAA's priorities, the AAA's plans for managing varied resources, and provides opportunities for public involvement in the planning process.

## Planning Process and Resource Management

The Department of Aging and Adult Services - Public Guardian, as a county department in the larger Human Services division, is positioned to receive information from a variety of sources to address the needs and unmet needs of the County's older adults, disabled populations, and conserved adults. All meetings of the Senior Affairs Commission (SAC) and the SAC Committees are open to the public and comply with Brown Act regulations. Community input is welcomed and encouraged and provides valuable input to SAC and DASS - PG. The Regional Councils on Aging also provide a forum for public input.

## Procurement of Services

The procurement process invokes a series of planning efforts. DAAS - PG procurements for OAA services are on one-year cycles to comply with State policies and procedures. Due to the time involved in processing a procurement, a new Staff Analyst with a specialty in contracts will oversee all contract timelines and obtain support from Staff Analysts overseeing the Programs to submit all contracts during an establish contract Season (December – February). Each procurement service delivery will be evaluated to ensure the needs of the senior community are met, and those with unmet needs are identified and offered appropriate support. Ultimately, the delivery of services is contingent not only upon the availability of funding but also upon the presence of suitable providers willing and able to execute the contracts.



# Planning Process and Establishing Priorities

Draft

## Senior Information and Assistance

For the development of the 2024-2028 Area Plan, five public meetings, and one public hearing were held throughout the County. Notice of the public meetings were distributed to members of the Senior Affairs Commission during their meetings and were emailed to the Regional Council on Aging Chairs. It was distributed by (SIA) staff at senior centers. Notice of the public hearing was mailed to providers, other interested parties, and city government offices located within the County. In addition, SIA staff posted the flyer in senior centers as well as distributing them at senior centers. As required by regulation, DAAS - PG advertised the notice of public hearing 30 days in advance of the date in the San Bernardino Sun newspaper.

## Public Meetings and Public Hearings

The presence of SIA staff in the community provides another conduit for valuable information about concerns and issues to be directed to AAA administration. In the last fiscal year, the twelve SIA staff made over 500 presentations and/or outreach visits to senior centers, senior housing, health and resource fairs, workshops, and special events. The steady presence of SIA staff in the community cultivates a level of trust that enhances service delivery to the senior population

## Needs Assessments

California Department of Aging (CDA) was able to put together a Community Assessment Survey for Older Adults (CASOA). The CASOA is a chance for community members to directly shape the future of services provided to their communities. DAAS - PG also created a survey which expanded on the efforts of the CDA to continue to collect information year-round. This will allow DAAS - PG to track changes and needs for the current Area Plan, while providing information that will be shared in Area Plan updates.

For the development of this four-year plan, the CASOA results provided by Polco were used. (See Section 5. Needs Assessment and Targeting).



# Planning Process and Establishing Priorities

Draft

## Priorities

The Department of Aging and Adult Services - Public Guardian (DAAS - PG) is committed to serving the older adults in our community. DAAS - PG continues to seek out partnerships and collaborative efforts to leverage our funding and identify new sources of support. A continual evaluation process is used to strengthen our organizational capacity to meet changing needs and to improve the type and quality of the services being provided.

An ongoing issue is the communication of available services to older adults in the County. DAAS - PG will expand upon a collaborative effort with our providers and community resources and focus on new outreach efforts. Senior Information and Assistance (SIA), staff will continue to visit senior centers throughout the county and distribute information and services available to older individuals and other targeted populations.

DAAS – PG also seeks to expand partnerships that can aid in the development of services to address the following needs:

- Accessing information via current technology (Internet)
- Maintaining a home (yard work & home repairs)
- Accessing information of available services for caregivers
- Working with agencies that provide help/service for caregivers
- Addressing and providing solutions to chronic homelessness within the County
- Addressing and providing access to behavioral and mental health wellness services





# Planning Process and Establishing Priorities

Draft

## Senior Information and Assistance (SIA)

The AAA works to ensure compliance with all Older Americans Act mandates. A thorough discussion of targeting is outlined in Section 6 of the Area Plan.

## Adequate Proportion

Adequate Proportion involves the AAA determining a minimum percentage of Title IIIB funds that will be spent on three categories of priority services: Access, In-Home Assistance and Legal Assistance. A variety of factors are involved in establishing Adequate Proportion. These include:

- Analysis and findings of the needs assessment.
- Input received from the public at the advertised public meetings and public hearings held throughout the county.
- The availability of the service. This includes not only consideration of how many non-OAA resources exist to meet the need but also vendor responses to providing the service.
- The cost and benefit of the service, including how many people are served and the cost per person.
- Historical trends of need for the service, use of the service, and effectiveness of the service.

Based on these considerations, the minimum percentages are:



<b>Access Services</b>	<b>40%</b>
<b>In-Home Services</b>	<b>5%</b>
<b>Legal Assistance</b>	<b>10%</b>



Aging and Adult Services  
Public Guardian

# Draft

# Needs Assessment and Targeting



# Needs Assessment and Targeting

Draft

## Purpose

This section describes the processes and methods employed by the AAA to assess the needs of San Bernardino County's older adults, adults with disabilities, and their caregivers. Detailed information regarding the assessment of these results, as well as how these results are prioritized and utilized, will be discussed.

A Community Assessment Survey for Older Adults (CASOA) was created by the California Department of Aging with the results provided by Polco. Data was collected during the months of May 2023 through September 2023. The study sample consisted of 1026 participants that currently reside in San Bernardino County. The following tables represent data collected from responses provided through CASOA and Polco. DAAS - PG has also created a needs survey which will expand the information collected by the CDA and CASOA. This will enable the Department to obtain yearlong data that reflects trends and current or expanded needs for older adults served by San Bernardino County.

DAAS-PG participants were and will be recruited from places but not limited to: senior citizen centers, senior citizen complexes, community centers, grocery markets, congregate meal sites and throughout San Bernardino County with no cutoff date. This data will be collected starting January 2024 and thereafter with updates provided to the Area Plan each year

## Demographics

Gender	Percentage
Female	33
Male	26
Declined/Not Stated	40
Identified in another way	0.64

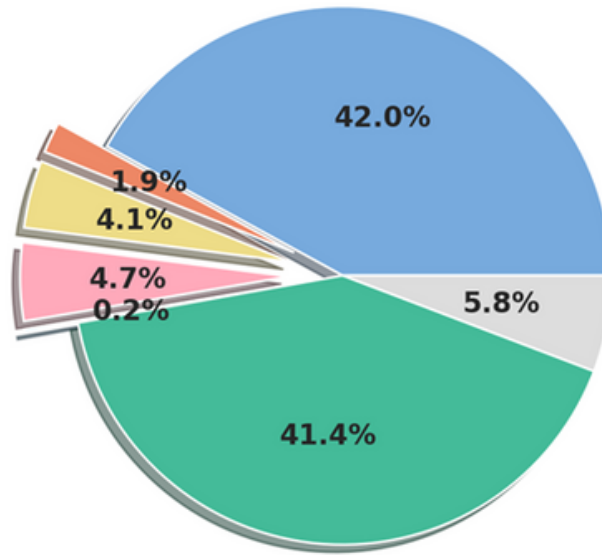
Age	Percentage
55 - 59	10
60 - 64	14
65 - 69	25
70 - 74	24
75 - 79	16
80 - 84	5
85 - 89	3
90 - 94	2
95 +	1

# Needs Assessment and Targeting

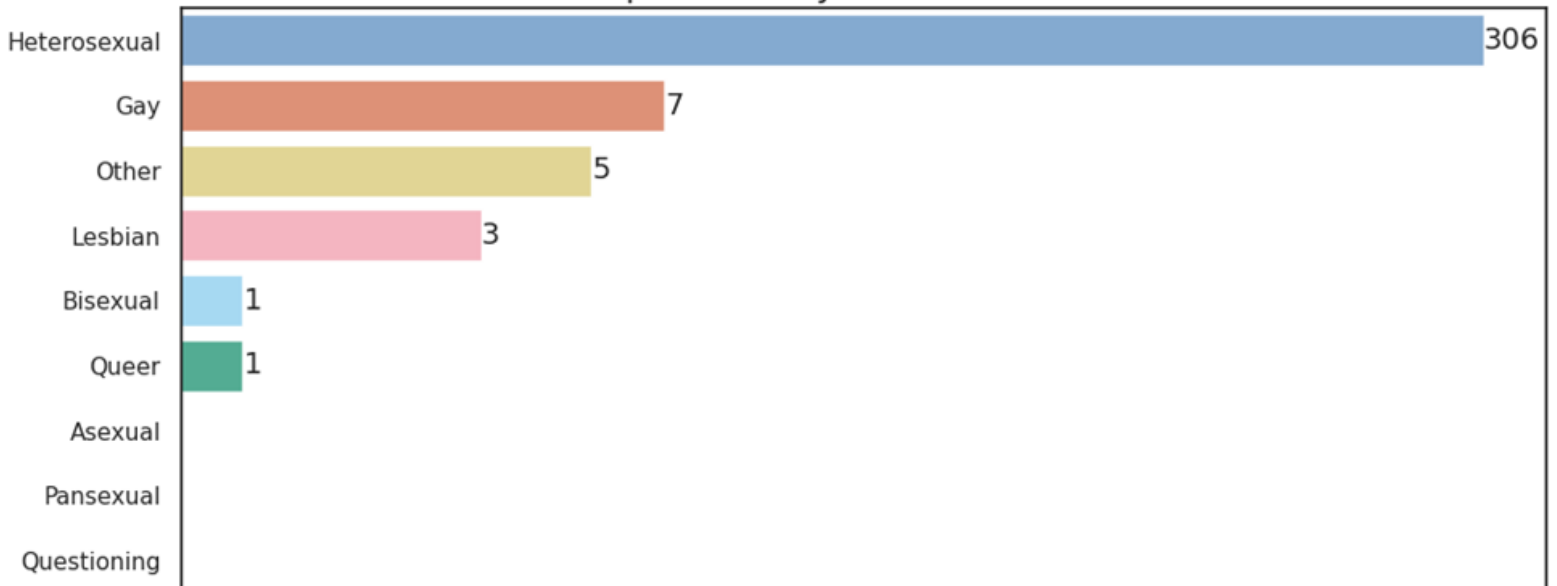
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## Demographics Continued

Respondents by Race



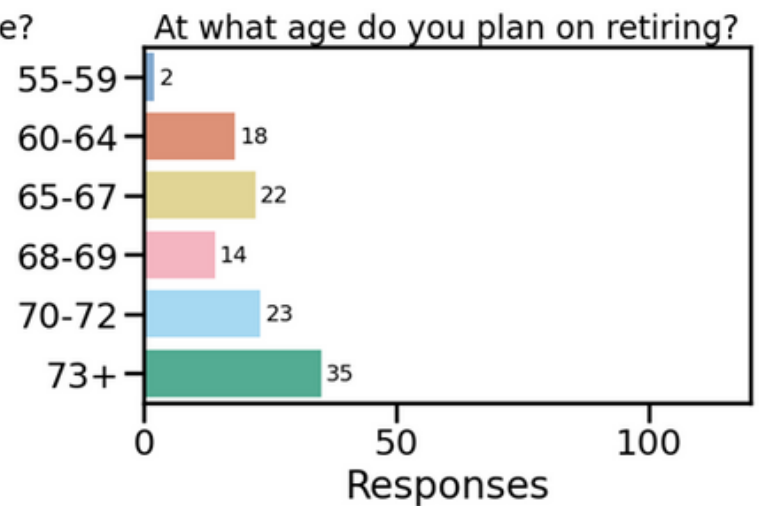
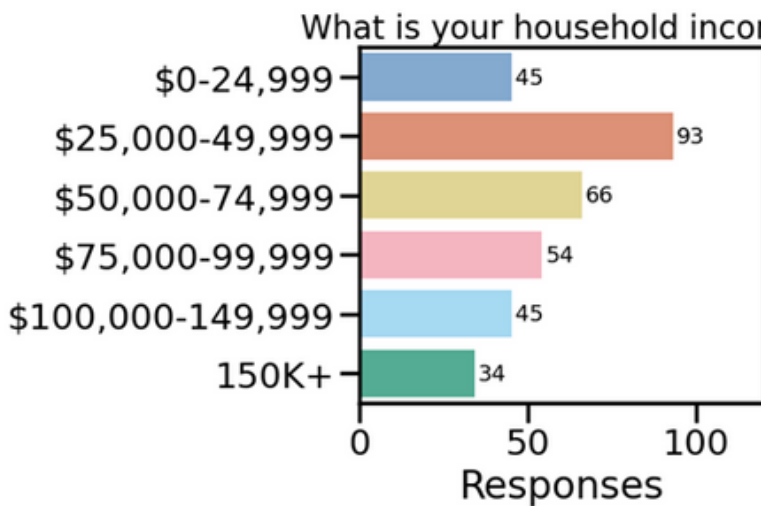
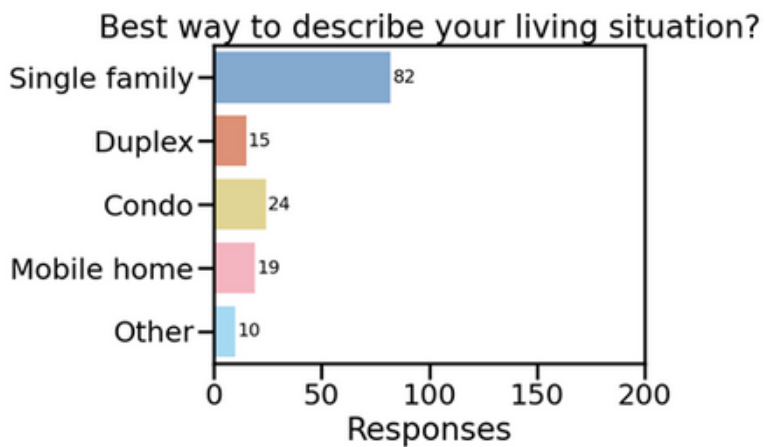
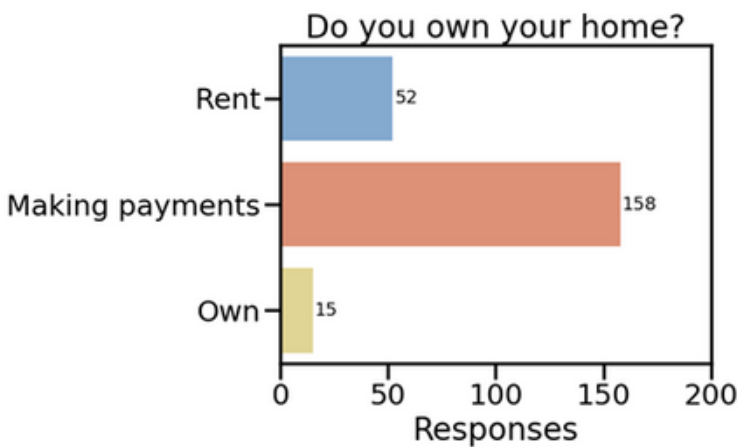
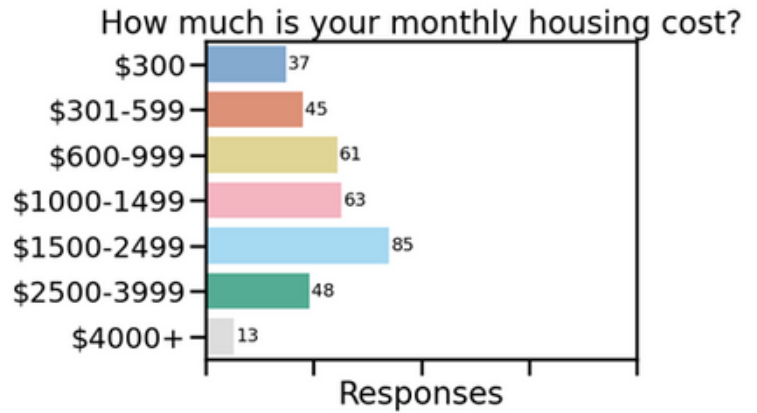
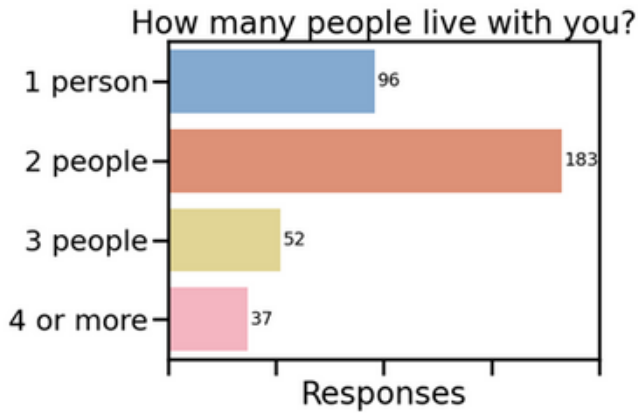
Respondents by Sexual Orientation



# Needs Assessment and Targeting

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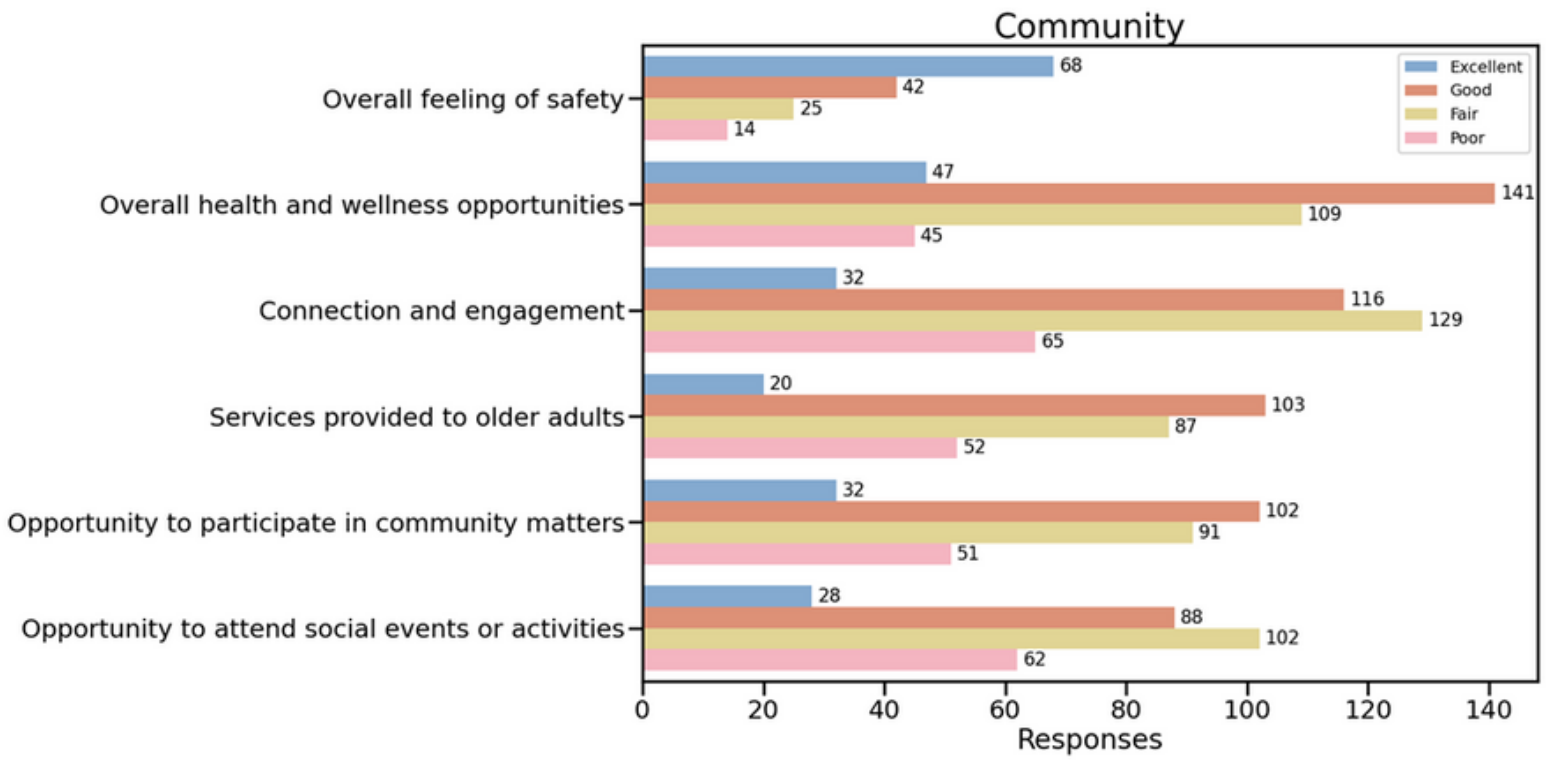
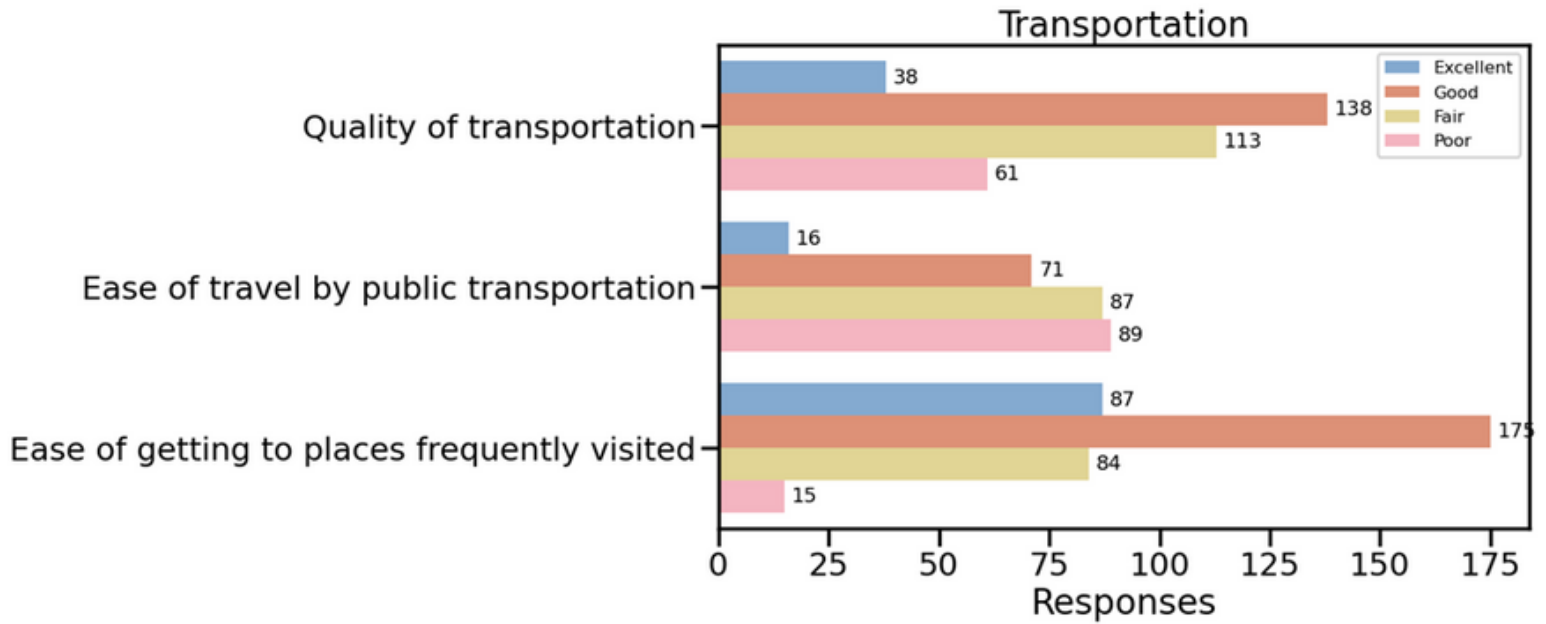
## Questionnaire Answers



# Needs Assessment and Targeting

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## Demographics Continued

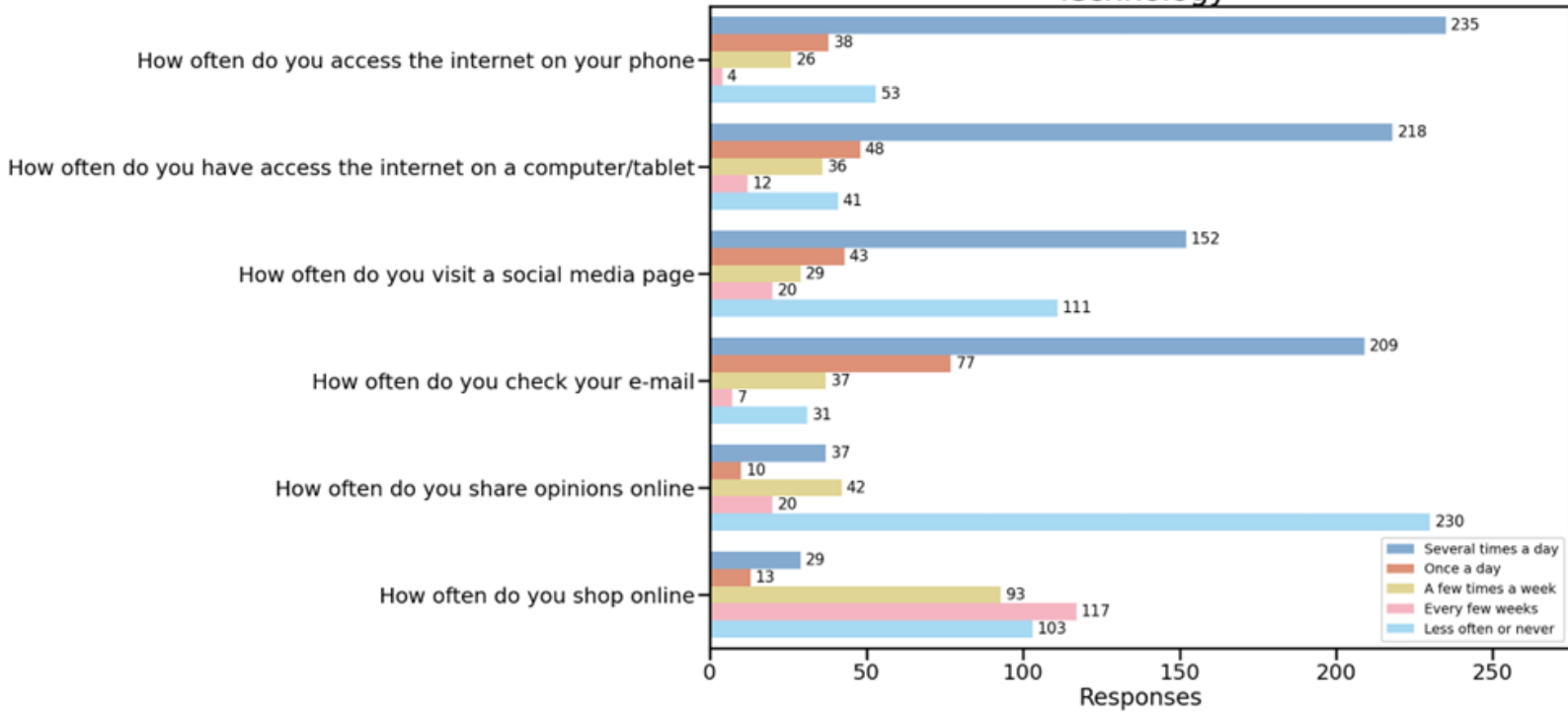


# Needs Assessment and Targeting

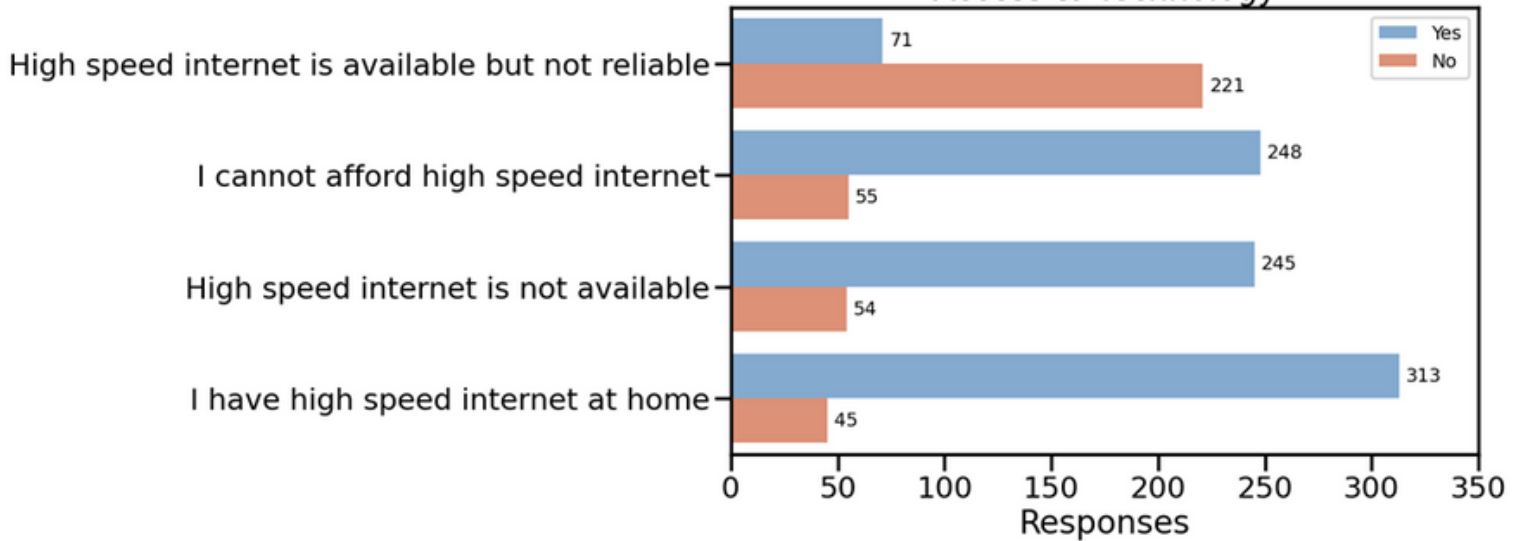
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## Demographics Continued

Technology



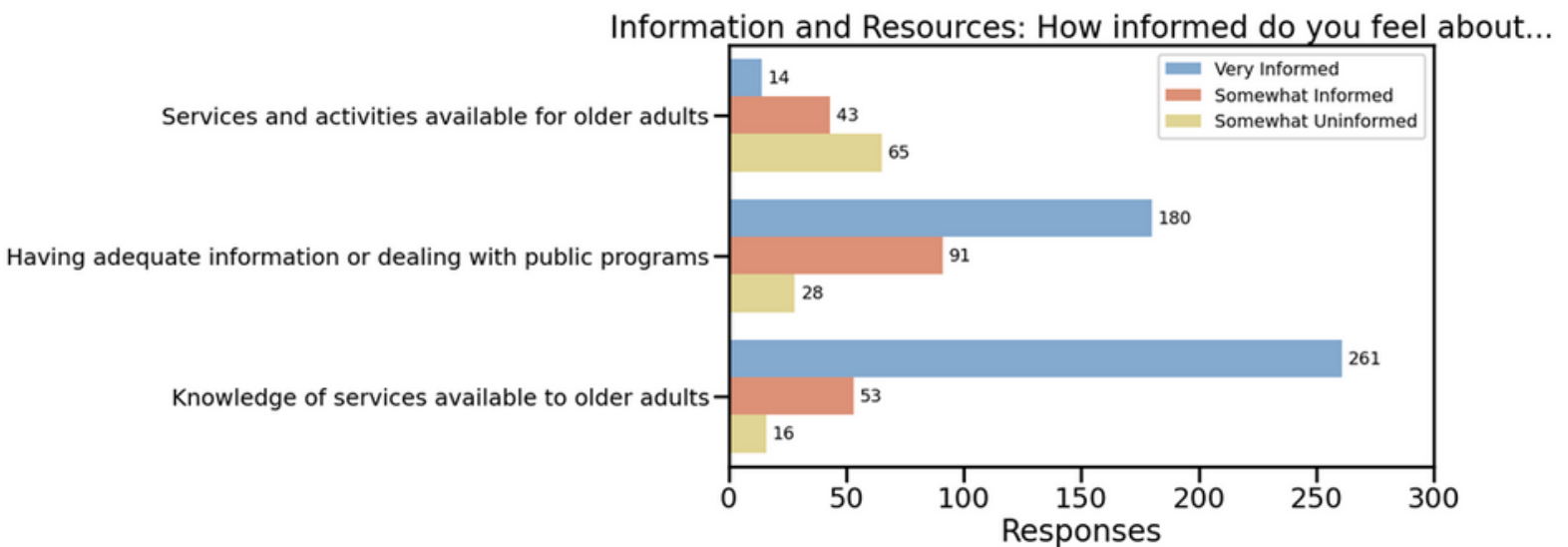
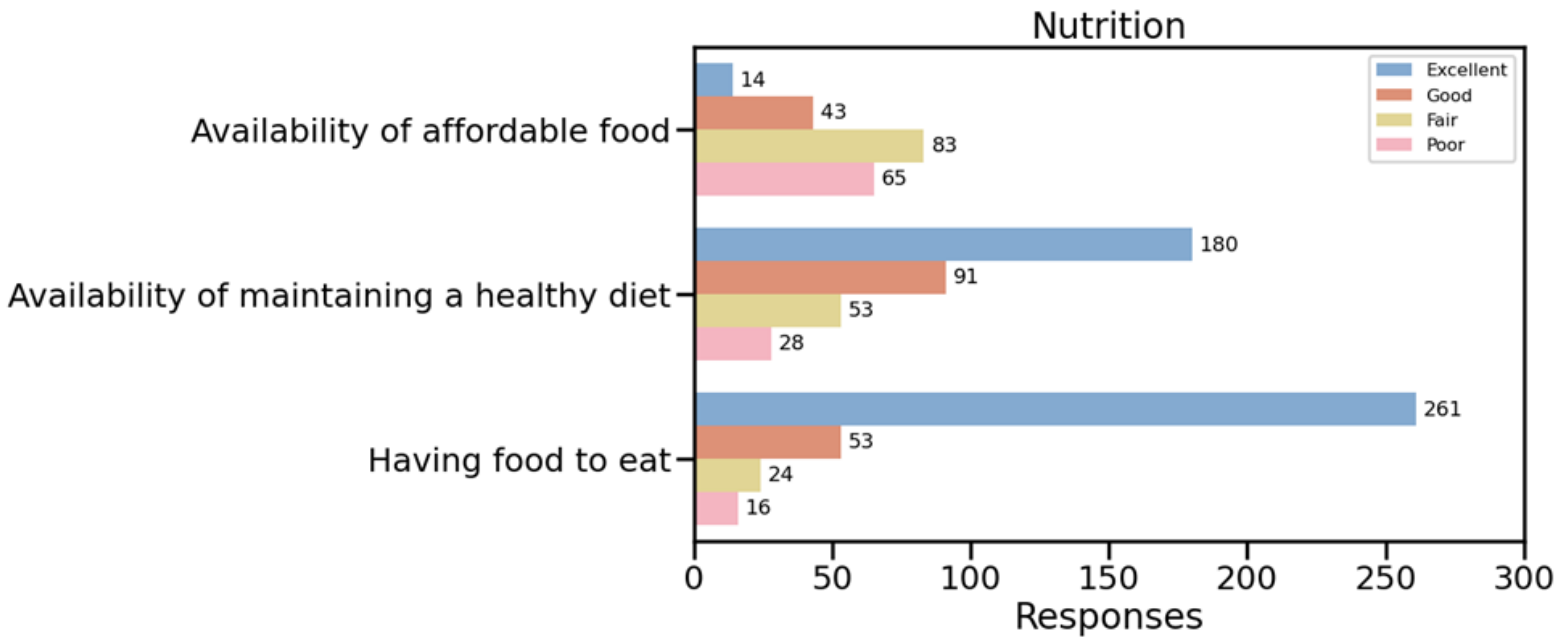
Access to Technology



# Needs Assessment and Targeting

Draft

## Demographics Continued



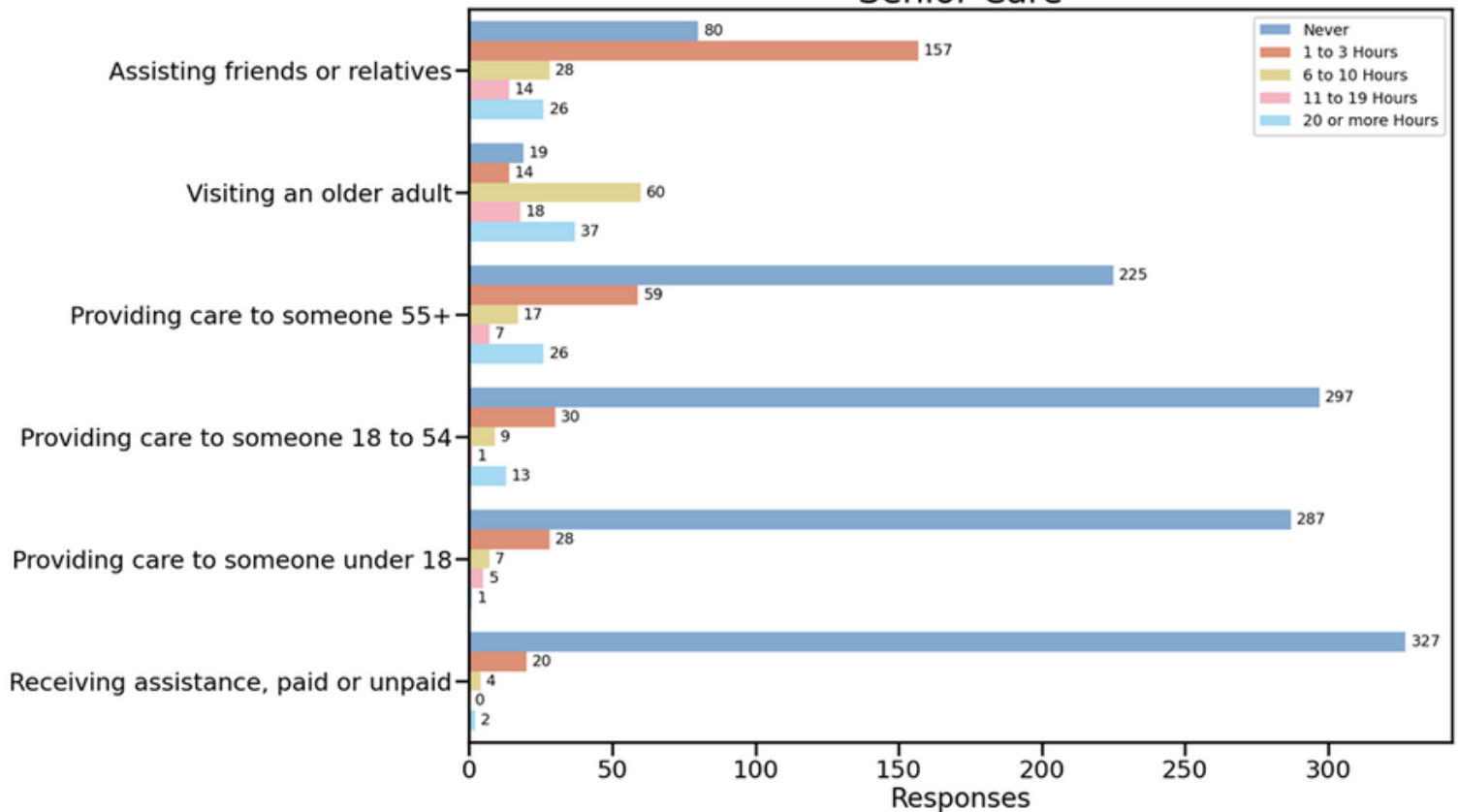


# Needs Assessment and Targeting

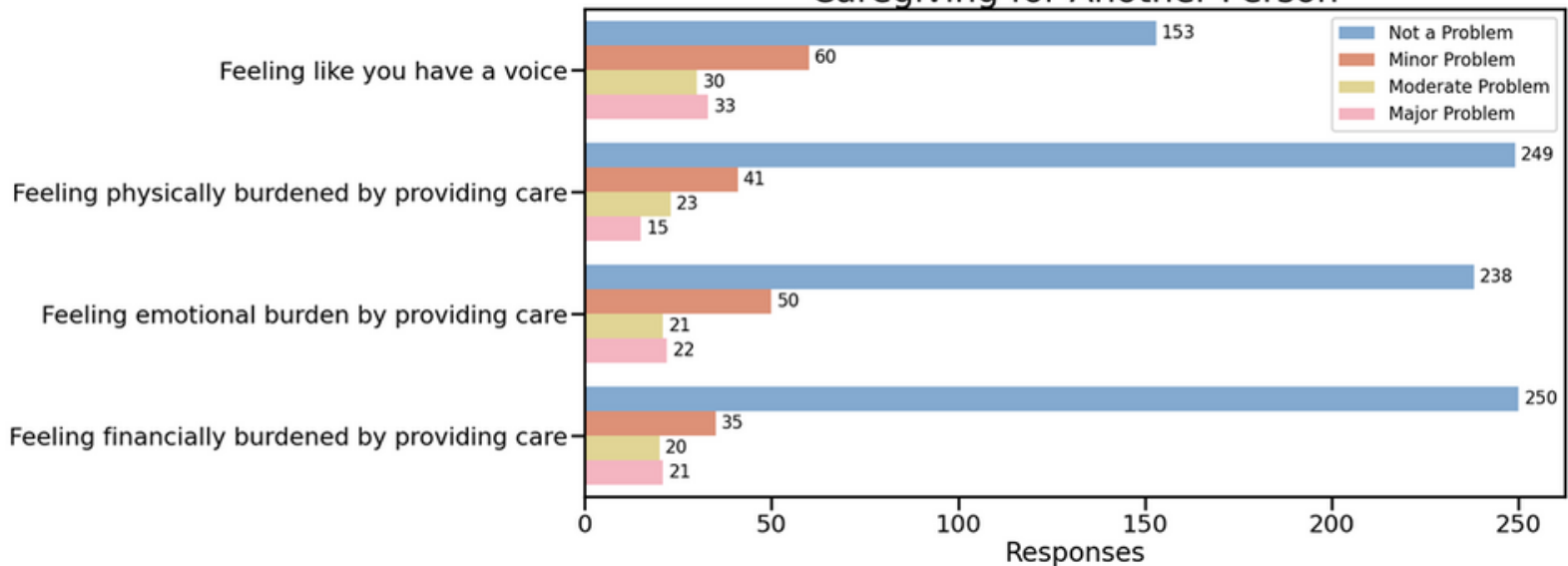
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## Demographics Continued

### Senior Care



### Caregiving for Another Person



# Needs Assessment and Targeting

Draft

## Demographics Continued

The top three issues identified amongst respondents were:

- Equitable access to all resources, information and services with an emphasis on marginalized communities (Demographic Chart)
- Knowing where to turn for information on benefits/services for older adults and caregivers (Resources and Information, and Caregiver graphs)
- Need for modernization of services for equitable access and participation of service (Community and Nutrition graphs)

## Resources

There are a variety of services and resources available throughout the County to assist older adults, adults living with disabilities and their caregivers. An entry point for an older adult to receive assistance is by calling SIA staff at 1-800-510-2020. In addition, San Bernardino County's Aging and Disability Resource Connection's (ADRC) No Wrong Door approach, developed a partnership with Rolling Start, a not-for-profit disability organization, and 2-1-1. SIA, Rolling Start and 2-1-1 provide information about services that are detailed in the Older Americans Act (OAA), as well as information regarding non-funded OAA resources.

## Title III E Services – Family Caregiver Support Program (FCSP)

FCSP provides a variety of support services to unpaid family caregivers. Program services include, but are not limited to, respite care, supportive services, supplemental services, access assistance and information services. Currently there are two vendors providing these services. A careful review of the needs assessment will be conducted to determine the needs of older adults in the County to expand support provided by these and any potential future providers in the future.

## Adequate Proportion

One of the many considerations for determining adequate proportion of Title IIIB funds for Supportive Services are the needs identified in the assessment. Factors determining adequate proportion include the following: 1) the availability of services in the County 2) historical use of services; and 3) requests for services. Title IIIB provides a variety of services to address functional limitations, maintain health and independence, and promote access to services. The following is a list of services available: personal care, homemaker, chore, adult day care, case management, assisted transportation, transportation, legal assistance, information and assistance, and outreach

# Needs Assessment and Targeting

Draft

## Access Services

The Title IIIB Senior Information and Assistance program is the entry point to services for DAAS - PG. SIA staff assess individual needs, make referrals to local services or programs, and links individuals to the services and opportunities available. To the extent possible, staff will offer a follow-up call to all individuals who were linked to services to determine if service needs were fully met. As such, a minimum percentage level of 40% for IIIB funds is allocated to access.

## In-Home Services

Historically, the County has found that providing IIIB Chore Services is financially costly and requires a high level of staff involvement. In addition, requests for these services in geographically isolated areas of the County can be difficult to provide because of the availability of vendors. As a result, DAAS - PG has ensured that a minimum of a 5% of IIIB funds will be allocated to continue to promote and provide services to those in need.

## Legal Services

Legal services can be costly for older adults and are often a service of immediate need. DAAS - PG will allocate a minimum of 10% of IIIB funds to Legal Assistance. The responses of the assessment will also be shared with current IIIB contracted providers to assist outreach efforts in the communities served.

## Targeting Defined

Targeting as defined by the California Code of Regulations (22 CCR Section 7310) requires that the AAA target services with the following characteristics:

- Older individuals with the greatest economic need, with particular attention to low-income minority individuals.
- Older individuals with the greatest social need, with particular attention to low-income minority individuals.
- Older Native Americans.

# Needs Assessment and Targeting

Draft

## Targeting Defined-Continued

In addition, Section 7310 directs the AAA to use outreach efforts to identify individuals eligible for assistance under Federal law with special emphasis to the following groups:

- Who reside in rural areas.
- Who have greatest economic need, with particular attention to low-income minority individuals.
- Who have greatest social need, with particular attention to low-income minority individuals.
- With severe disabilities.
- With limited English-speaking ability.
- With Alzheimer's disease or related disorders with neurological and organic brain dysfunction and the caretakers of these individuals.

## Targeted Populations

The DAAS - PG strives to meet continually the targeting requirements of the OAA and the California Code of Regulations. Target populations are spread throughout the 20,000+ square miles of the County. Overall, older individuals living in remote and geographical isolated areas of the County present unique challenges as resources and providers are limited and can be made more difficult during weather events. Older adults with the greatest economic need are dispersed throughout the County. Financially, many older adults have needs at the federal poverty level but also at the levels identified by the Elder Index. Minority, older individuals tend to be concentrated in the valley area of the County where the majority of the population is located. The urbanized valley area has access to the greatest variety of resources, not only by number but also by variety of providers, including operations of local government, not-for-profit and for-profit service providers.

Generally, older adults located in the rural and isolated areas of the County have the greatest social need. Most rural populations are located in the mountains and desert areas. This is the primary reason DAAS - PG provides IIIB assistance for senior center activities in the remote and isolated communities of Trona, Lucerne Valley, Needles, Big River, Phelan, and the Morongo Basin. An active and open senior center provides a gathering point for older adults as well as an opportunity for the dissemination of accurate information. Senior Information and Assistance (SIA) staff visit these centers and provide outreach a minimum of once per month.

# Needs Assessment and Targeting

Draft

## Targeted Populations Continued

Current Polco survey results of the 1,026 participants show those who answered questions regarding sexual orientation demographics to be approximately 1% of the older population that identifies as bisexual, with approximately 7% of this population identifying as gay. DAAS - PG will continue to build from this survey by creating new questions that directly reflect community needs, in order to continue providing equitable access to services or services that may not have been considered in the past. These assessments will also include questions for persons living with human immunodeficiency virus (HIV) or acquired immunodeficiency syndrome (AIDS) or other chronic conditions. There is also a survey in progress via the California Department of Aging and the University of San Francisco that is entirely focused on gathering information specific to California residents of the LGBTQIA+ community in the mid-life to older adult range. The Department will look to the results of this survey in concert with its needs assessment, in order to build programs focused on serving community members living with HIV/AIDS. The Native American Indian and Alaska Native population is 2.2% (U.S. Census Bureau July 1, 2023) of the overall San Bernardino County population. Title III services are available to all eligible County residents and SIA staff will initiate and focus outreach efforts to include this particular population.

There are a limited number of contracted service providers in the remote and isolated areas of the County. As such, an open contract procurement process is utilized with an emphasis to provide the most desired and needed services to targeted populations in areas where organizations are unable to propose to provide services, especially to the farthest-reaching areas of the County. To minimize this impact, DAAS - PG staff continually provides advice and technical assistance to our volunteer, and non-profit organizations striving to provide services in rural areas.

Senior Information and Assistance (SIA) staff are located at six sites geographically dispersed throughout the County. From these locations they perform outreach to the older adult community in all areas of the County. SIA staff report an increase in need throughout the County for more bus passes and increase funding and resources to be made available for necessary home modifications which support the Countywide vision of aging in the community.

# Needs Assessment and Targeting

Draft

## Targeted Population Continued

San Bernardino County continues to work on increasing minority participation. This is particularly important with the increase in the Hispanic/Latino population which is now at 56.2% (U.S. Census Bureau, July 1, 2023). Brochures are available in English and Spanish, and several SIA staff are bilingual which enables assistance to those who are non-English speaking not only daily but also at health fairs and other community events. The Senior Affairs Commission (SAC) and the Regional Councils on Aging continually provides input about older individuals and individuals living with a disability. Frequently, the information is at the individual level of a particular older person, as opposed to the global needs of the entire older population. They also communicate trends observed or discussed during their visits to senior centers and congregate nutrition sites.

Finally, the COVID-19 pandemic introduced special challenges in DAAS - PG efforts to serve target populations. New strategies have since been adopted to keep older individuals, individuals with disabilities and their caregivers safe while continuing to meet the needs. The following actions can now be activated in response to public safety events such as severe weather or outbreaks of communicable illnesses:

- Due to the closure of regular outreach locations (senior centers, senior housing complexes, and farmers markets) SIA staff initiated proactive outreach through check-in calls with registered clients.
- SIA staff have remained in contact with senior centers to keep track of their operations, plans, and COVID-19 services such as testing and meal distribution.
- DAAS - PG partnered with 2-1-1 San Bernardino County to share a resource directory and dedicate two SIA staff members as resource specialists for direct referrals from 2-1-1.
- SIA assigned one staff member to serve as an on-call senior service specialist for the countywide Joint Information Center hotline.
- SIA maintained in-person appointments for cash/material aid distribution while abiding by strict social distancing guidelines.
- SIA extended its hours to 7 p.m. nightly and expanded its days of service to Saturdays and Sundays.

Ombudsman shifted its monitoring responsibilities to regular, comprehensive phone based and quarterly visits with facilities, liaising between client families and facilities.



Aging and Adult Services  
Public Guardian

# Draft

# Priority Service & Public Hearings



# Priority Service & Public Hearings

Draft

## Purpose

This section documents the AAA’s public hearings, which provide older adults, adults with disabilities, and their caregivers the opportunity to comment on the development and content of the Area Plan. This section also provides information on how the AAA allocates federal funds for Access, In-Home, and Legal Assistance services

## 2024-2028 Four-Year Planning Cycle

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

The minimum percentages of applicable Title IIIB funds 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 AAA, and discussions at public hearings on the Area Plan.

### **Category of Service and the Percentage of Title IIIB Funds expended in/or to be expended in FY 2024-25 through FY 2027-28**

#### **Access**

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

Fiscal Year	2024-25	2025-26	2026-27	2027-28
Percentage	40%			

#### **In-Home Services**

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

Fiscal Year	2024-25	2025-26	2026-27	2027-28
Percentage	5%			





# Priority Service & Public Hearings

Draft

## 2024-2028 Four-Year Planning Cycle Continued

### Category of Service and the Percentage of Title IIIB Funds expended in/or to be expended in FY 2024-25 through FY 2027-2028

#### Legal Assistance Required Activities

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

Fiscal Year	2024-25	2025-26	2026-27	2027-28
Percentage	10%			

Allocations reflect historical funding trends and public feedback. The included needs assessment lists in-home services, namely home repairs, as one of the top needs among those surveyed. The in-home services proportion has been raised in response to that need. The AAA provides some IIIB access direct services (primarily Information and Assistance and Outreach). In-home services are provided by contracted vendors and finding providers who can economically provide in-home services in a county of such large geographical size and variation remains a challenge. Legal services are also contracted; the current vendor meets or exceeds expectations of providing countywide services.



# Priority Service & Public Hearings

Draft

## 2024-2028 Four-Year Planning Cycle Continued

### **PUBLIC HEARING:**

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 2020, Section 314(c)(1).

Fiscal Year	Date	Location	Number of Attendees	Presented in languages other than English?	Located at a Long-Term Care Facility?
2024-2025	3/20/2024	784 East Hospitality Ln. San Bernardino, CA 92415		Yes	No
2025-2026					
2026-2027					
2027-2028					



# Priority Service & Public Hearings

Draft

## 2024-2028 Four-Year Planning Cycle Continued

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

Summarization of outreach efforts used in seeking input for the Area Plan from institutionalized, homebound, and/or disabled older individuals.

**Public Meetings are scheduled at 4 different locations and coordinated with the Regional Councils on Aging on the following dates:**

**West Valley – March 5, 2024**

**East Valley – March 7, 2024**

**Victor Valley – March 12, 2024**

**Morongo Basin – March 18, 2024**

**Mountain Region – March 21, 2024**

Public Meeting notices are posted and distributed in advance of every meeting.

Area Plan surveys were distributed to Title IIIC Home-Delivered clients by delivery drivers and distributed to all clients by Ombudsman staff. Senior Information and Assistance (SIA) staff distributed community input documents at senior centers as well as posting them for public viewing. Posting was shared to all contracted partners and program participants.

The Public Hearing was advertised in the San Bernardino Daily Journal in accordance with California Code of Regulations (CCR), Title 22 CA Section 7308. All contracted providers, incorporated cities, and American Indian tribal governments in San Bernardino County received written notice. The Public Hearing notice was also posted at senior centers and congregate meals sites.

In the weeks leading up to the Public Hearing, representatives of the Department of Aging and Adult Services - Public Guardian (DAAS - PG) attended Regional Council on Aging (RCA) meetings and Senior Affairs Commission (SAC) Committees and provided a summarized presentation of the Area Plan Update. A flyer with the Public Hearing information was shared with all contracted vendors including the Ombudsman contractor to distribute to program participants, partners, and long-term care facilities.

# Priority Service & Public Hearings

Draft

## 2024-2028 Four-Year Planning Cycle Continued

1. Were proposed expenditures for Program Development (PD) or Coordination (C) discussed?
  - a.  Yes. Go to question #3
  - b.  Not applicable, PD and/or C funds are not used. Go to question #4
2. Summarize the comments received concerning proposed expenditures for PD and/or C
3. Attendees were provided the opportunity to testify regarding setting minimum percentages of Title IIIB program funds to meet the adequate proportion of funding for Priority Services
  - a.  Yes. Go to question #5
  - b.  No, Explain:
4. Summarize the comments received concerning minimum percentages of Title IIIB funds to meet the adequate proportion of funding for priority services.
5. List any other issues discussed or raised at the public hearing.

**Note: This section is to be updated with any changes to the Area Plan based on comments and results by attendees.**



Aging and Adult Services  
Public Guardian

Draft

# Area Plan Narrative Goals and Objectives



# Area Plan Narrative Goals and Objectives

Draft

## Purpose

This section provides information regarding AAA services and activities developed from the needs assessment findings and identification of priorities. The goals of the Department include the reasoning behind the need, followed by the objectives AAA are focusing on providing and/or creating.

## Goal #1

**Focused outreach to disseminate information and educate older adults, adults with disabilities and caregivers on available resources within PSA 20. Increased focus on targeting marginalized populations and those more at risk and need.**

**Rationale:** There is a need for information and outreach particularly in rural and geographically isolated areas. The non-use of available services and resources is due to a lack of knowledge and awareness that they exist by the marginalized population and those most at risk and need. Expanding and strengthening collaborations with other public entities and service providers will increase awareness of resources available to improve the quality of life for older adults, adults with disabilities, and caregivers.

- **Objective #1:** Participate and present information in quarterly meetings with the Senior Affairs Commission, Regional Councils on Aging, and service providers to increase awareness of OAA resources and Area Plan units on services provided to older adults, adults living with disabilities, and caregivers throughout San Bernardino County.
- **Objective #2:** Senior Information and Assistance staff will provide outreach to targeted populations which include the following categories: minority 60 plus, low income 60 plus, geographically isolation 60 plus, and the Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, Asexual (LGBTQIA+), community.
- **Objective #3:** Senior Information and Assistance staff will strengthen the awareness of PSA 20 programs and services by distributing comprehensive outreach materials at senior centers, senior housing complexes, health fairs, senior expos, and various senior related community events. Staff efforts will continue to be modified to stay aligned with the Master Plan on Aging.

# Area Plan Narrative Goals and Objectives

Draft

## Goal #1 Continued

**Focused outreach to disseminate information and educate older adults, adults with disabilities and caregivers on available resources within PSA 20. Increased focus on targeting marginalized populations and those more at risk and need.**

- **Objective #4:** Program Analysts will strengthen partnerships with providers to expand education and information about the totality of OAA programs and services to their clients. Create collaborative community engagements that will help communicate, promote, and distribute information throughout the County, with a emphasis on the Black, Indigenous and people of color (BIPOC) communities.
- **Objective #5:** Program Analysts will establish new partnerships with community entities for the expansion of outreach and distribution of services and resources to older adults, adults living with disabilities, their families and caregivers throughout San Bernardino County.

Objective	Projected Start and End Dates	Title IIIB Funded PD or C2	Update Status
Objective #1	07/01/24-06/30/28		New
Objective #2	07/01/24-06/30/28		New
Objective #3	07/01/24-06/30/28		New
Objective #4	07/01/24-06/30/28		New
Objective #5	07/01/24-06/30/28		New



# Area Plan Narrative Goals and Objectives

Draft

## Goal #2

**DAAS - PG will evaluate and strengthen current services under the Family Caregiver Support Program (FCSP) for caregivers and older relative caregivers in order to ensure older adults, adults living with disabilities, their families and caregivers receive information that will assist with their care and conditions.**

**Rationale:** A need for information regarding caregiving services was identified in alignment with the California Master Plan on Aging. In order to improve the quality and quantity of caregiver and recipient care, it is essential for caregivers to be made aware of available support services and programs available through the County.

- **Objective #1:** Work close with the Senior Affairs Commission to create a partnership and collaborate with Inland Caregiver Resource Center, Kindship and other Caregiving providers and community entities in the distribution of information and resources.
- **Objective #2:** Increase awareness of programs and services to caregivers through focused outreach efforts by Senior Information and Assistance staff by providing community education on caregiving, caregiving information, assistance at senior centers, senior housing complexes, health fairs, senior expos, and various senior related community events.
- **Objective #3:** Collaborate with providers of services to evaluate and monitor the effectiveness of caregiver outreach, public information, community education, caregiver training, and caregiver information and assistance.
- **Objective #4:** Work with providers to ensure outreach efforts are conveying current and pertinent information on topics needed as well as Title III E services available to all caregivers.

Objective	Projected Start and End Dates	Title IIIB Funded PD or C2	Update Status
Objective #1	07/01/24-06/30/28		New
Objective #2	07/01/24-06/30/28		New
Objective #3	07/01/24-06/30/28		New
Objective #4	07/01/24-06/30/28		New





# Area Plan Narrative Goals and Objectives

Draft

## Goal #3

**Certifying quality of services of contractors and the continuous modernization of service efforts to address the identified needs of older adults, adults living with disabilities, their families and caregivers.**

**Rationale:** The quality of services and delivery of services by contractors will be improved through the modernization and consistent performance monitoring to address the needs of program clients.

- **Objective #1:** Participate and present information in quarterly meetings with the Senior Affairs Commission, Regional Councils on Aging, and service providers to increase awareness of OAA resources and Area Plan units on services provided to older adults, adults living with disabilities, their families and caregivers throughout San Bernardino County.
- **Objective #2:** Needs assessment results and collected data will be analyzed and discussed in quarterly provider meetings to expand feedback and ideas on improving and modernizing services to meet trending needs.
- **Objective #3:** Provider service unit targets will be monitored monthly by the assigned Program and Fiscal Analysts and discussed in the monthly Provider Service Unit Report. Program and Fiscal Analysts will measure performance on established contract service units and funding targets as well as all elements of the required provider work plan.
- **Objective #4:** Establish data dashboard and modernize Wellsky software program so that data can be accessed efficiently to monitor Title III programs. All Analysts will be working directly with Area Plan programs to have training on how to continue the expansion and collection of data that can help to better collect and identify data trends.
- **Objective #5:** Identify gaps in services by incorporating applicable questions to our service providers' customer satisfaction surveys. Survey results will provide a more concrete list of services needed by older adults throughout the County. DAAS - PG can use the identified gaps in services to modernize and develop plans to help meet the needs of those served by Area Plan services.

# Area Plan Narrative Goals and Objectives

Draft

## Goal #3 Continued

**Certifying quality of services of contractors and the continuous modernization of service efforts to address the identified needs of older adults, adults living with disabilities, their families and caregivers.**

Objective	Projected Start and End Dates	Title IIIB Funded PD or C2	Update Status
Objective #1	07/01/24-06/30/28		New
Objective #2	07/01/24-06/30/28		New
Objective #3	07/01/24-06/30/28		New
Objective #4	07/01/24-06/30/28		New
Objective #5	07/01/24-06/30/28		New





Aging and Adult Services  
Public Guardian

# Draft

# Service Unit Plan (SUP)



# Service Unit Plan (SUP)

Draft

## TITLE III/VII SERVICE UNIT PLAN CCR Article 3, Section 7300(d)

The Service Unit Plan (SUP) uses the Older Americans Act Performance System (OAAPS) Categories and units of service. They are defined in the OAAPS State Program Report (SPR).

Below you will find the units of services to be provided with all regular Area Plan funding sources. Related funding is reported in the annual Area Plan Budget (CDA 122) for Titles IIIB, IIIC-1, IIIC-2, IIID, and VII

Fiscal Year 2024-2025			
Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Personal Care	150	1 and 3	1 (2-3) and 3
Homemaker	1,200	1 and 3	1 (2-3) and 3
Chore	1,000	1 and 3	1 (2-3) and 3
Adult Day Care	150	1 and 3	1 (2-3) and 3
Assisted Transportation	11,000	1 and 3	1 (2-3) and 3
Transportation	90,000	1 and 3	1 (2-3) and 3
Information and Assistance	30,000	1 and 3	1 (2-3) and 3 (5)
Outreach	14,000	1 and 3	1 (2-3) and 3 (5)
Legal Assistance	5,000	1 and 3	1 (2-3) and 3 (5)
Congregate Meals	312,600	1 and 3	1 (2-3) and 3 (5)
Home-Delivered Meals	375,000	1 and 3	1 (2-3) and 3 (5)
Nutrition Education	50	1 and 3	1 (2-3) and 3 (5)

# Service Unit Plan (SUP)

Draft

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

Fiscal Year 2025-2026			
Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Personal Care			
Homemaker			
Chore			
Adult Day Care			
Assisted Transportation			
Transportation			
Information and Assistance			
Outreach			
Legal Assistance			
Congregate Meals			
Home-Delivered Meals			
Nutrition Education			



# Service Unit Plan (SUP)

Draft

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

**Fiscal Year 2026-2027**

<b>Service</b>	<b>Proposed Units Of Service</b>	<b>Goal Numbers</b>	<b>Objective Numbers</b>
Personal Care			
Homemaker			
Chore			
Adult Day Care			
Assisted Transportation			
Transportation			
Information and Assistance			
Outreach			
Legal Assistance			
Congregate Meals			
Home-Delivered Meals			
Nutrition Education			



# Service Unit Plan (SUP)

Draft

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

**Fiscal Year 2027-2028**

<b>Service</b>	<b>Proposed Units Of Service</b>	<b>Goal Numbers</b>	<b>Objective Numbers</b>
Personal Care			
Homemaker			
Chore			
Adult Day Care			
Assisted Transportation			
Transportation			
Information and Assistance			
Outreach			
Legal Assistance			
Congregate Meals			
Home-Delivered Meals			
Nutrition Education			

# Service Unit Plan (SUP)

Draft

## TITLE III/VII SERVICE UNIT PLAN CONTINUED

### CCR Article 3, Section 7300(d)

#### OAAPS Service Category – “Other” Title III Services -Title IIIB, “Other” Priority and Non-Priority Supportive Services

- 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 Device, Registry, Senior Center Activities, and Senior Center Staffing.

Fiscal Year 2024-2025			
Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Residential Repairs/Modifications	100	1 and 3	1 (2-3) and 3 (5)
Senior Center Activities	6750	1 and 3	1 (2-3) and 3 (5)
Cash/Material Aid	350	1 and 3	1 (2-3) and 3 (5)
Community Education	400	1 and 3	1 (2-3) and 3 (5)
Housing	250	1 and 3	1 (2-3) and 3 (5)
Interpretation/Translation	3000	1 and 3	1 (2-3) and 3 (5)
Mobility Management Activities	600	1 and 3	1 (2-3) and 3 (5)
Personal Affairs Assistance	1550	1 and 3	1 (2-3) and 3 (5)



# Service Unit Plan (SUP)

Draft

## TITLE III/VII SERVICE UNIT PLAN CONTINUED

CCR Article 3, Section 7300(d)

OAAPS Service Category – “Other” Title III Services -Title IIIB, “Other” Priority and Non-Priority Supportive Services

Fiscal Year 2025-2026			
Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Residential Repairs/Modifications			
Senior Center Activities			
Cash/Material Aid			
Community Education			
Housing			
Interpretation/Translation			
Mobility Management Activities			
Personal Affairs Assistance			

# Service Unit Plan (SUP)

Draft

## TITLE III/VII SERVICE UNIT PLAN CONTINUED

CCR Article 3, Section 7300(d)

**OAAPS Service Category – “Other” Title III Services -Title IIIB, “Other” Priority and Non-Priority Supportive Services**

### Fiscal Year 2026-2027

Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Residential Repairs/Modifications			
Senior Center Activities			
Cash/Material Aid			
Community Education			
Housing			
Interpretation/Translation			
Mobility Management Activities			
Personal Affairs Assistance			

# Service Unit Plan (SUP)

Draft

## TITLE III/VII SERVICE UNIT PLAN CONTINUED

CCR Article 3, Section 7300(d)

**OAAPS Service Category – “Other” Title III Services -Title IIIB, “Other” Priority and Non-Priority Supportive Services**

**Fiscal Year 2027-2028**

Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Residential Repairs/Modifications			
Senior Center Activities			
Cash/Material Aid			
Community Education			
Housing			
Interpretation/Translation			
Mobility Management Activities			
Personal Affairs Assistance			



# Service Unit Plan (SUP)

Draft

## Title IIID Health Promotion Evidence-Based Programs

### Evidence-Based Program Name(s):

**“Walk with Ease”**: Evidence-based program that will be offered at a minimum of two sites throughout the County. Each class is six (6) weeks in duration and held three (3) times per week.

The “Walk with Ease” program is listed on the National Council on Aging website as a Title IIID Highest Tier Evidence-Based Health Promotion/Disease Prevention Program as reference 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.

**“Bingocize”**: Evidence-based program that will be at a minimum of two sites throughout the County. Each class is ten weeks in duration and held twice per week.

The “Bingocize” program is listed on the National Council on Aging website as a Title IIID Highest Tier Evidence-Based Health Promotion/Disease Prevention Program as reference in Program Memo 15-10. Bingocize provides a health education program that incorporates exercise, nutrition and fall prevention within the game of bingo.

**“Chronic Disease Self-Management Education and Tai Chi for Arthritis”**: Evidence-based programs that will be offered at a minimum of two (2) sites throughout the County and may be offered remotely via zoom as an alternative to in-person. Each class is eight to ten sessions and held once per week.

Both courses are listed on the National Council on Aging website as a Title IIID Highest Tier Evidence-Based Health Promotion/Disease Prevention Program as referenced in Program Memo 15-10.

# Service Unit Plan (SUP)

Draft

## Title III D Health Promotion Evidence-Based Programs

### Fiscal Year 2024-2025

Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Personal Affairs Assistance	700	1 and 3	1 (2-3) and 3(5)

### Fiscal Year 2025-2026

Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Personal Affairs Assistance			

### Fiscal Year 2026-2027

Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Personal Affairs Assistance			

### Fiscal Year 2027-2028

Service	Proposed Units Of Service	Goal Numbers	Objective Numbers
Personal Affairs Assistance			



# Service Unit Plan (SUP)

Draft

## HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (HICAP) SERVICE UNIT PLAN

CCR Article 3, Section 7300(d)  
WIC § 9535(b)

### **MULTIPLE PLANNING AND SERVICE AREA HICAPs (multi-PSA HICAP):**

CDA contracts with 33 AAAs to locally manage and provide HICAP services in all 58 counties. Four AAAs are contracted to provide HICAP services in multiple Planning and Service Areas (PSAs). The “Managing” AAA is responsible for providing HICAP services in a way that is equitable among the covered service areas.

HICAP program measures are calculated from county-level data for all 33 PSAs. HICAP service-level data are reported in CDA’s Statewide HICAP Automated Reporting Program (SHARP) system per reporting requirements.

Information presented in the following pages is based on FY 2023/2024 target numbers as the State has not provided released target information for FY 2024/2025.

insurance



# Service Unit Plan (SUP)

Draft

## HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (HICAP) SERVICE UNIT PLAN

CCR Article 3, Section 7300(d)  
WIC § 9535(b)

### State Performance Measures - Fiscal Year 2024-2025

Measure	Target Number	Goal Number
PM 1.1 Estimated Clients Counseled	1353	
PM 1.2 Public and Media Events (PAM) (Estimated)	153	

### Federal Performance Measures - Fiscal Year 2024-2025

PM 2.1 Client Contacts (Interactive)	2834	
PM 2.2 PAM Outreach (Interactive)	473	
PM 2.3 Medicare Beneficiaries Under 65	174	
PM 2.4 Hard to Reach	0	
PM 2.4a LIS	1184	
PM 2.4b Rural	0	
PM 2.4c ESL	354	
PM 2.5 Enrollment Contacts (Qualifying)	2348	

### HICAP Legal Services Units of Service - Fiscal Year (FY) 2024-2025

PM 3.1 Estimated Number of Clients Represented Per FY (Unit of Service)	2348	
PM 3.2 Estimated Number of Legal Representation Hours Per FY (Unit of Service)	N/A	
PM 3.3 Estimated Number of Program Consultation Hours Per FY (Unit of Service)	N/A	



# Service Unit Plan (SUP)

Draft

**HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (HICAP)**  
**SERVICE UNIT PLAN CONTINUED**

**CCR Article 3, Section 7300(d)**  
**WIC § 9535(b)**

**State Performance Measures - Fiscal Year 2025-2026**

Measure	Target Number	Goal Number
PM 1.1 Estimated Clients Counseled		
PM 1.2 Public and Media Events (PAM) (Estimated)		

**Federal Performance Measures - Fiscal Year 2025-2026**

PM 2.1 Client Contacts (Interactive)		
PM 2.2 PAM Outreach (Interactive)		
PM 2.3 Medicare Beneficiaries Under 65		
PM 2.4 Hard to Reach		
PM 2.4a LIS		
PM 2.4b Rural		
PM 2.4c ESL		
PM 2.5 Enrollment Contacts (Qualifying)		

**HICAP Legal Services Units of Service - Fiscal Year 2025-2026**

PM 3.1 Estimated Number of Clients Represented Per FY (Unit of Service)		
PM 3.2 Estimated Number of Legal Representation Hours Per FY (Unit of Service)		
PM 3.3 Estimated Number of Program Consultation Hours Per FY (Unit of Service)		





# Service Unit Plan (SUP)

Draft

## HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (HICAP) SERVICE UNIT PLAN CONTINUED

CCR Article 3, Section 7300(d)  
WIC § 9535(b)

### State Performance Measures - Fiscal Year 2026-2027

Measure	Target Number	Goal Number
PM 1.1 Estimated Clients Counseled		
PM 1.2 Public and Media Events (PAM) (Estimated)		

### Federal Performance Measures - Fiscal Year 2026-2027

PM 2.1 Client Contacts (Interactive)		
PM 2.2 PAM Outreach (Interactive)		
PM 2.3 Medicare Beneficiaries Under 65		
PM 2.4 Hard to Reach		
PM 2.4a LIS		
PM 2.4b Rural		
PM 2.4c ESL		
PM 2.5 Enrollment Contacts (Qualifying)		

### HICAP Legal Services Units of Service - Fiscal Year (FY) 2026-2027

PM 3.1 Estimated Number of Clients Represented Per FY (Unit of Service)		
PM 3.2 Estimated Number of Legal Representation Hours Per FY (Unit of Service)		
PM 3.3 Estimated Number of Program Consultation Hours Per FY (Unit of Service)		

# Service Unit Plan (SUP)

Draft

## HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (HICAP) SERVICE UNIT PLAN CONTINUED

CCR Article 3, Section 7300(d)  
WIC § 9535(b)

### State Performance Measures - Fiscal Year 2027-2028

Measure	Target Number	Goal Number
PM 1.1 Estimated Clients Counseled		
PM 1.2 Public and Media Events (PAM) (Estimated)		

### Federal Performance Measures - Fiscal Year 2027-2028

PM 2.1 Client Contacts (Interactive)		
PM 2.2 PAM Outreach (Interactive)		
PM 2.3 Medicare Beneficiaries Under 65		
PM 2.4 Hard to Reach		
PM 2.4a LIS		
PM 2.4b Rural		
PM 2.4c ESL		
PM 2.5 Enrollment Contacts (Qualifying)		

### HICAP Legal Services Units of Service - Fiscal Year 2027-2028

PM 3.1 Estimated Number of Clients Represented Per FY (Unit of Service)		
PM 3.2 Estimated Number of Legal Representation Hours Per FY (Unit of Service)		
PM 3.3 Estimated Number of Program Consultation Hours Per FY (Unit of Service)		

# Service Unit Plan (SUP)

Draft

## TITLE III E SERVICE UNIT PLAN

### CCR Article 3, Section 7300(d)

This Service Unit Plan (SUP) uses the 16 federally mandated service categories and providing a goal with associated objectives is mandatory for services provided. The goal states the big picture and the objectives are the road map (specific and measurable activities) for achieving the big picture goal.

**The following tables are for family caregivers of older adults and adults who are caring for an individual of any age with Alzheimer's disease or a related disorder with neurological and organic brain dysfunction.**

#### Direct and/or Contracted III E Services - 2024-2025

Measure	Units	Total Units	Goal Numbers	Objective Numbers
Caregiver Access Case Management	Hours	3400	2	1,2,4
Caregiver Access Information & Assistance	Contacts	430	2	1,2,4
Caregiver Information Services	Number of Activities & Audience	2	2	1,2,4
Caregiver Respite In-Home	Hours	3485	2	1,2,4
Caregiver Respite Other	Hours	2650	2	1,2,4
Caregiver Respite Out-of-Home/Daycare	Hours	1200	2	1,2,4
Caregiver Supplemental Services Assistive Technologies	Occurrences	108	2	1,2,4
Caregiver Supplemental Services Caregiver Assessment	Hours	615	2	1,2,4
Caregiver Supplemental Services Consumable Supplies	Occurrences	0	0	0
Caregiver Supplemental Services Caregiver Registry	Occurrences	100	2	1,2,4
Caregiver Supplemental Services Home Modifications	Occurrences	10	2	1,2,4
Caregiver Supplemental Services Legal Consultation	Contacts	0	0	0
Caregiver Support Groups	Sessions	367	2	1,2,4
Caregiver Support Training	Hours	1315	2	1,2,4
Caregiver Support Counseling	Hours	600	2	1,2,4
Caregiver Counseling	Hours	1300	2	1,2,4

# Service Unit Plan (SUP)

Draft

**TITLE III E**  
**SERVICE UNIT PLAN CONTINUED**  
**CCR Article 3, Section 7300(d)**

**Direct and/or Contracted III E Services - 2025-2026**

Measure	Units	Total Units	Goal Numbers	Objective Numbers
Caregiver Access Case Management	Hours			
Caregiver Access Information & Assistance	Contacts			
Caregiver Information Services	Number of Activities & Audience			
Caregiver Respite In-Home	Hours			
Caregiver Respite Other	Hours			
Caregiver Respite Out-of-Home/Daycare	Hours			
Caregiver Supplemental Services Assistive Technologies	Occurrences			
Caregiver Supplemental Services Caregiver Assessment	Hours			
Caregiver Supplemental Services Caregiver Registry	Occurrences			
Caregiver Supplemental Services Consumable Supplies	Occurrences			
Caregiver Supplemental Services Home Modifications	Occurrences			
Caregiver Supplemental Services Legal Consultation	Contacts			
Caregiver Support Groups	Sessions			
Caregiver Support Training	Hours			
Caregiver Support Counseling	Hours			
Caregiver Counseling	Hours			



# Service Unit Plan (SUP)

Draft

**TITLE III E**  
**SERVICE UNIT PLAN CONTINUED**  
**CCR Article 3, Section 7300(d)**

**Direct and/or Contracted III E Services - 2026-2027**

Measure	Units	Total Units	Goal Numbers	Objective Numbers
Caregiver Access Case Management	Hours			
Caregiver Access Information & Assistance	Contacts			
Caregiver Information Services	Number of Activities & Audience			
Caregiver Respite In-Home	Hours			
Caregiver Respite Other	Hours			
Caregiver Respite Out-of-Home/Daycare	Hours			
Caregiver Supplemental Services Assistive Technologies	Occurrences			
Caregiver Supplemental Services Caregiver Assessment	Hours			
Caregiver Supplemental Services Caregiver Registry	Occurrences			
Caregiver Supplemental Services Consumable Supplies	Occurrences			
Caregiver Supplemental Services Home Modifications	Occurrences			
Caregiver Supplemental Services Legal Consultation	Contacts			
Caregiver Support Groups	Sessions			
Caregiver Support Training	Hours			
Caregiver Support Counseling	Hours			
Caregiver Counseling	Hours			



# Service Unit Plan (SUP)

Draft

**TITLE III E**  
**SERVICE UNIT PLAN CONTINUED**  
**CCR Article 3, Section 7300(d)**

**Direct and/or Contracted III E Services - 2027-2028**

Measure	Units	Total Units	Goal Numbers	Objective Numbers
Caregiver Access Case Management	Hours			
Caregiver Access Information & Assistance	Contacts			
Caregiver Information Services	Number of Activities & Audience			
Caregiver Respite In-Home	Hours			
Caregiver Respite Other	Hours			
Caregiver Respite Out-of-Home/Daycare	Hours			
Caregiver Supplemental Services Assistive Technologies	Occurrences			
Caregiver Supplemental Services Caregiver Assessment	Hours			
Caregiver Supplemental Services Caregiver Registry	Occurrences			
Caregiver Supplemental Services Consumable Supplies	Occurrences			
Caregiver Supplemental Services Home Modifications	Occurrences			
Caregiver Supplemental Services Legal Consultation	Contacts			
Caregiver Support Groups	Sessions			
Caregiver Support Training	Hours			
Caregiver Support Counseling	Hours			
Caregiver Counseling	Hours			



# Service Unit Plan (SUP)

Draft

**TITLE III**  
**SERVICE UNIT PLAN CONTINUED**  
**CCR Article 3, Section 7300(d)**  
**Older Relative Caregivers**

**Direct and/or Contracted III E Services - 2024-2025**

Measure	Units	Total Units	Goal Numbers	Objective Numbers
Caregiver Access Case Management	Hours			
Caregiver Access Information & Assistance	Contacts	1050	2	1,2,4
Caregiver Information Services	Number of Activities & Audience			
Caregiver Respite In-Home	Hours			
Caregiver Respite Other	Hours			
Caregiver Respite Out-of-Home/Daycare	Hours			
Caregiver Supplemental Services Assistive Technologies	Occurrences			
Caregiver Supplemental Services Caregiver Assessment	Hours			
Caregiver Supplemental Services Caregiver Registry	Occurrences			
Caregiver Supplemental Services Consumable Supplies	Occurrences			
Caregiver Supplemental Services Home Modifications	Occurrences			
Caregiver Supplemental Services Legal Consultation	Contacts			
Caregiver Support Groups	Sessions			
Caregiver Support Training	Hours			
Caregiver Support Counseling	Hours			
Caregiver Counseling	Hours			



# Service Unit Plan (SUP)

Draft

**TITLE III**  
**SERVICE UNIT PLAN CONTINUED**  
**CCR Article 3, Section 7300(d)**  
**Older Relative Caregivers**

**Direct and/or Contracted III E Services - 2025-2026**

Measure	Units	Total Units	Goal Numbers	Objective Numbers
Caregiver Access Case Management	Hours			
Caregiver Access Information & Assistance	Contacts			
Caregiver Information Services	Number of Activities & Audience			
Caregiver Respite In-Home	Hours			
Caregiver Respite Other	Hours			
Caregiver Respite Out-of-Home/Daycare	Hours			
Caregiver Supplemental Services Assistive Technologies	Occurrences			
Caregiver Supplemental Services Caregiver Assessment	Hours			
Caregiver Supplemental Services Caregiver Registry	Occurrences			
Caregiver Supplemental Services Consumable Supplies	Occurrences			
Caregiver Supplemental Services Home Modifications	Occurrences			
Caregiver Supplemental Services Legal Consultation	Contacts			
Caregiver Support Groups	Sessions			
Caregiver Support Training	Hours			
Caregiver Support Counseling	Hours			
Caregiver Counseling	Hours			





# Service Unit Plan (SUP)

Draft

**TITLE III**  
**SERVICE UNIT PLAN CONTINUED**  
**CCR Article 3, Section 7300(d)**  
**Older Relative Caregivers**

**Direct and/or Contracted III E Services - 2026-2027**

Measure	Units	Total Units	Goal Numbers	Objective Numbers
Caregiver Access Case Management	Hours			
Caregiver Access Information & Assistance	Contacts			
Caregiver Information Services	Number of Activities & Audience			
Caregiver Respite In-Home	Hours			
Caregiver Respite Other	Hours			
Caregiver Respite Out-of-Home/Daycare	Hours			
Caregiver Supplemental Services Assistive Technologies	Occurrences			
Caregiver Supplemental Services Caregiver Assessment	Hours			
Caregiver Supplemental Services Caregiver Registry	Occurrences			
Caregiver Supplemental Services Consumable Supplies	Occurrences			
Caregiver Supplemental Services Home Modifications	Occurrences			
Caregiver Supplemental Services Legal Consultation	Contacts			
Caregiver Support Groups	Sessions			
Caregiver Support Training	Hours			
Caregiver Support Counseling	Hours			
Caregiver Counseling	Hours			

# Service Unit Plan (SUP)

Draft

**TITLE III**  
**SERVICE UNIT PLAN CONTINUED**  
**CCR Article 3, Section 7300(d)**  
**Older Relative Caregivers**

**Direct and/or Contracted III E Services - 2027-2028**

Measure	Units	Total Units	Goal Numbers	Objective Numbers
Caregiver Access Case Management	Hours			
Caregiver Access Information & Assistance	Contacts			
Caregiver Information Services	Number of Activities & Audience			
Caregiver Respite In-Home	Hours			
Caregiver Respite Other	Hours			
Caregiver Respite Out-of-Home/Daycare	Hours			
Caregiver Supplemental Services Assistive Technologies	Occurrences			
Caregiver Supplemental Services Caregiver Assessment	Hours			
Caregiver Supplemental Services Caregiver Registry	Occurrences			
Caregiver Supplemental Services Consumable Supplies	Occurrences			
Caregiver Supplemental Services Home Modifications	Occurrences			
Caregiver Supplemental Services Legal Consultation	Contacts			
Caregiver Support Groups	Sessions			
Caregiver Support Training	Hours			
Caregiver Support Counseling	Hours			
Caregiver Counseling	Hours			



# Service Unit Plan (SUP)

Draft

## TITLE VII ELDER ABUSE PREVENTION

The program conducting the Title VII Elder Abuse Prevention work is:

	Ombudsman Program
	Legal Services Provider
	Adult Protective Services
	Other (explain/list)

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

The agency receiving Title VII Elder Abuse Prevention funding is: **Wise & Healthy Aging Elder Abuse Prevention Program**

Title VII Elder Abuse Prevention Goals				
Total # of	2024-2025	2025-2026	2026-2027	2027-2028
Individuals Served	900			
Public Education Sessions	8			
Training Sessions for Professionals	8			
Training Sessions for Title IIIIE Caregivers	0			
Hours Spent Developing a Coordinated System	40			
Total Copies of Education Materials Distributed	1500			
Description of Educational Materials	Elder Justice Resource Guides, Mandated Reporter Flow Charts			

# Service Unit Plan (SUP)

Draft

## TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES

As mandated by the Reauthorization Act of the Older Americans Act of 2020, 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) 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.

### **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 2020, Section 712(a)(3), (5)]

### **Measures and Targets:**

A. **Complaint Resolution Rate** (NORS Element CD-08) (Complaint Disposition). The California statewide average complaint resolution rate for FY 2021-2022 was 57%.

# Service Unit Plan (SUP)

Draft

## TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES CONTINUED

### Measures and Targets Continued:

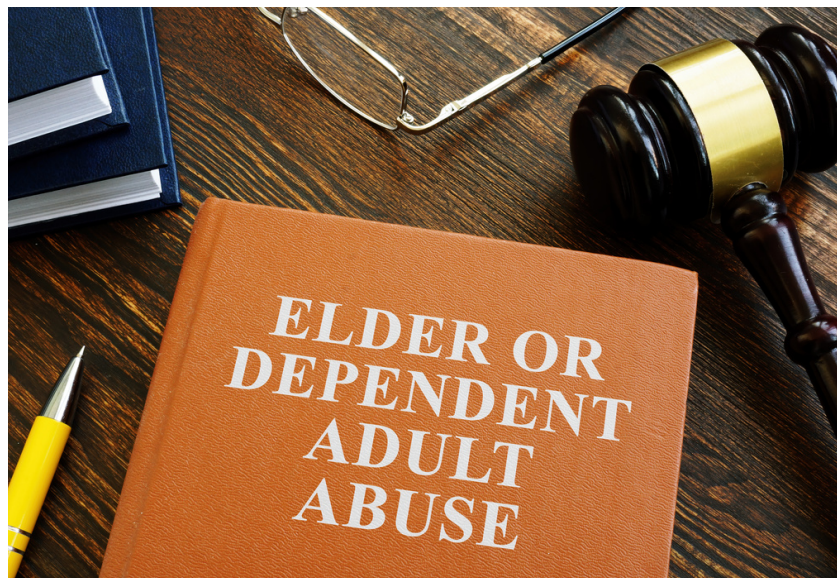
**B. Work with Resident Councils** (NORS Elements S-64 and S-65)

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

**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.

**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.

**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.



# Service Unit Plan (SUP)

Draft

## TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES CONTINUED

### Outcome 1 - Measure and Target Charts

#### LTC Ombudsman Outcome 1 - Measure A (Complaint Resolution)

Fiscal Year	Complaints Partially/Fully Resolved	Total Number of Complaints	Baseline Resolution Rate	Two Yr. Target Resolution Rate	Fiscal Yr. Target	Goal	Objective
2022-2023	1206	2692	41%	50%	2024-2025	1	1,2,3
2023-2024					2025-2026		
2024-2025					2026-2027		
2025-2026					2027-2028		

#### LTC Ombudsman Outcome 1 - Measures B-F FY 2022-2023 Baseline/2024-2025 Targets

Measure Name	Units	Baseline	2024-2025 Target	Goal	Objective
Work With Resident Councils	Council Meetings Attended	16	20	1	1,2,3
Work With Family Councils	Council Meetings Attended	5	1	1	1,2,3
Information and Assistance to Faculty Staff	Instances	1139	500	1	1,2,3
Information and Assistance to Individuals	Instances	1428	600	3	3.2
Community Education	Sessions	21	4	3	3.2



# Service Unit Plan (SUP)

Draft

**TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES CONTINUED**

**Outcome 1 - Measure and Target Charts**

**LTC Ombudsman Outcome 1 - Measures B-F  
FY 2023-2024 Baseline/2025-2026 Targets**

Measure Name	Units	Baseline	2025-2026 Target	Goal	Objective
Work With Resident Councils	Council Meetings Attended				
Work With Family Councils	Council Meetings Attended				
Information and Assistance to Faculty Staff	Instances				
Information and Assistance to Individuals	Instances				
Community Education	Sessions				

**LTC Ombudsman Outcome 1 - Measures B-F  
FY 2024-2025 Baseline/2026-2027 Targets**

Measure Name	Units	Baseline	2026-2027 Target	Goal	Objective
Work With Resident Councils	Council Meetings Attended				
Work With Family Councils	Council Meetings Attended				
Information and Assistance to Faculty Staff	Instances				
Information and Assistance to Individuals	Instances				
Community Education	Sessions				



# Service Unit Plan (SUP)

Draft

**TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN  
PROGRAM OUTCOMES CONTINUED**

**Outcome 1 - Measure and Target Charts**

**LTC Ombudsman Outcome 1 - Measures B-F  
FY 2025-2026 Baseline/2027-2028 Targets**

Measure Name	Units	Baseline	2027-2028 Target	Goal	Objective
Work With Resident Councils	Council Meetings Attended				
Work With Family Councils	Council Meetings Attended				
Information and Assistance to Faculty Staff	Instances				
Information and Assistance to Individuals	Instances				
Community Education	Sessions				





# Service Unit Plan (SUP)

Draft

## TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES CONTINUED

### Outcome 1 - Measures and Targets Continued:

#### 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.

#### FY 2024-2025

**FY 2024-2025 Systems Advocacy Effort(s):** The Wise & Healthy Aging Ombudsman Program will provide consultation, training, and/or resource materials to hospital discharge planners and social workers on a resident's rights to return to the nursing home or assisted living after acute hospitalization. The objective is to combat illegal eviction via patient/resident dumping at the acute hospitals and reduce transfer trauma.

# Service Unit Plan (SUP)

Draft

## TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES CONTINUED

### Outcome 1 - Measures and Targets Continued:

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

##### FY 2025-2026

Outcome of FY 2024-2025 Efforts:

FY 2025-2026 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)

##### FY 2026-2027

Outcome of FY 2025-2026 Efforts:

FY 2026-2027 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)

##### FY 2027-2028

Outcome of 2026-2027 Efforts:

FY 2027-2028 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)



# Service Unit Plan (SUP)

Draft

## TITLE IIIB & TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES CONTINUED

**Outcome 2. Residents have regular access to an Ombudsman. [(Older Americans Act Reauthorization Act of 2020), 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.

**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.

**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.

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

# Service Unit Plan (SUP)

Draft

**TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES CONTINUED**

**Outcome 2 - Measure and Target Charts**

**LTC Ombudsman Outcome 2 - Measures A-D  
FY 2022-2023 Baseline/2024-2025 Targets**

Measure Name	Measure	Units	Total Units	Baseline	2024-2025 Target
Routine Access: Nursing Facilities	Number of Facilities Visited Quarterly not in response to a complaint	54	57	95%	75%
Routine access: Residential Care Communities	Number of RCFEs Visited Quarterly not in response to a complaint	222	267	83%	65%
Number of Full-Time Equivalent (FTE) Staff	FTEs per FY	5.53	N/A	5.53	6
Number of Certified LTC Ombudsman Volunteers	Number of Certified Ombudsman Volunteers	2	N/A	2	2

**LTC Ombudsman Outcome 2 - Measures A-D  
FY 2023-2024 Baseline/2025-2026 Targets**

Measure Name	Units	Units	Total Units	Baseline	2025-2026 Target
Routine Access: Nursing Facilities	Number of Facilities Visited Quarterly not in response to a complaint				
Routine access: Residential Care Communities	Number of RCFEs Visited Quarterly not in response to a complaint				
Number of Full-Time Equivalent (FTE) Staff	FTEs per FY				
Number of Certified LTC Ombudsman Volunteers	Number of Certified Ombudsman Volunteers				



# Service Unit Plan (SUP)

Draft

**TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES CONTINUED**

**Outcome 2 - Measure and Target Charts**

**LTC Ombudsman Outcome 2 - Measures A-D  
FY 2024-2025 Baseline/2026-2027 Targets**

Measure Name	Units	Units	Total Units	Baseline	2026-2027 Target
Routine Access: Nursing Facilities	Number of Facilities Visited Quarterly not in response to a complaint				
Routine access: Residential Care Communities	Number of RCFEs Visited Quarterly not in response to a complaint				
Number of Full-Time Equivalent (FTE) Staff	FTEs per FY				
Number of Certified LTC Ombudsman Volunteers	Number of Certified Ombudsman Volunteers				

**LTC Ombudsman Outcome 2 - Measures A-D  
FY 2025-2026 Baseline/2027-2028 Targets**

Measure Name	Units	Units	Total Units	Baseline	2027-2028 Target
Routine Access: Nursing Facilities	Number of Facilities Visited Quarterly not in response to a complaint				
Routine access: Residential Care Communities	Number of RCFEs Visited Quarterly not in response to a complaint				
Number of Full-Time Equivalent (FTE) Staff	FTEs per FY				
Number of Certified LTC Ombudsman Volunteers	Number of Certified Ombudsman Volunteers				

## TITLE IIIB and TITLE VII: LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES CONTINUED

**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 2020, Section 712(c)]**

### **Measures and Targets:**

The following efforts Ombudsman program will undertake in the upcoming year to increase the accuracy, consistency, and timeliness of your National Ombudsman Reporting System (NORS) data reporting.

The Wise & Healthy Aging Ombudsman Program will do the following to improve accuracy and consistency in NORS data reporting:

1. All staff will be trained to enter data in real time into the Ombudsman Data Integration System (ODIN).
2. All staff will be trained on NORS coding, and documentation principles. All new Ombudsman staff and volunteers will be required to train on ODIN and NORS as part of the Ombudsman Certification training process.
3. Program Coordinator will conduct case reviews throughout each month to ensure accuracy and completeness of records and data collected.
4. Error trends will be identified and addressed through additional training, improvements in procedures, etc.



# Senior Centers and Focal Points



# Senior Centers and Focal Points

Draft

## COMMUNITY SENIOR CENTERS AND FOCAL POINTS LIST

Designated Community Focal Point	Address
Apple Valley Senior Club	13188 Central Road, Apple Valley, CA 92308
Ayala Park Community Center	17909 Marygold Avenue, Bloomington, CA 92316
Chemehuevi Indian Tribal Center	1990 Palo Verde Drive, Havasu Lake, CA 92363
Crest Forest Senior Citizens Club	24658 San Moritz Drive, Crestline, CA 92325
El Mirage Senior Club	1488 Milton Street, El Mirage, CA 92301
Fort Mohave Tribal Senior Nutrition Program	700 Harrison Street, Needles, CA 92363
Hesperia Leisure League	9122 Third Avenue, Hesperia, CA 92345
Helendale Community Services District	26540 Vista Road, Suite C, Helendale, CA 92342
Joshua Tree Community Center	6171 Sunburst Street, Joshua Tree, CA 92252
Larry Hutton Community Center	660 Colton Avenue, Colton, CA 92324
Lytle Creek Community Center	14082 Center Road, Lytle Creek, CA 92358 P.O. Box 182
Lytle Creek Community Center	380 South K Street, San Bernardino, CA 92410
Morongo Basin Senior Support Center	57121 Sunnyslope Drive, Yucca Valley, CA 92284
Newberry Springs Family Center	33383 Newberry Road, Newberry Springs, CA 92365
New Hope Family Center	1505 West Highland Avenue, San Bernardino, CA 92411
Percy Baker Community Center	9333 E Avenue, Hesperia, CA 92340 P.O. Box 104055
Phelan Senior Club	4128 Warbler Road, #A, Phelan, CA 92371
Pinon Hills Senior Club	10433 Mountain Road, Pinon Hills, CA 92372
Rudy Hernandez Community Center	222 North Lugo Avenue, San Bernardino, CA 92410
Wrightwood Community Center	1543 Barbara Street, Wrightwood, CA 92397





# Senior Centers and Focal Points

Draft

## COMMUNITY SENIOR CENTERS AND FOCAL POINTS LIST

Senior Center	Address
Barstow Senior Citizens Center	555 Melissa Avenue, Barstow, CA 92311
Big Bear Valley Senior Center	42651 Big Bear Boulevard, Big Bear Lake, CA 92315
Bonnie Baker Senior Citizens Center	149350 Ukiah Trail, Big River, CA 92242
Chino Senior Center	13170 Central Avenue, Chino, CA 91710
Delmann Heights Senior Center	2969 North Flores Street, San Bernardino, CA 92407
Dino Papavero Senior Center	16707 Marygold Avenue, Fontana, CA 92335
Fontana Community Senior Center	16710 Ceres Avenue, Fontana, CA 92335
George M. Gibson Senior Center	250 North Third Avenue, Upland, CA 91786
George White Senior Center	8565 Nuevo Avenue, Fontana, CA 92335
Grace Vargas Senior Center	1411 South Riverside Avenue, Rialto, CA 92376
Grand Terrace Senior Center	22627 Grand Terrace Road, Grand Terrace, CA 92313
Helendale Senior Center	15350 Riverview Road, Building 2, Helendale, CA 92342
Highland Senior Center	3102 East Highland Avenue, Highland, CA 92369
Hinkley Community and Senior Center	35997 Mountain View Road, Hinkley, CA 92347
James L. Brulte Senior Center	11200 Baseline Road, Rancho Cucamonga, CA 91701
Joslyn Senior Center	21 Grant Street, Redlands, CA 92373
Loma Linda Senior Center	25571 Barton Road, Loma Linda, CA 92354
Lucerne Valley Senior Center	10431 Allen Way, Lucerne Valley, CA 92356
Luque Senior Center	292 East O Street, Colton, CA 92324



# Senior Centers and Focal Points

Draft

## COMMUNITY SENIOR CENTERS AND FOCAL POINTS LIST CONTINUED

Senior Center	Address
Mentone Senior Center and Library	1331 Opal Avenue, Mentone, CA 92359
Montclair Senior Center	5111 Benito Street, Montclair, CA 91763
Mountain Communities Senior Center	675 Grandview Road, Twin Peaks, CA 92391
Needles Senior Center	1699 Bailey Avenue, Needles, CA 92363
Ontario Senior Center	225 East B Street, Ontario, CA 91764
Perris Hill Senior Center	780 East 21st Street, San Bernardino, CA 92404
Redlands Community Senior Center	111 West Lugonia Avenue, Redlands, CA 92374
San Bernardino 5th Street Senior Center	600 West 5th Street, San Bernardino, CA 92410
Trona Community Senior Center	13187 Market Street, Trona, CA 93562
Twentynine Palms Senior Center	6539 Adobe Road, Twentynine Palms, CA 92277
Victorville Senior Center	14874 Mojave Road, Victorville, CA 92392
Yucaipa Senior Center	12202 First Street, Yucaipa, CA 92399
Yucca Valley Senior Center	57088 Twentynine Palms Highway, Yucca Valley, CA 92284



Aging and Adult Services  
Public Guardian

# Draft

# Family Caregiver Support Program



# Family Caregiver Support Program

Draft

## FAMILY CAREGIVER SUPPORT PROGRAM (FCSP)

### Notice of Intent for Non-Provision of FCSP Multifaceted Systems of Support Services Older Americans Act Reauthorization Act of 2020, Section 373(a) and (b)

Based on the AAA’s needs assessment and subsequent review of current support needs and services for family caregivers, indicated below you will find what services the AAA intends to provide using Title III E and/or matching FCSP funds for both.

Family Caregiver Services Offered									
		FY 2024-2025		FY 2025-2026		FY 2026-2027		FY 2027-2028	
Category	Service	Direct	Contract	Direct	Contract	Direct	Contract	Direct	Contract
Caregiver Access	Case Management	Yes	Yes						
	Information and Assistance	Yes	Yes						
Caregiver Information Services	Information Services	Yes	Yes						
Caregiver Support	Training	No	Yes						
	Support Groups	No	Yes						
	Counseling	No	Yes						
Caregiver Respite	In-Home	No	Yes						
	Out-of-Home (Day)	No	Yes						
	Out-of-Home (Night)	No	Yes						
	Other:	No	Yes						
Caregiver Supplemental	Legal Consultation	No	Yes						
	Consumable Supplies	No	Yes						
	Home Modifications	No	Yes						
	Assistive Technology	No	No						
	Other (Assessment)	No	Yes						
	Other (Registry)	No	Yes						



# Family Caregiver Support Program

Draft

## FAMILY CAREGIVER SUPPORT PROGRAM (FCSP) CONTINUED

Older Relative Caregiver Services									
		FY 2024-2025		FY 2025-2026		FY 2026-2027		FY 2027-2028	
Category	Service	Direct	Contract	Direct	Contract	Direct	Contract	Direct	Contract
Caregiver Access	Case Management	No	No						
	Information and Assistance	Yes	No						
Caregiver Information Services	Information Services	Yes	No						
Caregiver Support	Training	No	No						
	Support Groups	No	No						
	Counseling	No	No						
Caregiver Respite	In-Home	No	No						
	Out-of-Home (Day)	No	No						
	Out-of-Home (Night)	No	No						
	Other:	No	No						
Caregiver Supplemental	Legal Consultation	No	Yes						
	Consumable Supplies	No	No						
	Home Modifications	No	Yes						
	Assistive Technology	No	No						
	Other (Assessment)	No	No						
	Other (Registry)	No	No						



# Family Caregiver Support Program

Draft

## FAMILY CAREGIVER SUPPORT PROGRAM (FCSP) CONTINUED

**Justification: For any of the five main categories that are NOT being provided,**

### **1. Provider name and address:**

San Bernardino County's Kinship Support Services Program (16519 Victor Street #404, Victorville, CA 92395)

### **2. Description of the service(s) they provide** (services should match those in the CDA Service Category and Data Dictionary):

Kinship Support Services Program is a collaborative between the Department of Children and Family Services (CFS) and not-for-profit organizations serving the Central, West End and High Desert regions of the County. The Kinship Support Services Program is funded by a combination of State, Federal and foundation grants. The Kinship Support Services Program helps strengthen families of individuals who are raising children of their extended family. The program provides a variety of support services to kinship families, ranging from great-grandmothers raising their great-grandchildren, to older siblings raising their brothers and sisters. Services are designed to combat the isolation, stress, and needs kinship families encounter in their day-to-day lives, and include support groups, parenting classes, informational workshops, caregiver respite, children's activities, and family recreation.

# Family Caregiver Support Program

Draft

## FAMILY CAREGIVER SUPPORT PROGRAM (FCSP) CONTINUED

**Justification: For any of the five main categories that are NOT being provided,**

### **3. Where is the service provided (entire PSA, certain counties)?**

There are three contracted services provided throughout the PSA 20 service area:

<b>Westside Kinship Support Services</b> (on the grounds of Westside Christian Center) 224 East 16th Street San Bernardino, CA 92404 (909) 889-5757	<b>Helping Hands Kinship Support Services</b> 316 East E Street Ontario, CA 91764 (909) 986-9710	<b>Helping Hands Kinship Support Services</b> 16519 Victor Street, Suite 404 Victorville, CA 92395 (760) 843-1177
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### **4. How does the AAA ensure that the service continues to be provided in the PSA without the use of Title III E funds?**

In order to prevent duplication, DAAS - PG determined that III E Older Relative Caregiver contracted services would not be provided beginning in fiscal year 14/15. No gap in services has been reported in the years III E Older Relative Caregiver contracted services have not been funded.

This agency is listed in our Information and Assistance Resource File as a non OAA community-based organization. The AAA updates the Information and Assistance (I&A) resource file annually. During this process, the AAA calls the agency to confirm information is still accurate and up to date.





Aging and Adult Services  
Public Guardian

# Draft

# Legal Assistance





## LEGAL ASSISTANCE

The Older Americans Act Reauthorization Act of 2020 designates legal assistance as a priority service under Title III B [42 USC §3026(a)(2)]. 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](https://aging.ca.gov/Providers_and_Partners/Legal_Services/#pp-gg)

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

- 35% of current budget has been allocated to legal services through approved IIIB funding.

### **2. How have your local needs changed in the past year(s)? Please identify any changes (include whether the change affected the level of funding and the difference in funding levels in the past four years).**

- As the community continues to recover from the effects of the pandemic, there has been a significant increase in older adults seeking assistance with Housing, Consumer and Health Law cases.

### **3. How does the AAA's contract/agreement with the Legal Services Provider(s) (LSPs) specify and ensure that the LSPs are expected to use the California Statewide Guidelines in the provision of OAA legal services?**

- The LSP California Statewide Guidelines in the provision of OAA legal services is used at Inland Counties Legal Services and staff training. Additionally, all staff take OAA Security Training.

## LEGAL ASSISTANCE CONTINUED

### **4. How does the AAA collaborate with the Legal Services Provider(s) to jointly establish specific priority issues for legal services? What are the top four (4) priority legal issues in your PSA?**

- In 2023 Inland Counties Legal Services provided free legal services to approximately 1,467 older adults in San Bernardino County through multiple funding sources.
  - Housing cases (comprised 56% of the cases closed) including private landlord/tenant, home ownership/real property, and mobile homes.
  - Consumer including collections/repossessions/deficiencies/garnishments and contracts/warranties.
  - Health Law including Medicaid, Medicare and home and community based care.
  - Miscellaneous, predominantly simple wills, advanced directives and powers of attorney.
  - Income Maintenance including Supplemental Security Income (SSI), Food Stamps and Social Security; Family including divorce; Employment; Individual Rights; and Juvenile including guardianships.
- Inland Counties Legal Services (ICLS) conducts local needs assessments communicating with, in part, actual and potential clients, public and private agencies, the courts, other legal services providers and various partner organizations. Annually the ICLS Board of Directors reviews and approves a list of priorities that have been derived from these assessments as well as feedback throughout the year.



**LEGAL  
ASSISTANCE**

## LEGAL ASSISTANCE CONTINUED

### 5. How does the AAA collaborate with the Legal Services Provider(s) to jointly identify the target population? What is the targeted senior population and mechanism for reaching targeted groups in your PSA?

- The legal services provider's priorities include targeted services to rural residents; frail elderly; persons with disabilities; tenants in eviction proceedings; persons seeking or at risk of losing public benefits; persons with cultural and/or language barriers; persons identifying with the LGBTQ+ community; black, indigenous and people of color (BIPOC); victims of domestic violence or trafficking seeking U Visa or Violence Against Women Act (VAWA) status; and unhoused persons.
- Older adults are specifically targeted with an emphasis on those in the greatest economic and social need with particular attention to low-income minority individuals, older individuals with Limited English Proficiency (LEP) and older individuals residing in rural and isolated areas.

### 6. How many legal assistance service providers are in your PSA?

Fiscal Year	# of Legal Assistance Services Providers	Did the number of service providers change? If so please explain
2024-2025	1	No
2025-2026		
2026-2027		
2027-2028		

## LEGAL ASSISTANCE CONTINUED

### 7. What methods of outreach are Legal Services Providers using?

- ICLS staff attend community/health/older adults' fairs, and annually targeted community legal education on various areas of law held at various senior apartment complexes and/or mobile home parks or other community settings.
- ICLS staff are available and seek opportunities to schedule specific presentations as requested with partner organizations who provide services to older adults or senior organizations on multiple legal topics that include but are not limited to, estate planning, mobile home law, health law (Covered California, etc.), and a multitude of other civil legal areas of law. These can be scheduled in-person or as Zoom meetings/presentations. All events include targeted legal information as well as general information about ICLS services that are available.

### 8. How many legal assistances service providers are in your PSA?

Fiscal Year	Name of Provider	Geographic Region Covered
2024-2025	a. Inland Counties Legal Services	a. San Bernardino County
2025-2026	a.	a.
	b.	b.
	c.	c.
2026-2027	a.	a.
	b.	b.
	c.	c.
2027-2028	a.	a.
	b.	b.
	c.	c.

## LEGAL ASSISTANCE CONTINUED

9. Discuss how older adults access Legal Services in your PSA and whether they can receive assistance remotely (e.g., virtual legal clinics, phone, U.S. Mail, etc.).

- **ICLS has seven distinct methods for conducting intakes:**

- In-person, video or telephonic interviews or appointments for eligibility and issue screening, and referral to the appropriate practice group (social distancing procedures are currently in place);
- Telephone calls to Intake Practice Group for eligibility and issue screening and then referral to the appropriate practice group;
- Referrals from the Housing Hotline;
- Health Consumer Alliance (HCA) Hotline for healthcare cases;
- In-person, video or telephonic appointments or interviews at outreach sites for eligibility and issue screening, and referral to the appropriate practice group;
- Applications submitted online available 24/7 on the ICLS website at [www.inlandlegal.org](http://www.inlandlegal.org). These applications are linked to the Legal Server case management system and reviewed daily; or
- ICLS is using the “Bookings” application on Microsoft 365 with our Veterans Legal Assistance Program (VLAP) partners as well as for Family Law Access Project (FLAP) to set appointments for applicant referral intakes.

- **Intake Screening:**

- ICLS screens all applicants for eligibility to ensure that cases are charged to appropriate fund sources that the applicant qualifies for. Income is screened to ensure that applicants under 60 years of age are at or below 200% of the Federal Poverty Level (FPL) guidelines annually adopted by the ICLS Board of Directors and applicants are also screened for age to ensure that qualified individuals aged 60 or older can receive free legal services.

## LEGAL ASSISTANCE CONTINUED

### • **Intake Screening Continued:**

- While Title IIIB Legal Services funding has no income or asset limit requirements, this information is gathered to ensure that when no Title III-B Legal Services funding is available services may continue being funded through other fund sources that do have income and asset limit requirements. ICLS' Legal Services Corporation (LSC) funding requires grantees to screen applicants seeking assistance to determine U.S. Citizenship or LSC approved non-U.S., citizen status. ICLS provides this screening to all applicants for services and only those with requisite status or qualification under VAWA exceptions can be served regardless of the funding source.

•

### **10. Identify the major types of legal issues that are handled by the Title IIIB legal provider(s) in your PSA (please include new legal problem trends in your area).**

- In 2023 ICLS provided free legal services to approximately 1,467 older adults in San Bernardino County through multiple fund sources. Fifty six percent (56%) of the cases were Housing (including private landlord/tenant; home ownership/real property; and mobile homes); followed by eleven percent (11%) Consumer (including collections/ repossessions/ deficiencies/garnishments and contracts/warranties); ten percent (10%), Health Law (including Medicaid, Medicare and home and community based care); and ten percent (10%) Miscellaneous (predominantly simple wills, advanced directives, and powers of attorney). The most recent trends are increases in housing, consumer, and health law cases.

### **11. What are the barriers to accessing legal assistance in your PSA? Include proposed strategies for overcoming such barriers.**

- The barriers to accessing legal assistance continue to include (1) the lack of public transportation in the more rural and remote parts of San Bernardino County; (2) the sheer geographical size of the county; and (3) the limited resources of legal assistance.

## LEGAL ASSISTANCE CONTINUED

### 12. What other organizations or groups does your legal service provider coordinate services with?

- ICLS coordinates services with the following organizations: San Bernardino County Department of Aging and Adult Services (DAAS - PG), Riverside County Office on Aging (OOA), Ombudsman, Adult Protective Services, California Advocates for Nursing Home Reform, and San Bernardino County Coordinated Intake System “2-1-1”.
  - **ICLS also coordinates services with:**
    - Legal Aid Society of San Diego (with California Department of Managed Health Care and federal funds for healthcare reform education and advocacy)
    - Internal Revenue Service Low Income Taxpayer Clinic (LITC) Grant
    - San Bernardino County Community Development and Housing Agency Housing and Disability Advocacy Program (HDAP) funds
    - Knowledge, Education for Your Success, Inc. (KEYS) Supportive Services for Veterans Families funds
    - California Department of Social Services Immigration Services Bureau Removal Defense Grant
    - California Department of Housing and Community Development Nonprofit Legal Services – Region 2 Mobile Home Residency Law Protection funds
    - REACH of the Valley California Governor’s Office of Emergency Services Victim Services Branch Grant
    - Kaiser California Community Foundation Capacity Building Program for Housing Related Services
    - Riverside Area Rape Crisis Center
    - Desert Sanctuary/Haley House
    - SAFE Family Justice Centers

**Older adults’ legal services are targeted for persons aged 60 and older who are in the “greatest social and economic need.”**



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# Disaster Preparedness





## DISASTER PREPARATION PLANNING

Conducted for the 2024-2028 Planning Cycle Older Americans Act Reauthorization Act of 2020, 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, policies, and procedures for emergency preparedness and response as required in OAA, Title III, Section 310**

- DAAS - PG is the AAA for San Bernardino County. The Department is part of the Human Services System and included in the County's comprehensive disaster preparation planning. San Bernardino County Fire Office of Emergency Services, as the Operational Area for the County, coordinates the development and implementation of the disaster plan. DAAS - PG Emergency Operations Plan describes the roles, responsibilities, and relationships of the Department consistent with the Standardized Emergency Management Systems (SEMS) and the National Incident Management System (NIMS), as they relate to disaster response.
- SEMS incorporates the use of the Incident Command System (ICS), the Master Mutual Aid Agreement, existing mutual aid systems, the operational area concept, and multiagency or inter-agency coordination. Local governments must use SEMS to be eligible for funding of their personnel related costs under state disaster assistance programs. At the field (incident) level, the use of SEMS standardizes the response to emergencies involving multiple jurisdictions or multiple agencies.
- The Incident Command System (ICS) is the basic emergency management system. ICS provides a common organizational framework within which agencies can work collectively at the scene of an emergency. ICS is also an effective emergency management system for either single or multiple agency use. DAAS - PG will activate the Department Emergency Operation Center (EOC) in the event of a disaster.

## DISASTER PREPARATION PLANNING CONTINUED

- The EOC will establish a system to receive and process task assignments, establish an outline of steps to secure the safety of department personnel, establish a system to provide the necessary resources as needed, ensure the continuing performance of the Department's essential operations/functions, and establish a plan of action for restoring normal day-to-day operations. Emergency response sections will be established in the EOC as described in the Emergency Operations Plan. In alignment with SEMS and NIMS, EOC staff have been designated to one of the following sections: Management, Operations, Planning, Logistics, and Finance. Critical functions have been identified below. Essential Disaster Response functions include:
  - Ensure all records, documents, critical supplies, and other items needed to perform critical functions are available offsite and/or can be readily obtained if the facility is lost.
  - Check on the most vulnerable clients from all programs.
  - Coordinate assistance to vulnerable clients with OES and first responders.
  - Provide disaster information in alternative languages as necessary.
  - Investigate APS reports.
- A decision-making process in disaster settings has been put in place to ensure that there is continuity of operations.
  - If the disaster is regional, the disaster plan will be implemented at the regional level. Communication may be from the bottom up. For a countywide disaster, the disaster plan is implemented by the Director, Assistant Director or successor, based on the lines of succession established in the plan. The Director oversees the relief efforts conducted by the Department. The Deputy Directors and District Managers provide information to the Director about each Region and financial concerns. The Deputy Directors supervise and coordinate relief efforts in their respective regions as well as specific activities based on respective assignments. The District Managers coordinate the establishment of emergency sites for provision of food/nutrition along with the assignment of Senior Information and Assistance staff to Senior Centers and nutrition sites. The Deputy Directors also coordinate efforts in their regions and maintain contact with regional supervisors. Authority for DAAS - PG operations is the responsibility of the highest-level employee.

# Disaster Preparedness

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## DISASTER PREPARATION PLANNING CONTINUED

2. 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
Daniel Munoz	Deputy Executive Officer	Office: 909-388-5807
Sherri Misener	HS Emergency Service Supervisor	Office: 909-387-8853

3. Identify the Disaster Response Coordinator within the AAA:

Name	Title	Telephone
David Quiroz	Deputy Director	Office: 909-891-3905 Cell: 909-697-5731

4. List critical services the AAA will continue to provide to the participants after a disaster and describe how these services will be delivered (i.e., Wellness Checks, Information, Nutrition programs):

Critical Services	How Delivered?
Check on most vulnerable clients	Program staff has disaster contact sheets used to document if the client has a live-in care provider or not, is on oxygen, is bed bound, etc. The most dependent clients are prioritized first in being contacted during a disaster. Older adults, adults with disabilities and their caregivers receiving any service through DAAS – PG will be contacted by phone to ensure their safety and needs are met.
Coordinate with first responders	Department Disaster Coordinators assigned to each facility conduct a self-assessment of the staff, visitors, and facility and report back to DOC.
Investigate Adult Protective Services reports	Deputy Directors supervise and coordinate relief efforts in their respective regions as well as specific activities based on their assignments.

# Disaster Preparedness

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## DISASTER PREPARATION PLANNING CONTINUED

**5. List critical services the AAA will provide to its operations after a disaster and describe how these services will be delivered (i.e., Cyber Attack, Fire at your building, Evacuation of site, Employee needs)**

Critical Services	How Delivered?
In-Home Supportive Services	Providers will continue to be paid, Social Work staff will continue to make contact and ensure service eligibility, and critical and urgent clients will be contacted directly and serviced as a priority.
Adult Protective Services	Received referrals will continue to be investigated/served. Existing cases will continue to be managed by Social Work staff. Critical and urgent cases will be serviced as a priority.
Senior Nutrition	Providers and DASS - PG will work together to ensure that healthy meals can continue to be provided to all in need and create an option to have food delivered to ensure safety amongst the most at - risk population.
Public Guardian	Deputy staff continue to make contact, provide welfare checks, and fully service conservatories, as a matter of legal obligation.
Age Wise	Behavioral Health Clinicians and Paraprofessionals ensure contact with program clients, providing welfare checks and the ongoing assessing of basic needs as well as mental well-being. The Age Wise 24/7 Senior Hotline is available via a toll free hotline to address urgent and critical community needs.

**6. List critical resources the AAA needs to continue operations.**

- Supplemental funding to allow the expansion of services through contracted providers and community entities to help support initiatives taking place during natural disasters.
- Collaboration with community interties to quickly disburse initiatives to help those greatly affected by the disasters at hand. Partnerships may include, but are not limited to, Sheriff, Fire Departments, Medical Staff, Meal and Nutrition sites, Public Health, additional County Departments, community partners and local businesses.

## DISASTER PREPARATION PLANNING CONTINUED

### 7. List any agencies or private/non-government organizations with which the AAA has formal or nonformal emergency preparation or response agreements. (contractual or MOU)

- California Fire Service and Rescue Emergency Mutual Aid System/Plan 4/2019
- Operations Bulletin #1 Closest Resource Concept-Requesting Mutual Aid from Adjoining Operational Areas and Regions
- California Disaster and Civil Defense Master Mutual Aid Agreement; Immediate Need Procedures AH-330 3-3 STL\_TFL Response 2018
- Multi-Agency Coordination System Publication Procedures Guide MACS 410-1 7/2018
- Multi-Agency Coordination System Resource Designation System MACS 410-2 5/2013
- California Fire Service and Rescue Emergency Mutual Aid System Orientation for the new Operational Area Coordinator 4/2019; ST-TF AH-330 3-3-3 Code of Conduct 7/2017

### 8. Describe how the AAA will:

- **Identify vulnerable populations:**
  - Each program identifies vulnerable service populations by keeping disaster contact sheets numbered according to the needs assessment and whether there is a live-in care provider available to assist. The highest priority clients are those who do not have live-in help and who are dependent on oxygen or other durable medical equipment.
- **Identify possible needs of the participants before a disaster event (PSPS, Flood, Earthquake, etc.):**
  - The population in need is already identified by the services that are accessed. This allows for DAAS - PG staff to quickly contact and initiate a response in the case of a disaster.
- **Follow up with vulnerable populations after a disaster event:**
  - DAAS - PG staff remain in touch with high priority clients during any disaster until the situation client needs are stabilized.

## DISASTER PREPARATION PLANNING CONTINUED

### 9. How is disaster preparedness training provided?

- **AAA to participants and caregivers**
- Social workers and Senior Information Assistance staff provide comprehensive information, resources and in-person training to caregivers to help ensure the older adults they assist are prepared.
- **To staff and subcontractors**
  - Subcontractors are encouraged and informed of all State and County disaster preparedness initiatives and exercises to help provide insight on how to best prepare for a disaster in their own location. Providers are given resources and information provided to internal staff on best practices in case of a disaster. This includes providing guides on how internal staff are assigned and trained with specific duties to ensure safety within the location and how to continue to provide assistance to the older adults serviced, who may be impacted by the disaster.



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# Notice of Intent to Provide Direct Services



# Notice of Intent to Provide Direct Services

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## CCR Article 3, Section 7320 (a)(b) and 42 USC Section 3027(a)(8)(C)

If a 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.
--	---

Direct Services Offered					
OAA Title	Service	FY 2024-2025	FY 2025-2026	FY 2026-2027	FY 2027-2028
Title IIIB	Information and Assistance				
	Case Management				
	Outreach				
	Program Development				
	Coordination				
	Long Term Care Ombudsman				
Title IIID	Health Promotion - Evidence Based				
Title IIIE	Caregiver Case Management				
	Caregiver Counseling				
	Caregiver Information and Assistance				
	Caregiver Information Services				
	Caregiver Respite In-Home				
	Caregiver Respite Other				
	Caregiver Respite Out-Of-Home Day care				
	Caregiver Respite Out-Of-Home Overnight Care				
	Caregiver Supplemental Service Assistive Technology				
	Caregiver Supplemental Service Caregiver Assessment				
	Caregiver Supplemental Service Consumable Supplies				





# Notice of Intent to Provide Direct Services

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## NOTICE OF INTENT TO PROVIDE SERVICES CONTINUED

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

Direct Services Offered					
OAA Title	Service	FY 2024-2025	FY 2025-2026	FY 2026-2027	FY 2027-2028
Title III E	Caregiver Supplemental Service Home Modifications				
	Caregiver Supplemental Service Legal Consultation				
	Caregiver Supplemental Service Caregiver Registry				
	Caregiver Support Groups				
	Caregiver Training				
	Title VII A	Long Term Care Ombudsman			
Title VII	Prevention of Elder Abuse, Neglect, and Exploitation				

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

The AAA maintains six Senior Information and Assistance (SIA) offices strategically located to serve the entire County where they distribute information about resources, and provide direct services in both Titles IIIB and IIIE. SIA staff are committed to identifying service gaps, assisting older adults in accessing resources, and following up on the provision of services in a timely manner. They perform outreach at locations which include but are not limited to: senior centers, nutrition sites, mobile home parks, older adult apartment complexes, food distribution sites, and health and resource fairs. SIA staff also attend community meetings and events where they make available information about services throughout the AAA. SIA outreach methods are particularly effective reaching remote and/or minority populations.

The AAA will continue to expand outreach efforts to create additional partnerships and collaborations to reach older adults, adults with disabilities, and their caregivers. Current objectives include enhancing transportation services, working with local Farmers’ Markets to make sure low-income older adults can use the Farmers’ Market check booklets throughout the County, and ensuring the success and effectiveness of the Scam Alert program.



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# Request for Approval to Provide Direct Services



# Request for Approval to Provide Direct Services

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

## Identify Service Category: Cash / Material Aid

OAA Title	Approval Requested
IIIB - Supportive Services	
IIIC-1 - Congregate Meals	
IIIC-2 - Home-Delivered Meals	
IIIE - Family Caregiver Support Program	
VII - Elder Abuse Prevention Program	
HICAP - Health Insurance Counseling & Advocacy Program	

## Request for Approval Justification

<input type="checkbox"/>	Necessary to Assure an Adequate Supply of Service <u>OR</u>
<input type="checkbox"/>	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 2024-2025	FY 2025-2026	FY 2026-2027	FY 2027-2028



# Request for Approval to Provide Direct Services

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**Provide: Documentation below that substantiates this request for direct delivery of the above stated service**

The AAA maintains six Senior Information and Assistance (SIA) offices strategically located to serve the entire San Bernardino County, to distribute information about resources, and provide direct services in both Titles IIIB and IIIE. SIA staff are committed to identifying service gaps, assisting older adults in accessing resources, and following up on the provision of services in a timely manner. SIA perform outreach efforts at senior centers, nutrition sites, mobile home parks, senior apartment complexes, food distribution sites, and health and resource fairs. SIA staff also attend community meetings and events where they make available information about services throughout the AAA.

SIA staff provides Cash/Material Aid services in the distribution of gas and grocery cards on a limited basis. A gas card cannot be counted as a one-way trip (Transportation unit of measure) but is more quantifiable as one assistance unit of measure. The County has existing staff, policies, procedures, and practices in place to administer this service in the most efficient and cost-effective manner. Successful similar programs include: Farmer's Market Coupons, Family Caregiver Supportive Services [food/merchandise gift cards], and Adult Protective Services [Tangibles]. Additionally, SIA staff provide utility assistance for older adults when there is a shut-off notice or where a disconnect has already occurred. This service is not on-going and occurs where extraordinary circumstances exist that are not likely to reoccur. In appropriate cases, SIA partners with other agencies to bundle services. SIA staff always encourages the client to pay part of a bill, and partners include but are not limited to Salvation Army, Community Action Partnership Home Energy Assistance Program, the Senior Disabled Fund's SAVE program, and other agencies to assist clients.



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# Governing Board Membership



# Governing Board Membership

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## GOVERNING BOARD MEMBERSHIP CCR Article 3, Section 7302(a)(11)

Total Number of Board Members: 5

Name and Title of Officers	Office Term Expires
Col. Paul Cook (Ret.) – Vice Chairman/First District Supervisor	December 2, 2024
Jesse Armendarez – Second District Supervisor	January 4, 2027
Dawn Rowe – Chair/Third District Supervisor	December 2, 2024
Curt Hagman – Fourth District Supervisor	January 4, 2027
Joe Baca, Jr. – Fifth District Supervisor	December 2, 2024

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

As Board members approach the end of their term, they have the opportunity (along with any other constituent) to be re-elected for their position at regularly scheduled elections.



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# Advisory Council



# Advisory Council

Draft

## ADVISORY COUNCIL MEMBERSHIP

**Older Americans Act Reauthorization Act of 2020 Section 306(a)(6)(D)  
45 CFR, Section 1321.57 CCR Article 3, Section 7302(a)(12)**

Total Council Membership (including vacancies): 21

Number and Percent of Council Members Over Age 60: 13 (86%)

Race/Ethnic Composition	% of PSA Population	% on Advisory Council
White	76%	74%
Hispanic	15%	20%
Black	9%	6%
Asian/Pacific Islander	0%	0%
Native American/Alaskan Native	0%	0%
Other	0%	0%

Name and Title of Officers	Office Term Expires
David Wilder, Chair	December 30, 2025
Penny Shubnell, Vice Chair	December 30, 2025
Anniebell Perry, SAC Secretary	December 30, 2025

Name and Title of Other Members	Office Term Expires
Susan Drake, First District Appointee	January 6, 2025
Louisa Ollague, Second District Appointee	January 1, 2027
Deborah Nattress, PhD, Third District Appointee	January 1, 2025
Judith K. Walsh, Third District Appointee	December 1, 2025
Keith G. Stroup, Fourth District Appointee	January 4, 2027
Anniebell Perry, Fifth District Appointee	January 1, 2025
Chelsea J. Lagrange, At Large Appointee	January 14, 2025
Craig Swanson, At Large Appointee	January 1, 2027
First District Appointee	VACANT
Second District Appointee	VACANT
Professional Appointee	VACANT



# Advisory Council

# Draft

## ADVISORY COUNCIL MEMBERSHIP CONTINUED

**Older Americans Act Reauthorization Act of 2020 Section 306(a)(6)(D)  
45 CFR, Section 1321.57 CCR Article 3, Section 7302(a)(12)**

<b>Name and Title of Other Members</b>	<b>Office Term Expires</b>
Judith K. Walsh, Third District Appointee	December 1, 2025
Keith G. Stroup, Fourth District Appointee	January 4, 2027
Anniebell Perry, Fifth District Appointee	January 1, 2025
Chelsea J. Lagrange, At Large Appointee	January 14, 2025
Craig Swanson, At Large Appointee	January 1, 2027
First District Appointee	VACANT
Second District Appointee	VACANT
Professional Appointee	VACANT
Professional Appointee	VACANT
David Wilder, Executive Committee Chair, East Valley Regional Council on Aging (RCA), and California Senior Senator	N/A RCA
Penny Shubnell, Executive Committee Vice Chair, Mountain RCA and Healthy Aging Chair	N/A RCA
Heather Lopez, Victor Valley RCA	N/A RCA
Stanley Przybocki, Morongo Basin RCA	N/A RCA
Gwen Alber, Nutrition Committee Chair, West Valley RCA	N/A RCA
North Desert RCA	VACANT
Colorado River RCA	VACANT
Suzanne Yoakum, California Senior Assembly Member, Fourth District Appointee	January 4, 2027
Maricela S. Ferguson, Legislative Committee Chair, Fifth District Appointee	December 2, 2024



**ADVISORY COUNCIL MEMBERSHIP CONTINUED**

**Older Americans Act Reauthorization Act of 2020 Section 306(a)(6)(D)  
45 CFR, Section 1321.57 CCR Article 3, Section 7302(a)(12)**

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

<b>Category</b>	<b>Yes</b>	<b>No</b>
Representative with a low income		
Representative with a disability		
Supportive services provider		
Health care provider		
Local elected official(s)		
Persons with leadership experience in private and voluntary sectors		
<b>Optional Category</b>	<b>Yes</b>	<b>No</b>
Family caregiver, including older relative caregiver		
Tribal representative		
LGBTQ representation		
Veteran Status		
Other		

**Explain any “No” answer(s):**

Only no selected are in the Optional section of the requested information, not members opted in providing this information.

**Explain what happens when term expires, for example, are the members permitted to remain in their positions until reappointments are secured? Have they been replaced, renewed or other?**

Once a term expires, individuals must re-apply to the position. All requests to be considered will be submitted to the Board of Supervisors for consideration and be appointed the position. Position can potentially be renewed based on the decision of the Board of Supervisors on who to appoint to each available vacancy.

## ADVISORY COUNCIL MEMBERSHIP CONTINUED

**Older Americans Act Reauthorization Act of 2020 Section 306(a)(6)(D)  
45 CFR, Section 1321.57 CCR Article 3, Section 7302(a)(12)**

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

### **APPOINTED MEMBERS**

Twelve Members are appointed by the Board of Supervisors: Two members from each supervisorial district and two members appointed at-large. The term of office of the appointed members shall be coterminous with the appointing supervisor; these shall be four-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 two-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 two commissioners having relevant professional experience in fields including but not limited to: gerontology, social work, education, and 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 one 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 the office of 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.

# Multipurpose Senior Center Acquisition or Construction Compliance Review



# Multipurpose Senior Center Acquisition or Construction Compliance Review

Draft

## CCR Title 22, Article 3, Section 7302(a)(15) 20-year tracking requirement

Tracked Item	Yes	No
Title IIIB Funds not used for Acquisition or Construction		

### Title III Grantee and/or Senior Center (complete the chart below):

Title III Grantee and/or Senior Center	Type Acq/Const	IIIB Funds Awarded	% Total Cost	Recapture Period Begin	Recapture Period End	Compliance Verification State Use Only
Name: Address:						



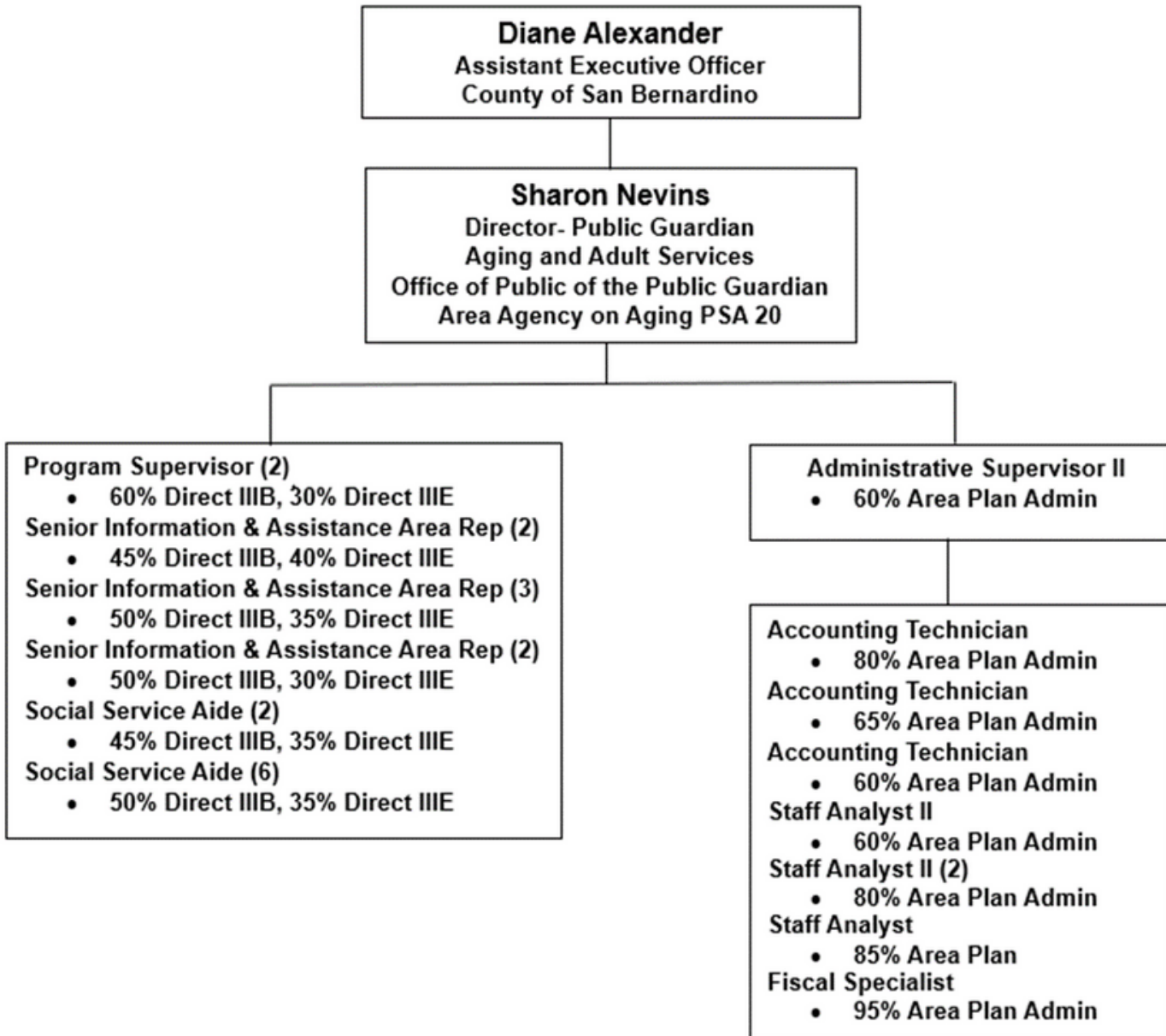
# Organization Chart



# Organization Chart

Draft

## PSA 20





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# Assurances





**Pursuant to the Older Americans Act Reauthorization Act of 2020, (OAA), the Area Agency on Aging assures that it will:**

## **A. Assurances**

### **• 1. OAA 306(a)(2)**

- Provide an adequate proportion, as required under Older Americans Act Reauthorization Act of 2020 Section 307(a)(2), of the amount allotted for part B to the Planning and Service Area will be expended for the delivery of each of the following categories of services -
  - A) Services associated with access to services (transportation, health services (including mental and behavioral health services) outreach, information and assistance, (which may include information and assistance to consumers on availability of services under part B and how to receive benefits under and participate in publicly supported programs for which the consumer may be eligible) and case management services).
  - B) In-home services, including supportive services for families of older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction.
  - C) Legal assistance; and assurances that the Area Agency on Aging will report annually to the State agency in detail the amount of funds expended for each such category during the fiscal year most recently concluded.

### **• 2. OAA 306(a)(4)(A)(i)(I-II)**

- (I) Provide assurances that the area agency on aging will -
  - (aa) Set specific objectives, consistent with State policy, for providing services to older individuals with greatest economic need, older individuals with greatest social need, and older individuals at risk for institutional placement.
  - (bb) Include specific objectives for providing services to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas; and;
  - (II) Include proposed methods to achieve the objectives described in (aa) and (bb) of subclause (I).

## Assurances Continued

- **3. OAA 306(a)(4)(A)(ii)**
  - Include in each agreement made with a provider of any service under this title, a requirement that such provider will -
    - (I) Specify how the provider intends to satisfy the service needs of low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in the area served by the provider.
    - (II) To the maximum extent feasible, provide services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in accordance with their need for such services.
    - (III) Meet specific objectives established by the Area Agency on Aging, for providing services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas within the planning and service area.
- **4. OAA 306(a)(4)(A)(iii)**
  - With respect to the fiscal year preceding the fiscal year for which such plan is prepared -
    - (I) Identify the number of low-income minority older individuals in the Planning and Service Area.
    - (II) Describe the methods used to satisfy the service needs of such minority older individuals.
    - (III) Provide information on the extent to which the Area Agency on Aging met the objectives described in Assurance number 2.
- **5. OAA 306(a)(4)(B)**
  - Use outreach efforts that -
    - (i) Identify individuals eligible for assistance under this Act, with special emphasis on -
      - (I) Older individuals residing in rural areas.
      - (II) Older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas).

## ASSURANCES CONTINUED

- (III) Older individuals with greatest social need (with particular attention to low income minority individuals and older individuals residing in rural areas);
- (IV) Older individuals with severe disabilities.
- (V) Older individuals with limited English proficiency.
- (VI) Older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals).
- (VII) Older individuals at risk for institutional placement, specifically including survivors of the Holocaust.
  - (ii) Inform the older individuals referred to in sub-clauses (I) through (VII) of clause (i) and the caretakers of such individuals, of the availability of such assistance.
- **6. OAA 306(a)(4)(C)**
  - Contain an assurance that the Area Agency on Aging will ensure that each activity undertaken by the agency, including planning, advocacy, and systems development, will include a focus on the needs of low-income minority older individuals and older individuals residing in rural areas.
- **7. OAA 306(a)(5)**
  - Provide assurances that the Area Agency on Aging will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with severe disabilities, and individuals at risk for institutional placement with agencies that develop or provide services for individuals with disabilities.
- **8. OAA 306(a)(6)(I)**
  - Describe the mechanism(s) for assuring that each Area Plan will include information detailing how the Area Agency on Aging will, to the extent feasible, coordinate with the State agency to disseminate information about the State assistive technology entity and access to assistive technology options for serving older individuals.
- **9. OAA 306(a)(9)(A)-(B)**
  - (A) Provide assurances that the Area Agency on Aging, in carrying out the State Long-Term Care Ombudsman program under 307(a)(9), will expend not less than the total amount of funds appropriated under this Act and expended by the agency in fiscal year 2019 in carrying out such a program under this title.

## ASSURANCES CONTINUED

- (B) Funds made available to the Area Agency on Aging pursuant to section 712 shall be used to supplement and not supplant other Federal, State, and local funds expended to support activities described in section 712.
- **10. OAA 306(a)(11)**
  - Provide information and assurances concerning services to older individuals who are Native Americans (referred to in this paragraph as “older Native Americans”), including -
    - (A) Information concerning whether there is a significant population of older Native Americans in the planning and service area and if so, an assurance that the area agency on aging will pursue activities, including outreach, to increase access of those older Native Americans to programs and benefits provided under this title.
    - (B) An assurance that the Area Agency on Aging will to the maximum extent practicable, coordinate the services the agency provides under this title with services provided under title VI.
    - (C) An assurance that the Area Agency on Aging will make services under the Area Plan available, to the same extent as such services are available to older individuals within the Planning and Service Area, to older Native Americans.
- **11. OAA 306(a)(13)(A-E)**
  - (A) Maintain the integrity and public purpose of services provided, and service providers, under this title in all contractual and commercial relationships.
  - (B) Disclose to the Assistant Secretary and the State agency -
    - (i) the identity of each nongovernmental entity with which such agency has a contract or commercial relationship relating to providing any service to older individuals.
    - (ii) The nature of such contract or such relationship.
  - (C) Demonstrate that a loss or diminution in the quantity or quality of the services provided, or to be provided, under this title by such agency has not resulted and will not result from such contract or such relationship.
  - (D) Demonstrate that the quantity or quality of the services to be provided under this title by such agency will be enhanced as a result of such contract or such relationship.

## ASSURANCES CONTINUED

- (E) On the request of the Assistant Secretary or the State, for the purpose of monitoring compliance with this Act (including conducting an audit), disclose all sources and expenditures of funds such agency receives or expends to provide services to older individuals.
- **12. OAA 306(a)(14)**
  - Provide assurances that preference in receiving services under this Title will not be given by the Area Agency on Aging to particular older individuals as a result of a contract or commercial relationship that is not carried out to implement this title.
- **13. OAA 306(a)(15)**
  - Provide assurances that funds received under this title will be used -
    - (A) To provide benefits and services to older individuals, giving priority to older individuals identified in Section 306(a)(4)(A)(i).
    - (B) In compliance with the assurances specified in Section 306(a)(13) and the limitations specified in Section 212.
- **14. OAA 305(c)(5)**
  - In the case of a State specified in subsection (b)(5), the State agency shall provide assurance, determined adequate by the State agency, that the Area Agency on Aging will have the ability to develop an area plan and to carry out, directly or through contractual or other arrangements, a program in accordance with the plan within the Planning and Service Area.
- **15. OAA 307(a)(7)(B)**
  - i. No individual (appointed or otherwise) involved in the designation of the State agency or an Area Agency on Aging, or in the designation of the head of any subdivision of the State agency or of an Area Agency on Aging, is subject to a conflict of interest prohibited under this Act.
  - ii. No officer, employee, or other representative of the State agency or an Area Agency on Aging is subject to a conflict of interest prohibited under this Act.
  - iii. Mechanisms are in place to identify and remove conflicts of interest prohibited under this Act.

## ASSURANCES CONTINUED

- **16.OAA 307(a)(11)(A)**
  - i. Enter into contracts with providers of legal assistance, which can demonstrate the experience or capacity to deliver legal assistance.
  - ii. Include in any such contract provisions to assure that any recipient of funds under division (i) will be subject to specific restrictions and regulations promulgated under the Legal Services Corporation Act (other than restrictions and regulations governing eligibility for legal assistance under such Act and governing membership of local governing boards) as determined appropriate by the Assistant Secretary.
  - iii. Attempt to involve the private bar in legal assistance activities authorized under this title, including groups within the private bar furnishing services to older individuals on a pro bono and reduced fee basis.
- **17.OAA 307(a)(11)(B)**
  - That no legal assistance will be furnished unless the grantee administers a program designed to provide legal assistance to older individuals with social or economic need and has agreed, if the grantee is not a Legal Services Corporation project grantee, to coordinate its services with existing Legal Services Corporation projects in the Planning and Service Area in order to concentrate the use of funds provided under this title on individuals with the greatest such need; and the Area Agency on Aging makes a finding, after assessment, pursuant to standards for service promulgated by the Assistant Secretary, that any grantee selected is the entity best able to provide the particular services.
- **18. OAA 307(a)(11)(D)**
  - To the extent practicable, that legal assistance furnished under the plan will be in addition to any legal assistance for older individuals being furnished with funds from sources other than this Act and that reasonable efforts will be made to maintain existing levels of legal assistance for older individuals.
- **19. OAA 307(a)(11)(E)**
  - Give priority to legal assistance related to income, health care, long-term care, nutrition, housing, utilities, protective services, defense of guardianship, abuse, neglect, and age discrimination.

## ASSURANCES CONTINUED

### • 20.OAA 307(a)(12)(A)

- Any Area Agency on Aging, in carrying out such services will conduct a program consistent with relevant State law and coordinated with existing State Adult Protective Service activities for -
  - i. Public education to identify and prevent abuse of older individuals.
  - ii. Receipt of reports of abuse of older individuals.
  - iii. Active participation of older individuals participating in programs under this Act through outreach, conferences, and referral of such individuals to other social service agencies or sources of assistance where appropriate and consented to by the parties to be referred.
  - iv. Referral of complaints to law enforcement or public protective service agencies where appropriate.

### • 21.OAA 307(a)(15)

- If a substantial number of the older individuals residing in any Planning and Service Area in the State are of limited English-speaking ability, then the State will require the Area Agency on Aging for each such planning and service area -
  - (A) To utilize in the delivery of outreach services under Section 306(a)(2)(A), the services of workers who are fluent in the language spoken by a predominant number of such older individuals who are of limited English-speaking ability.
  - (B) To designate an individual employed by the Area Agency on Aging, or available to such Area Agency on Aging on a full-time basis, whose responsibilities will include:
    - i. Taking such action as may be appropriate to assure that counseling assistance is made available to such older individuals who are of limited English-speaking ability in order to assist such older individuals in participating in programs and receiving assistance under this Act.
    - ii. Providing guidance to individuals engaged in the delivery of supportive services under the Area Plan involved to enable such individuals to be aware of cultural sensitivities and to take into account effective linguistic and cultural differences.

## ASSURANCES CONTINUED

- **22.OAA 307(a)(18)**
  - Conduct efforts to facilitate the coordination of community-based, long-term care services, pursuant to Section 306(a)(7), for older individuals who -
    - (A) Reside at home and are at risk of institutionalization because of limitations on their ability to function independently.
    - (B) Are patients in hospitals and are at risk of prolonged institutionalization.
    - (C) Are patients in long-term care facilities, but who can return to their homes if community-based services are provided to them.
- **23. OAA 307(a)(26)**
  - Area Agencies on Aging will provide, to the extent feasible, for the furnishing of services under this Act, consistent with self-directed care.

## **B. Code of Federal Regulations (CFR), Title 45 Requirements:**

- **24.CFR [1321.53(a)(b)]**
  - (a) The Older Americans Act intends that the Area Agency on Aging shall be the leader relative to all aging issues on behalf of all older persons in the Planning and Service Area. This means that the area agency shall proactively carry out, under the leadership and direction of the State agency, a wide range of functions related to advocacy, planning, coordination, inter-agency linkages, information sharing, brokering, monitoring and evaluation, designed to lead to the development or enhancement of comprehensive and coordinated community-based systems in, or serving, each community in the Planning and Service Area. These systems shall be designed to assist older persons in leading independent, meaningful and dignified lives in their own homes and communities as long as possible.
  - (B) A comprehensive and coordinated community-based system described in paragraph (a) of this section shall:
    - (1) Have a visible focal point of contact where anyone can go or call for help, information or referral on any aging issue.
    - (2) Provide a range of options.



## ASSURANCES CONTINUED

- (3) Assure that these options are readily accessible to all older persons: The independent, semi-dependent and totally dependent, no matter what their income.
  - (4) Include a commitment of public, private, voluntary and personal resources committed to supporting the system.
  - (5) Involve collaborative decision-making among public, private, voluntary, religious and fraternal organizations and older people in the community.
  - (6) Offer special help or targeted resources for the most vulnerable older persons, those in danger of losing their independence.
  - (7) Provide effective referral from agency to agency to assure that information or assistance is received, no matter how or where contact is made in the community;
  - (8) Evidence sufficient flexibility to respond with appropriate individualized assistance, especially for the vulnerable older person.
  - (9) Have a unique character which is tailored to the specific nature of the community.
  - (10) Be directed by leaders in the community who have the respect, capacity and authority necessary to convene all interested persons, assess needs, design solutions, track overall success, stimulate change and plan community responses for the present and for the future.
- **25. CFR [1321.53(c)]**
    - The resources made available to the Area Agency on Aging under the Older Americans Act are to be used to finance those activities necessary to achieve elements of a community-based system set forth in paragraph (b) of this section.
  - **26.CFR [1321.53(c)]**
    - Work with elected community officials in the planning and service area to designate one or more focal points on aging in each community, as appropriate.
  - **27.CFR [1321.53(c)]**
    - Assure that services financed under the Older Americans Act in, or on behalf of the community will be either based at, linked to or coordinated with the focal points designated.

## ASSURANCES CONTINUED

- **28. CFR [1321.53(c)]**
  - Assure access from designated focal points to services financed under the Older Americans Act.
  
- **29. CFR [1321.53(c)]**
  - Work with, or work to assure that community leadership works with, other applicable agencies and institutions in the community to achieve maximum collocation at, coordination with or access to other services and opportunities for the elderly from the designated community focal points.
  
- **30. CFR [1321.61(b)(4)]**
  - Consult with and support the State's long-term care ombudsman program.
  
- **31. CFR [1321.61(d)]**
  - No requirement in this section shall be deemed to supersede a prohibition contained in the Federal appropriation on the use of Federal funds to lobby the Congress; or the lobbying provision applicable to private nonprofit agencies and organizations contained in OMB Circular A-122.
  
- **32. CFR [1321.69(a)]**
  - Persons age 60 and older who are frail, homebound by reason of illness or incapacitating disability, or otherwise isolated, shall be given priority in the delivery of services under this part.