

# FY 2024-28 Four Year Area Plan

**UPDATE**

May 2026



Napa/Solano Area  
Agency on Aging PSA 28



**AREA AGENCY ON AGING**  
*assistance ▶ advocacy ▶ answers*



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## 2024-2028 4-YEAR AREA PLAN REQUIRED COMPONENTS CHECKLIST

To ensure all required components are included, "X" mark the far-right column boxes.  
Enclose a copy of the checklist with your Area Plan *submit this form with the Area Plan due 5-1-24 only.*

| Section | Four-Year Area Plan Components   | 4-Year Plan |
|---------|--|-------------|
| TL      | Transmittal Letter – <i>Can be electronically signed and verified, email signed letter or pdf copy of original signed letter can be sent to <a href="mailto:areaplan@aging.ca.gov">areaplan@aging.ca.gov</a></i> | X           |
| 1       | Mission Statement  | X           |
| 2       | Description of the Planning and Service Area (PSA)   | X           |
| 3       | Description of the Area Agency on Aging (AAA)  | X           |
| 4       | Planning Process & Establishing Priorities & Identification of Priorities  | X           |
| 5       | Needs Assessment & Targeting   | X           |
| 6       | Priority Services & Public Hearings  | X           |
| 7       | Area Plan Narrative Goals and Objectives:  | X           |
| 7       | Title IIIB Funded Program Development (PD) Objectives  | X           |
| 7       | Title IIIB Funded Coordination (C) Objectives  | X           |
| 7       | System-Building and Administrative Goals & Objectives  | X           |
| 8       | Service Unit Plan (SUP) and Long-Term Care Ombudsman Outcomes  | X           |
| 9       | Senior Centers and Focal Points  | X           |
| 10      | Title III E Family Caregiver Support Program   | X           |
| 11      | Legal Assistance   | X           |
| 12      | Disaster Preparedness  | X           |
| 13      | Notice of Intent to Provide Direct Services  | X           |
| 14      | Request for Approval to Provide Direct Services  | X           |
| 15      | Governing Board  | X           |
| 16      | Advisory Council   | X           |
| 17      | Multipurpose Senior Center Acquisition or Construction Compliance  | X           |
| 18      | Organization Chart   | X           |
| 19      | Assurances   | X           |

## AREA PLAN UPDATE (APU) CHECKLIST

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

*Use for APUs only due May 1, 2025, 2026, and 2027*

| AP Guidance Section | Required Annual Update Sections  | Check Updated            |
|---------------------|--|--------------------------|
| n/a                 | <b>A) Transmittal Letter</b> - (submit by email with electronic or scanned original signatures)  | <input type="checkbox"/> |
| n/a                 | <b>B) APU-</b> (submit entire APU electronically only)   | <input type="checkbox"/> |
| 2, 3, or 4          | <b>C) Estimate-</b> of the number of lower income minority older individuals in the PSA for the coming year                                  | <input type="checkbox"/> |
| 6                   | <b>D) Priority Services and Public Hearings</b>  | <input type="checkbox"/> |
| n/a                 | <b>E) Annual Area Plan Budget</b> (send to finance@aging.ca.gov)   | <input type="checkbox"/> |
| 8                   | <b>F) Service Unit Plan (SUP) and LTC Ombudsman Program Outcomes</b>   | <input type="checkbox"/> |
| 10                  | <b>G) Title III E Family Caregiver Support Program</b>   | <input type="checkbox"/> |
| 11                  | <b>H) Legal Assistance</b> (Revised 2026)  | <input type="checkbox"/> |
| AP Guidance Section | If there has been a change to another section, check the "Mark Changed" box AND include the "AAA Area Plan Summary of Changes" Attachment A: | Mark Changed             |
| 1                   | Mission Statement  | <input type="checkbox"/> |
| 5                   | Needs Assessment/Targeting   | <input type="checkbox"/> |
| 7                   | AP Narrative Objectives:   | <input type="checkbox"/> |
| 7                   | • System-Building and Administration   | <input type="checkbox"/> |
| 7                   | • Title IIIB-Funded Programs   | <input type="checkbox"/> |
| 7                   | • Title IIIB-Program Development/Coordination (PD or C)  | <input type="checkbox"/> |
| 7                   | • Title IIIC-1 or Title IIIC-2   | <input type="checkbox"/> |
| 7                   | • Title IIID-Evidence Based  | <input type="checkbox"/> |
| 7                   | • HICAP Program  | <input type="checkbox"/> |
| 9                   | Senior Centers and Focal Points  | <input type="checkbox"/> |
| 10                  | Title IIIE-Family Caregiver Support Program  | <input type="checkbox"/> |
| 12                  | Disaster Preparedness  | <input type="checkbox"/> |
| 13                  | Notice of Intent to Provide Direct Services  | <input type="checkbox"/> |
| 14                  | Request for Approval to Provide Direct Services  | <input type="checkbox"/> |
| 15                  | Governing Board  | <input type="checkbox"/> |
| 16                  | Advisory Council   | <input type="checkbox"/> |
| 17                  | Multipurpose Senior Center Acquisition or Construction   | <input type="checkbox"/> |
| 18                  | Organizational Chart(s) (Must match Budget)  | <input type="checkbox"/> |
| 19                  | Assurances   | <input type="checkbox"/> |
| <b>Atch. A</b>      | AAA Area Plan Summary of Changes   | <input type="checkbox"/> |
| <b>Atch. B</b>      | OCA Modernization Supplemental Summary   | <input type="checkbox"/> |
| <b>Atch. C</b>      | Local Master Plan for Aging Supplemental Summary   | <input type="checkbox"/> |

## TRANSMITTAL LETTER

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

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

AAA Name: Napa/Solano Area Agency on Aging

PSA 28

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

*Joelle Gallagher*

Joelle Gallagher (Apr 30, 2026 11:10:57 PDT)

Signature: Joelle Gallagher, Governing Board Chair <sup>1</sup>

\_\_\_\_\_ Date

*Riitta DeAnda*

Riitta DeAnda (Apr 27, 2026 22:18:31 PDT)

Signature: Riitta DeAnda, Advisory Council Chair

\_\_\_\_\_ Date

*Gwendolyn Gill*

Signature: Gwendolyn Gill, Interim Area Agency Aging Director

\_\_\_\_\_ Date

<sup>1</sup> Original signatures or electronic signatures are required.

## **SECTION 1. MISSION STATEMENT**

**Area Agencies on Aging:** 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.

**N/S AAA:** The mission of the Napa/Solano Area Agency on Aging is to advocate for and enhance the quality of life, health, independence, and dignity of older adults in Napa and Solano counties.

The N/S AAA mission statement was approved by the Oversight Board. The mission statement reflects the values and priorities of the Napa/Solano Area Agency on Aging.

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## **SECTION 2. DESCRIPTION OF THE PLANNING AND SERVICE AREA (PSA)**

### ***Demographics***

PSA 28 is comprised of two counties, Napa and Solano. The two-county PSA has a total area of 1,570 square miles with 12 cities and the remainder being rural, unincorporated areas that include vineyards, farmland and industrial areas. For funding allocations, the following demographics are used.

| <b>Total PSA Older Adult Population 60+</b> | <b>155,012</b><br><i>(California Department of Aging, 2/2024)</i> | <b>153,259</b><br><i>(CDA 2/2025)</i> | <b>156,096</b><br><i>(CDA 2026)</i> |
|---|---|---------------------------------------|-------------------------------------|
| Napa  | 41,780  | 40,949                                | 41,359                              |
| Solano                                      | 113,232   | 112,310                               | 114,737                             |

### **Napa County**

- Napa County is bordered by Solano County to the south and Sonoma County to the west. It is adjacent to Lake and Yolo Counties to the north.
- Total population 138,091(2020 Decennial Census [data.census.gov](https://data.census.gov))
- The percentage of the total population over 60 years old in Napa County is 32%
- The county has 5 cities; the city of Napa is the largest.
- Approximately 20% of the total county population live in unincorporated/rural areas.
- There are 1,000 residents living at Yountville Veterans home.

### **Solano County**

- Solano County is bordered by Napa County to the North, Yolo County to the North and East, and Sacramento County to the east. It is adjacent to Contra Costa County to the south and West.
- Total population 453,491 (2020 Decennial Census [data.census.gov](https://data.census.gov))
- The percentage of the total population over 60 years old in Solano County is 24%.
- The county has 7 cities; the city of Vallejo is the largest.
- Approximately 4% of the total county population live in unincorporated/rural areas.
- Solano County also has an active military base, Travis Air Force Base. This contributes to a significant number of military veterans living in Solano County.

| <b>Napa/Solano Older Adult Population Data</b> |               |             |              |
|--|---------------|-------------|--------------|
|  | <b>SOLANO</b> | <b>NAPA</b> | <b>TOTAL</b> |
| <b>Population 60+</b>                          |               |             |              |
| 2020   | 106,750       | 39,017      | 145,767      |
| 2040   | 132,692       | 43,819      | 176,511      |
| <b>Population under 18</b>                     |               |             |              |
| <b>2020</b>                                    | 97,769        | 28,879      | 126,648      |
| White  | 48%           | 72%         |              |
| Black  | 13%           | 2%          |              |
| Latino   | 15%           | 15%         |              |
| Asian  | 22%           | 9%          |              |
| <b>2040</b>                                    | 92,583        | 23,389      | 115,972      |
| White  | 42%           | 63%         |              |
| Black  | 14%           | 2%          |              |
| Latino   | 22%           | 25%         |              |
| Asian  | 21%           | 9%          |              |

Source: American Community Survey 2022

| <b>Poverty Adults 60+</b>                 | <b>SOLANO</b> | <b>NAPA</b> |
|---|---------------|-------------|
| 2019                                      | 7.6%          | 8.8%        |
| 2021                                      | 7.8%          | 7.3%        |
| 2022                                      | 9.5%          | 9.2%        |
| 2024                                      | 9.3%          | 6.0%        |
| American Indian or Alaska Native          | 11.3%         | n/a         |
| Asian                                     | 5.4%          | 5.7%        |
| Black or African American                 | 16.7%         | n/a         |
| Latino                                    | 10.3%         | 12.2%       |
| Native Hawaiian or other Pacific Islander | 11.6%         | n/a         |
| White                                     | 6.9%          | 5.8%        |
| <b>2020</b>                               |               |             |
| White                                     | 48%           | 72%         |
| Black                                     | 13%           | 2%          |
| Latino                                    | 15%           | 15%         |
| Asian                                     | 22%           | 9%          |
| <b>2040</b>                               |               |             |

|             |     |     |
|-------------|-----|-----|
| White       | 42% | 63% |
| Black       | 14% | 2%  |
| Latino      | 22% | 25% |
| Asian       | 21% | 9%  |
| <b>2060</b> |     |     |
| White       | 37% | 55% |
| Black       | 15% | 2%  |
| Latino      | 26% | 33% |
| Asian       | 20% | 1%  |

Source: American Community Survey 2022 & 2026

- In both counties, over 9% of older adults live below the federal poverty line (2024: \$15,060 for a single person; \$20,440 for a household of 2 people).
  - Update: In both counties, over 10% of older adults live below the federal poverty line (2026: \$15,060 for a single person; \$21,150 for a household of 2 people).
- According to the Elder Economic Security Index (2015), a Napa resident single-renter would require \$24,780 in annual income and a similar Solano resident would require \$23,244 in order to meet their monthly living expenses including rent, transportation, healthcare, food and other miscellaneous expenses.
  - Update: According to the Elder Economic Security Index (2025), a Napa resident single-renter would require \$39,828 in annual income and a similar Solano resident would require \$35,940 in order to meet their monthly living expenses including rent, transportation, healthcare, food and other miscellaneous expenses.

### **Resources and Constraints**

As described above, Napa and Solano counties share similar resources while having some profoundly different characteristics. Napa has a higher percentage of older adults. Solano is more diverse. Both counties will experience increased population growth among people 60 and older and corresponding decreases in younger populations, especially children under 18.

The Community Assessment Survey of Older Adults (CASOA) survey results indicate that in the PSA, the largest challenges are in the areas of housing, physical health, and information about older adult services.

### **Service System**

The N/S AAA contracts with local service providers for Older Americans Act services and other funded programs through a network of community-based providers. Funding allocations for contracted services are based on the percentage of the population of older adults in each of the two counties. The Joint Exercise of Powers Agreement (JEPA) between Napa County and Solano County states as part of the annual budget approval process the parties shall consult and change, if necessary, the percentages for each subsequent fiscal year.

- FY 24-25: the California Department of Aging intrastate funding formula of February 2024 determined the funding for Napa County contracts at 26.95% and Solano County contracts at 73.05% of the total AAA funding.
- FY 25-26: the California Department of Aging intrastate funding formula of February 2025 determined the funding for Napa County contracts at 26.72% and Solano County contracts at 73.28% of the total AAA funding.
- FY 26-27: the California Department of Aging intrastate funding formula of February 2026 determined the funding for Napa County contracts at 26.50% and Solano County contracts at 73.50% of the total AAA funding.
- The N/S AAA oversees two separate Long-Term Care Ombudsman programs – one for Napa County and one for Solano County. Programs are separate and are administered by different nonprofit agencies.
- Service providers are selected through a Request for Proposal (RFP) process conducted by Solano County procurement staff.
  - The RFP review and scoring are governed by the County of Solano procurement guidelines requiring subject matter experts from outside the county as raters.
  - AAA Staff present funding recommendations to the ACOA.
  - The ACOA recommendations are provided to the Oversight Board for final funding approval.

### **Local System Development**

The AAA is located in the Solano County Health and Social Services Agency Public Health Older and Disabled Adults bureau. In Home Supportive Services (IHSS), Adult Protective Services (APS), the IHSS Public Authority, and the Public Guardian are all programs provided to the community along with the AAA. The AAA Executive Director attends Health and Social Services management and staff meetings and collaborates with other County program staff and Board of Supervisors members. The AAA Executive Director meets periodically for planning and coordination with the Napa County Director of Health and Human Services as well as meetings with management staff from Comprehensive Services for Older Adults programs.

### **Challenges:**

- The AAA continues to look for opportunities for advocacy and collaboration with local initiatives that will expand services to older adults, people with disabilities and their caregivers.
- Service providers have struggled with funding and staffing shortages.
- Solano County is the most ethnically diverse county in the San Francisco Bay Area, making it challenging to reach all persons.
- Solano County is one of the poorest and least philanthropic counties in the San Francisco Bay Area, resulting in greater needs and fewer nonprofit funding resources.

- The AAA faces staffing challenges due to increased programming, fiscal, and monitoring requirements.

### **Successes:**

- The N/S AAA continued assisting service providers in reopening sites after COVID-19 shutdowns. Many congregate meal participants were reluctant to return to congregate settings. Likewise, Volunteer Visiting programs were slow to transition from phone calls to in-person visits, as volunteers who are older, and clients were reluctant to resume in-person visits. Evidence-based exercise programs successfully transitioned to in-person. Volunteer transportation services continued delivering groceries to homebound seniors and regular transportation services to healthcare appointments resumed.
- “Designation” status was awarded to the Aging and Disability Resource Connection (ADRC) of Solano. The ADRC is a joint program with the Independent Living Resource Center of Solano and Contra Costa Counties. ADRC Solano served over 600 individuals in the first two months of operation.
- The N/S AAA printed new Senior Resource Guides in English and Spanish. Guides were made available to County staff to give to clients, sent to senior centers and AAA service providers, and low-income senior living facilities.
- The pilot Line Dance curriculum for the CalFresh Healthy Living program (SNAP-Ed), which the N/S AAA was asked to create, was accepted by the California Department of Aging. The new evidence-based curriculum includes instructor materials, videos and class handouts. Program materials are now available and being used state-wide.
- N/S AAA distributed 1,700 iPads with 12-months of AT&T internet service, as well as funds to train older adults in how to use the devices. In Solano County, iPads were given out through the new Aging and Disability Resource Connection to introduce the community to the ADRC.
- Advisory Council to the N/S AAA took on a more active role in community outreach by attending three separate community tabling events, giving out resource materials and explaining how to connect with services.
- AAA staff held statewide leadership and advocacy positions with ADRC, CDA and C4A.
- ACOA conducted a four-month study of the congregate dining programs in both Napa and Solano Counties and presented their findings and suggested next steps to the Oversight Board.

### **Update 2025:**

- Solano Master Plan for Aging and Disability
  - Through the Local Aging and Disability Planning Grant, MPAD formed an Advisory Committee and held public hearings to assess local needs and priorities. The final report, including local data analysis and projections, will be presented to the Board of Supervisors and the community in May 2025. The Solano Master Plan for Aging

and Disability was developed by reviewing and analyzing community assessment data, engaging with the community, and gathering input from stakeholders. The plan will serve as a blueprint to prepare for the upcoming demographic changes, aiming to create a community where people of all ages and abilities are engaged, valued, and provided with equitable opportunities to thrive as they age, how and where they choose. Moreover, the Solano MPAD aims to introduce innovative partnerships, policies, and programs to empower older adults and people with disabilities, and caregivers. (MPAD report 2025)

- Napa County Emerging ADRC
  - Connections Napa County was designated an Emerging ADRC through the collaborative work of the AAA, Disability and Legal Services (ILC) and Providence Community Health Napa Valley.
- Solano ADRC
  - Solano ADRC expanded service delivery to include Information and Assistance. Solano ADRC continues to increase outreach and service provision to Solano County.

#### **Update 2026:**

- Funding for Cal Fresh Healty Living
  - It ended April 30, 2026, due to loss of Supplemental Nutrition Assistance Program-Education funding.
- Connections Napa County (ADRC)
  - Now providing ADRC services to Napa County. Collaboration continues with the N/S AAA, Disability Services & Legal Center and Providence Community Health Napa Valley.
- Emergency Backpacks Distribution
  - Purchased and distributed nearly 200 emergency packs in Solano County to various service providers for community resident distribution These emergency packs contain resources such as water, nonperishable food, flashlight etc. to enable a person or household to shelter in place in an emergency.
- Solano Master Plan for Aging and Disability
  - Held a launch meeting in October 2025 with California Department of Aging Director Susan DeMarois as the keynote speaker. Community meetings are being held monthly. Distributed Master Plan on Aging booklets to elected officials and community residents.
- Solano ADRC
  - Solano ADRC has rolled out information kiosks in 16 locations, including senior centers, transportation lobbies and soon to include Travis Air Force Base.

- Senior Resource Guides
  - The N/S AAA printed new Senior Resource Guides in English and Spanish. Guides will be distributed to Napa Connections and Solano ADRC; County staff to give to clients; senior centers; AAA service providers, and low-income senior living facilities.
- Senior Farmers Market Nutrition Program
  - Distributed 550 debit cards to give out in both Napa and Solano County Farmers Markets to low-income seniors through the Food Bank of Contra Costa and Solano and Community Action Napa Valley
- N/S AAA Change in Services
  - Cal-Fresh Outreach and CalFresh Health Living Contracts expired, and programs such as Line Dance programs, community gardens, and other programs were cancelled in both Napa and Solano Counties.
- N/S AAA Service Provider Orientations
  - Held two service provider orientations in Solano and Napa to promote support, collaboration with other service providers and N/S AAA team members and celebration of our service providers. N/S AAA fiscal and program staff shared information and answered questions.

Funding for Fall Prevention ended March 30, 2026.

| <b>N/S AAA Funded Categories and Programs</b> |  |                 |
|---|--|-----------------|
| <b>Title IIIB – Supportive Services</b>       |  |                 |
| <b>Service Type</b>                           | <b>Service Details</b>   | <b>Location</b> |
| Case Management                               | Short-term assistance and follow-up  | Napa and Solano |
| Cash/Material Aid                             | Housing support and health care  | Napa and Solano |
| Disaster Preparedness                         | Emergency resources  | Napa and Solano |
| Home Modification                             | Fall Prevention  | Napa and Solano |
| Information and Assistance                    | Short-term service coordination via telephone, walk-in, Solanocares4seniors.org; SolanoScamCenter.org. Connectionsnapacounty.org Aaans.org Printed resource guides in English and Spanish and available on the aaans.org website | Napa and Solano |
| Legal Services                                | Legal consultation and representation for housing and  | Napa and Solano |

|  |   |                 |
|--|---|-----------------|
|  | other legal issues  |                 |
| Outreach   | Outreach to the LGBTQI and adults with disabilities re: services to seniors   | Napa and Solano |
| Peer Counseling                                      | Counseling support to LGBTQI vulnerable elders  | Solano          |
| Senior Meal Boxes                                    | Shelf stable foods, fresh produce   | Solano          |
| Telephone Reassurance Programs                       | Regular phone contact to support vulnerable elders  | Napa and Solano |
| Transportation                                       | Volunteer Driver  | Napa and Solano |
|  | Voucher program   | Napa            |
| <b>Title IIIC -Senior Nutrition</b>                  |   |                 |
| Congregate Meals                                     | Hot meals served in a congregate setting  | Napa and Solano |
| Home-Delivered Meals                                 | Meals delivered to vulnerable elders at home.   | Napa and Solano |
| Nutrition Education                                  | Education to increase nutritional awareness   | Napa and Solano |
| <b>Title IIID - Health Promotion</b>                 |   |                 |
| Fall Prevention                                      | Evidence-based health promotion/disease prevention programs approved by the CDC<br>Exercise for Arthritis<br>Matter of Balance<br>Bingocize | Napa and Solano |
|  | Community Education about falls and fall prevention   | Napa and Solano |
| <b>Title IIIE - Family Caregiver Support Program</b> |   |                 |
| Alzheimer's Support                                  | Support to family caregivers  | Solano          |
| Caregiver Resources                                  | Information and referrals for family caregivers   | Napa and Solano |
| Other Elderly Relative                               | Information and referrals for other elderly relative caregivers   | Solano          |
| Respite  | Respite care for vulnerable elders to support family caregivers   | Napa and Solano |
| <b>Title VII- Elder Abuse Prevention</b>             |   |                 |
| Community Education                                  | Informational materials and community meetings to   | Napa and Solano |

|   |  |                                       |
|---|--|---------------------------------------|
|   | recognize and prevent elder abuse  |                                       |
| <b>HICAP – Health Insurance Counseling and Advocacy Program</b>   |  |                                       |
| Memorandum of Agreement with Sonoma County AAA serving as the lead agency for Sonoma, Marin AAA, Mendocino/Lake AAA, and Napa/Solano AAA. The AAA contracted with the Solano ADRC to provide MIPPA (Medicare Improvements for Patients and Providers) outreach for the HICAP program. |  |                                       |
| <b>Long-Term Care Ombudsman</b>   |  |                                       |
| Ombudsman Services  | Support for residents of licensed facilities   | Napa and Solano                       |
| <b>Cal-Fresh</b>  |  |                                       |
| Cal-Fresh Healthy Living**  | Evidence-based exercise classes  | Napa and Solano                       |
|   | Nutrition education  | Napa and Solano                       |
|   | Systems change interventions   | Napa and Solano                       |
| Cal-Fresh Outreach  | Benefits for older adults  | Napa and Solano                       |
| <b>Aging and Disability Resource Connection</b>   |  |                                       |
| ADRC Solano<br>Napa Connections   | Enhanced I&A; options counseling; short-term case management; transitions assistance | Solano<br>Napa (near emerging status) |
| <b>Connectivity Program</b>   |  |                                       |
| Digital connectivity and training support   | Internet connection and iPad training  | Napa and Solano                       |
| <b>Local Aging and Disability Action Planning Grant</b>   |  |                                       |
| Age-Friendly Community  | Age-Friendly community plan development  | Solano                                |

\* Fall prevention funding ending on March 31, 2026

\*\*CalFresh Healthy Living funding ending on April 30, 2026

### **SECTION 3. DESCRIPTION OF THE AREA AGENCY ON AGING (AAA)**

The Napa/Solano Area Agency on Aging (N/S AAA) is a Joint Exercise of Powers Agreement between Napa County and Solano County, designated as Planning and Service Area (PSA) 28. The Solano County Department of Health and Social Services provides staffing and organizational infrastructure for the AAA.

Effective August 28, 2018, the Joint Exercise of Powers Agreement (JEPA) between Napa and Solano County was approved by both the Napa and Solano County Boards of Supervisors. The JEPA established joint operation of the Napa/Solano Area Agency on Aging. Solano County Health and Social Services is the administrating agency for the Napa/Solano Area Agency on Aging.

The N/S AAA serving Planning Service Area (PSA) 28, is governed by a 7-member Oversight Board that is responsible for providing advice and review of AAA activities and reports; approval of contracts, grants, RFP awards and conducting at least one annual public hearing. Membership is comprised of one member from each County Board of Supervisors; one member from a city council in each county; one member of the older adult (60+) community in each county; one member at large from each County rotating annually. Alternate members are also appointed to represent each county. All Oversight Board members are appointed by the Board of Supervisors in the respective counties. The Oversight Board is governed by an approved set of bylaws.

The Advisory Council on Aging (ACOA) is composed of 20 members equally representative of Napa and Solano counties appointed by the Board of Supervisors in each county. The majority of the Advisory Council members are 60 years of age or older, serve as advocates for the needs of all older adults, including ethnic and racial representation; health care providers; supportive services providers; private and voluntary organization leaders; elected officials; family caregivers and the general public. The Advisory Council has four sub-committees: Executive, Legislative, Nutrition, Outreach. The Advisory Council is governed by bylaws approved by the Oversight Board. The Advisory Council makes recommendations to the Oversight Board and works with the community and AAA staff to meet requirements of the Older Americans Act and the Older Californians Act.

The N/S AAA staff consists of the **Health Services Administrator** for the Older and Disabled Adult Services Bureau in the Public Health Division of Solano County Health and Social Services. The **AAA Executive Director** is responsible for the daily operations, program planning and program monitoring activities. The AAA Executive Director is the staff to the Oversight Board and the AAA Advisory Council. The **Administrative Assistant** provides support for AAA operational needs. The **Staff Analyst** develops and monitors the AAA budget and provides budget information for program development and evaluation. The **Accountant** is responsible for all fiscal documentation and monitoring related to the AAA. The **AAA Project Manager** position is responsible for data reporting, analysis, planning and outreach.

The N/S AAA provides leadership on issues of aging through funding for services to support the independence, health, safety, and dignity of older adults, people with disabilities and their caregivers. The AAA utilizes community-based organizations in Napa and Solano Counties to

deliver these services. The AAA also provides leadership by participation in community activities related to older adults. The ACOA meetings and the Oversight Board meetings are publicized so that community members may attend and provide public comments. The ACOA newsletter, *AgeWell*, is distributed to over 25,000 people throughout both counties to increase awareness of AAA activities and community needs. The AAA website provides links to AAA service programs, ACOA initiatives, Oversight Board, ADRC Solano and Napa Connections, [SolanoCares](#) resource information.

The AAA is located within Solano County Health and Social Services Older and disabled Adult Services Bureau (ODAS). The Executive Director coordinates, through the Health Services Administrator, with ODAS on resources and outreach. The AAA Executive Director also attends internal staff and management meetings, increasing AAA access to County services and initiatives.

Kaiser Permanente and Partnership Health Plan provide managed Medi-Cal in Solano and Napa Counties. The AAA staff and Advisory members collaborate on ADRC, fall prevention and other health promotion initiatives.

N/S AAA and the Independent Living Resources Center (ILRC) were designated as an ADRC effective December 2023. The cumulative planning and implementation of ADRC Solano County services includes information and assistance; short-term case management; LTSS options counseling and transitions services. The ADRC also provided distribution of iPads and connections to training and connectivity resources.

**Update 2025:** A new full-time position, AAA Project Manager, was hired effective March 2025. The Project Manager is the primary liaison with the service providers to ensure program compliance and offer technical assistance. Additionally, the Project Manager focuses on data collection and analysis and supports the contracting process.

**Update 2026:** The Health Services Administrator is the interim AAA Executive Director following the retirement of the former Executive Director.

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## **SECTION 4. PLANNING PROCESS & ESTABLISHING PRIORITIES**

### ***Planning***

The AAA utilized the Community Assessment Survey for Older Adults (CASOA) and the Napa Older Adults Assessment (NOAA) to provide primary data to further identify the needs of the older adults in both Napa and Solano counties. The NOAA included key informant interviews as well as multiple representative focus group discussions.

The AAA also utilized the Solano Local Aging and Disability Action Planning process to garner a broad cross section of input on priority development for the local Master Plan for Aging.

The Solano Community Health Improvement Plan (CHIP) (January 2023) included AAA staff on the advisory committee. The needs of older adults are included in the identified goals.

- 1. Behavioral Health:** Ensure all Solano County residents feel safe, supported, and well in their communities.
- 2. Access to Care:** Eliminate inequities in access to preventive services and health care across Solano County.
- 3. Health:** Improve the well-being of BIPOC women, infants, children, and families.
- 4. Housing Stability:** Ensure all Solano County residents have access to safe, stable, and affordable housing.

### ***Public Involvement***

The AAA and the N/S AAA Advisory Council on Aging (ACOA) held community meetings and listening sessions in both counties focused on the interests and concerns of older adults, people with disabilities and their caregivers. The ACOA met with the Hispanic Chamber of Commerce and a rural Latino church congregation to specifically hear about unique needs and concerns.

The ACOA continues to hold community meetings to hear from local residents about their needs and concerns. Information about available services and resources is shared in the sessions. The ACOA Outreach Committee members report on the knowledge gained at the ACOA meetings. The N/S AAA staff and ACOA members regularly attend community meetings in both Napa and Solano Counties.

Public comment on issues of concern is part of the ACOA monthly meeting agenda and the Oversight Board meetings. The Oversight Board includes elected officials (both city and county) and older adult representatives.

The N/S AAA schedules Service Provider meetings for AAA contractors. At the Service Provider meeting participants share information about needs they encounter when providing services to older adults. Additionally, service providers offer innovative ideas for program development.

### ***Priorities***

The priority areas resulting from information gathered throughout the needs assessment process

are:

1. **Housing:** availability; cost; home maintenance, safety
2. **Isolation:** digital divide; accessible programs; elder abuse prevention
3. **Transportation:** rides to medical care and social activities
4. **Remaining at Home:** knowledge of services and resources: disaster and emergency support
5. **Health:** food; exercise; falls; caregiver needs

### ***Targeting; Prioritization; Adequate Proportion***

The AAA continues to identify and focus services on older adults with the greatest needs and the least access to services.

Services are prioritized by community needs and available funding resources as well as service provider capacity.

Adequate proportion amounts were determined based on the needs assessment findings; ACOA and Oversight Board review and the results of public hearing/public comment. The AAA will continue to evaluate the equitable distribution of funding as community needs, available services, and demographics change. Additionally, the AAA will coordinate with other planning and evaluation priorities in both Napa and Solano counties.

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## **SECTION 5. NEEDS ASSESSMENT & TARGETING**

### ***Process and Methods***

Community Assessment Survey for Older Adults (CASOA)

The CASOA survey instrument and its administration are standardized to assure high quality survey methods and comparable results across communities.

- Households with an adult member 55 years or older were selected at random. Multiple mailed contacts gave each household more than one prompt to participate.
- A total of 3,560 older adult households were randomly selected to receive the survey. These were followed by a hard-copied copy survey packet which included a cover letter, a copy of the households first received a half-page postcard inviting them to complete the survey online, questionnaire and a postage-paid return envelope.
- A total of 287 completed surveys were obtained, providing an overall response rate of 8.17% and a margin of error plus or minus 6% around any given percentage and one point around any given average rating for the entire sample (e.g., average number of caregiving hours).
- Results were statistically weighted to reflect the proper demographic composition of older adults in the entire community.

| <b>Community Readiness Chart</b> |   |                    |
|----------------------------------|---|--------------------|
| Dimension                        | Community Livability Topics   | Score (out of 100) |
| Overall Community Quality        | <ul style="list-style-type: none"> <li>• Place to Live and Retire</li> <li>• Recommend and remain in Community</li> </ul> | 65                 |
| Community Design                 | <ul style="list-style-type: none"> <li>• Housing</li> <li>• Mobility</li> <li>• Land Use</li> </ul>                       | 42                 |
| Employment and Finances          | <ul style="list-style-type: none"> <li>• Employment</li> <li>• Finances</li> </ul>  | 27                 |
| Equity and Inclusivity           | <ul style="list-style-type: none"> <li>• Equity</li> <li>• Community Inclusivity</li> </ul>                               | 46                 |
| Health and Wellness              | <ul style="list-style-type: none"> <li>• Safety</li> <li>• Physical Health</li> <li>• Mental Health</li> </ul>            | 38                 |

|                            |  |    |
|----------------------------|--|----|
|                            | <ul style="list-style-type: none"> <li>• Health Care</li> <li>• Independent Living</li> </ul>  |    |
| Information and Assistance | <ul style="list-style-type: none"> <li>• Quality of Older Adult Services</li> <li>• Information on Older Adult Services Available</li> </ul> | 28 |
| Productive Activities      | <ul style="list-style-type: none"> <li>• Civic Engagement</li> <li>• Social Engagement</li> <li>• Caregiving</li> </ul>                      | 44 |

- In addition to the random sample "probability" survey, an open participation survey was conducted, in which all older adults 55 years or older were invited to participate. The open participation survey instrument was identical to the probability sample survey. This survey was conducted entirely online.
  - A total of 394 surveys were completed by open participation survey respondents. The open participation survey results were combined with responses from the probability sample survey, for a total of 681 completed surveys. With the inclusion of the open participation survey participants, it is likely that the precision of the responses would be even greater (and thus the margin of error smaller). Results were statistically weighted to reflect the proper demographic composition of older adults in the entire community. (Napa/Solano Area Agency on Aging | Community Assessment Survey for Older Adults November 2023)

The Napa County Older Adults Assessment (NOAA is funded, in part, by the Napa County Board of Supervisors and by Napa County Health and Human Services through Mental Health Services Act (MHSA) Prevention and Early Intervention (PEI) funds. It is one of several MHSA programs implemented by the Napa County Behavioral Health Division, which strives to improve mental health outcomes for individuals and families throughout the community).

- March-October 2023 data collection conducting an on-line non-scientific survey, focus groups, and Key Informant Interviews who live in or serve as a caregiver in Napa County.
- Respondents were any interested community member 60+ or a caregiver for a 60+ adult.
- The survey resulted in 1530 responses.
- 8 focus groups1 8 Key Informant Interviews.
- Survey respondents were 78.4% white: 11.1% Latino/a/e.

NOAA results indicated six priority areas for strategic planning and action to support older adults to thrive: Health & Wellness, Housing, Transportation, Community Engagement & Connectedness, Caregiving, and Equity & Inclusion.

| NOAA Survey Results                    |  |
|--|--|
| Priorities                             | Solutions  |
| Finances and Employment                | Economic stability to support a thriving life  |
| Healthcare                             | Physical and mental health<br>Access to food, Independence   |
| Housing                                | Affordable, safe housing<br>Physically, emotionally, socially supportive living environments           |
| Transportation                         | Ability to access critical services and stay socially connected<br>Private and public mobility options |
| Information and Assistance             | Ease of access, Emergency awareness  |
| Community Engagement and Connectedness | Social Supports, Volunteerism<br>Participation in civic activities                                     |
| Caregiving                             | Affordability, Equitable pay<br>Support to age in place  |

### Target populations

Within the PSA, their characteristics, locations, needs, and the methods used to identify them. how the needs of targeted populations will be addressed.

A description of the barriers that targeted groups encounter when attempting to access existing services.

- The AAA has identified the following older adult population groups as potentially vulnerable and in need of specialized focus for service delivery.
  - 85+
  - People of color
  - Rural residents
  - Non-English speakers and legal immigrants
  - Undocumented immigrants
  - Low income/limited financial resources
  - Homebound with mobility limitations
  - Veterans
  - Unhoused
  - Socially isolated
  - Cognitively impaired/dementia (including Alzheimer's)
  - Living with HIV

- No access to technology or the internet
- Race/Ethnicity
  - In Napa County, 72% of 60+ are white and 28% are people of color. In Solano County, 47.7% of 60+ adults are white and 50% are people of color. Outreach to increase service delivery to underserved populations is a priority for the AAA.
  - “However, within the same county lines is a lower-income, often Latino/a/e community that faces disproportionate physical and economic challenges. These challenges are deeply rooted in barriers to economic security, healthcare, housing, transportation, and community information. (NOAA)
- LGBTQI
  - Outreach to the LGBTQI older adult community continues to be a service priority for the N/S AAA. The ACOA has included LGBTQI individuals in membership representation. The ADRC Advisory Committee and the Solano Master Plan Advisory Committee membership includes LGBTQI representation, as well. The AAA contracts with the Solano Pride Center to include case management as well as telephone reassurance and peer counseling. The goal is to create a safe and accepting environment in traditional senior centers and living facilities as well as through community forums, outreach and education.
- Rural; Economic and Social Need (low-income minority)
  - Upper Napa Valley and eastern Solano County are geographically isolated rural areas in both counties. There is a need for access to services, especially transportation, healthcare, and emergency services in both locations. Home delivered meals, including wellness checks and socialization opportunities are critical in isolated areas. Up Valley Family Center incorporates Information and Assistance into onsite services. Additional outreach and service development is a AAA priority.
- Social Isolation; Severe Disabilities; At Risk of Institutional Care
  - The newly designated ADRC provides enhanced information and assistance, options counseling, short-term care coordination and transitions assistance. The N/S AAA contracts with Collabria Care/Providence Community Health Napa Valley to provide case management and outreach to elders at risk of institutionalization and their caregivers. Through Choice in Aging, the AAA coordinates with PEAS (Prevention and Early Access for Seniors Program) focused on behavioral health support to address depression, anxiety and isolation. Also, through Choice in Aging, the ADRC coordinates with MSSP. The AAA has established a coordinated relationship with the North Bay Regional Center and NAMI Solano (National Alliance on Mental Health), as well as County Behavioral Health.
- Non-English Speakers

- In Napa County, about 19% of seniors speak a language other than English at home and 11% of seniors speak English less than “very well.” About 2,800 seniors in Napa speak Spanish, and about 1,400 seniors speak Asian languages (primarily Tagalog). Of seniors age 65 or older in Solano County, about 30% speak a language other than English at home and 15% of seniors speak English less than “very well.” About 12,500 seniors in Solano speak Asian languages (primarily Tagalog), and about 7,000 seniors speak Spanish. (Source: U.S. Census Bureau, 2018 – 2022 American Community Survey 5-Year Estimates; tables S1601; S1603; B16002) (data.census.gov (tables S1601, S1603, & B16002))
- The AAA has prioritized increasing access to information and assistance in languages other than English. AAA website provides content translation through Google translate to increase access to services and resources. The Senior Resource Guide is published in both English and Spanish.
- Alzheimer’s Disease/Dementia
  - Through the needs assessment process, it is clear that older adults and their family members are in need of more resources to support those with Alzheimer’s Disease and other dementias. Collabria Care/Providence Community Health Napa Valley, the Alzheimer’s Day Care Resource Center, provides specialized services to people with dementia and their families and caregivers. The AAA also contracts with the Alzheimer’s Association to provide information and assistance, caregiver outreach and counseling.
- Caregivers
  - The needs of and for caregivers were highlighted in both the CASOA and NOAA reports.
    - “A total of 52.2% of respondents report they would definitely or possibly use caregiver services in the future. 16.8% of respondents report they would not use caregiver services and 23% of respondents did not know that caregiving support services exist in Napa County.” (NOAA)
  - The AAA contracts with Redwood Caregiver Resource Center and Collabria Care/Providence Community Health Napa Valley to provide respite care programs in Napa and Solano counties. The ADRC also provides assistance to caregivers.
- HIV status
  - The AAA coordinates outreach to older adults living with HIV through Solano County Public Health and Solano Pride Center to inform about AAA services.

### **Targeted priorities**

Resulting from the sources the N/S AAA utilized to provide needs assessment information, the following priorities address the needs of targeted populations.

- **Housing:** availability; cost; home maintenance, safety

- **Isolation:** digital divide; accessible programs; elder abuse prevention
- **Transportation:** rides to medical care and social activities
- **Remaining at Home:** knowledge of services and resources: disaster and emergency support
- **Health:** food; exercise; falls; caregiver needs

#### **Update 2025:**

Aligning with our priority areas, the Advisory Council formed workgroups to better understand how the AAA service providers are meeting the needs and how the ACOA can support their efforts. The first work groups focused on Transportation, Senior Nutrition, and Physical Health. The reports were shared with the full ACOA with recommendations for supporting organizations including volunteering, outreach, and advocacy.

Solano Master Plan for Aging and Disability (MPAD) held 20 listening sessions between March and July 2024. 241 individuals participated. The resulting priorities are:

- Awareness of and Accessing Services and Supports
- Healthcare & Physical Health
- Mental Health
- Housing
- Transportation
- Safety

#### **Update 2026:**

- ACOA committees were refocused in response to community needs and priorities for FY 2025-2026. Committees are Needs of providers; transportation; Caregiving; Next Generation Caregivers.
- Napa County developed a Master Plan on Aging and Disability using the recently completed Napa County Older Adults Assessment. Findings were analyzed and synthesized into 7 priority themes and 43 tasks which comprises the Napa County Master Plan on Aging. The plan goals include Coordinated Approach; Financial Security; Health; Affordable Housing; Transportation; Emergency Preparedness; and Caregiving. Together, these goals will create a coordinated framework to address disparities, improve access and advance quality of life for older adults across Napa County.
- Solano County Master Plan on Aging – Launched in October 2025 and now focused on community meetings to garner support and strategy around priorities beginning with “Awareness of and Accessing Services and Supports.
- Napa County enhanced client service delivery through the Be Well Mobile Services mobile unit that brings safety net service to various communities. Through five events at the

Napa Senior Center, staff reached 16 older and disabled adults safety net services including but not limited to assistance with accessing In Home Supportive Services, Cal-Fresh, Medi-Cal and behavioral health services.

- Connections Napa County – has 13 partners and is waiting for designation status through the California Department of Aging (CDA).
- Performed monitoring visits to all services providers to promote compliance with services and support data reporting requirements.
- Continuing to work with CDA on implementation of Senate Bill 1249 which is also known as the Older Californians Act 2030 which will trigger new core programs, performance measures and integration of AAA services with social service programs to strengthen the AAA network to respond to the growing and increasingly diverse numbers of older adults in California. Participate in ongoing education discussions and advocacy with the California Association of Area Agency on Aging to prepare for more integration of aging services.
- Participated in interview sessions the Scan Foundation of how AAAs are adjusting to new CDA initiatives; current and future needs of the N/S AAA; and plans to educate community.

## **SECTION 6. PRIORITY SERVICES & PUBLIC HEARINGS**

### ***2024-2028 Four-Year Planning Cycle***

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

The CCR, Article 3, Section 7312, requires the AAA to allocate an “adequate proportion” of federal funds to provide Access, In-Home Services, and Legal Assistance in the PSA. The annual minimum allocation is determined by the AAA through the planning process. The minimum percentages of applicable Title III B funds<sup>2</sup> listed below have been identified for annual expenditure throughout the four-year planning period. These percentages are based on needs assessment findings, resources available within the

PSA, and discussions at public hearings on the Area Plan.

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

#### **Access:**

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

**2024-25: 33%**      **25-26: 33%**      **26-27 33 %**      27-28\_\_%

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

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

**2024-25: 15%**      **25-26: 15%**      **26-27 15 %**      27-28\_\_%

#### **Legal Assistance Required Activities:<sup>3</sup>**

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

**2024-25: 11%**      **25-26: 11%**      **26-27 11 %**      27-28\_\_%

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

Adequate proportion amounts were determined based on the needs assessment findings; ACOA and Oversight Board review and the results of public hearing/public comment.

<sup>2</sup> Minimum percentages of applicable funds are calculated on the annual Title IIIB baseline allocation, minus Title IIIB administration and minus Ombudsman. At least one percent of the final Title IIIB calculation must be allocated for each “Priority Service” category

or a waiver must be requested for the Priority Service category(s) that the AAA does not intend to fund.

<sup>3</sup> Legal Assistance must include all the following activities: Legal Advice, Representation, Assistance to the Ombudsman Program and Involvement in the Private Bar.

**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? <sup>4</sup><br>Yes or No | Was hearing held at a Long-Term Care Facility? <sup>5</sup><br>Yes or No |
|-------------|---------------|--|---------------------|--|--|
| 2024-2025   | April 1, 2024 | Solano County Events Center, Fairfield, CA       | 18                  | No   | No   |
| 2025-2026   | April 1, 2025 | Solano County Events Center, Fairfield, CA       | 29                  | No   | No   |
| 2026-2027   | April 7, 2026 | Solano County Events Center, Fairfield, CA       | 30                  | No   | No   |
|             | April 8, 2026 | Comprehensive Services for Older Adults, Napa CA |                     | No   | No   |
| 2027-2028   |               |  |                     |  |  |

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

1. Summarize the outreach efforts used in seeking input into the Area Plan from institutionalized, homebound, and/or disabled older individuals.

*Area Plan posted on N/S AAA website, newspapers, announcements sent in AgeWell newsletter and e-newsletter sent by County Supervisor, community meetings held throughout PSA during the year; individual conversations with community members by members of the Advisory Committee, service providers invited and asked to solicit information from clients.*

2. Were proposed expenditures for Program Development (PD) or Coordination (C) discussed?

Yes. Go to question #3

Not applicable, PD and/or C funds are not used. Go to question #4

3. Summarize the comments received concerning proposed expenditures for PD and/or C

4. Attendees were provided the opportunity to testify regarding setting minimum percentages of Title III B program funds to meet the adequate proportion of funding for Priority Services

Yes. Go to question #5

No, Explain:

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

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

7. Note any changes to the Area Plan that were a result of input by attendees.

<sup>4</sup> A translator is not required unless the AAA determines a significant number of attendees require translation services.

<sup>5</sup> AAAs are encouraged to include individuals in LTC facilities in the planning process, but hearings are not required to be held in LTC facilities.

## SECTION 7. AREA PLAN NARRATIVE GOALS & OBJECTIVES

### Goal #1

**Goal:** Increase awareness of resources, access to services and supports for older adults and family caregivers.

**Rationale:** Availability and knowledge of long-term services and supports (LTSS) is identified survey participants and community responses as key to enhancing quality of life for older adults.

**MPA goal:** Inclusion and Equity, not isolation. Affording Aging.

| Objective   | Projected Start and End Dates | Type of Activity and Funding Source <sup>6</sup> | Update Status <sup>7</sup> |
|---|-------------------------------|--|----------------------------|
| <p><b>Objective 1:</b> Promote dissemination of information about safe driving and transportation options for older adults and adults with disabilities. Annually, distribute 500 brochures, publish 4 articles about transportation options, and participate in NVTA and STA meetings.</p> <p><b>2025</b> – Regularly attended meetings, distributed brochures and tabling events, participated in NVTA and STA meetings.</p> <p>2026 NSAAA staff and ACOA members regularly attend NVTA and STA meetings; distribute material at more than 15 tabling events throughout Napa and Solano County and participate in the new NVTA mobility monitor program pilot by promoting services</p> | 7/1/2024-6/30/2028            | IIIB   | <b>Continued</b>           |
| <p><b>Objective 2:</b> Enhance information and assistance (I&amp;A) program by expanding access through web, phone and in-person response and integrate the I&amp;A function in Solano County into ADRC</p>   | 7/1/2024-6/30/2028            | IIIB   | <b>Continued</b>           |

|   |                           |             |                         |
|---|---------------------------|-------------|-------------------------|
| <p>Solano through an integrated referral and follow-up system.</p> <p><b>2025 – Provided over 300 updates to the online information portal, increased intake and I&amp;A staff at the ADRC.</b></p> <p>2026 – Continue to increase outreach for our Solano ADRC and Napa Connections through website; service partner connections; ACOA tabling events in the community; and county collaboration.</p>  |                           |             |                         |
| <p><b>Objective 3:</b> Collaborate to expand online tools and printed materials about available services and resources for older adults. Create and implement an annual outreach and education campaign targeting underserved communities and focusing on emergency services preparedness.</p> <p><b>2025 – Updated printed Senior Resource Guide in English and Spanish in both Napa and Solano Counties. Creating updated websites and working on an annual education campaign to be implemented once the website is complete.</b></p> <p>2026 – Will distribute over 7,000 Senior Resource Guides in both Napa and Solano Counties in English and Spanish promoting Solano ADRC and Napa Connections services in our AgeWell Newsletter; and via the aaans.org website</p> | <p>7/1/2024-6/30/2028</p> | <p>IIIB</p> | <p><b>Continued</b></p> |
| <p><b>Objective 4:</b> Provide current resource information for LGBTQI older adults and seniors living with HIV through collaboration with local agencies and stakeholders.</p> <p>2025 - ADRC is providing materials regarding LGBTQI resources.</p>   | <p>7/1/2024-6/30/2028</p> | <p>IIIB</p> | <p><b>Continued</b></p> |

|  |  |  |  |
|--|--|--|--|
| 2026 - Solano ADRC and Napa Connections provide services regarding LGBTQI resources. |  |  |  |
|--|--|--|--|

**Goal #2**

**Goal:** Enhance safety, physical and mental health and wellbeing of older adults and family caregivers through coordinated long-term services and supports (LTSS) emphasizing livable communities and healthy aging.

**Rationale:** Health issues are included as a critical concern noted by survey participants and community responses. Providing options for older adults to enhance their access to food, exercise, and fall prevention.

**MPA Goal:** Health Reimagined.

| Objective  | Projected Start and End Dates | Type of Activity and Funding Source <sup>6</sup> | Update Status <sup>7</sup> |
|--|-------------------------------|--|----------------------------|
| <p><b>Objective 1:</b> Expand Fall Prevention Programs through collaboration with the provider organizations, county services, and healthcare providers to create an identified community resource for fall assessments, referrals, protocols in both Napa and Solano counties.</p> <p><b>2025 - Increased funding for services through Solano Public Health.</b></p> <p>2026 - Apply for funding through Public Health collaboration with community partners.</p> | 7/1/2024-6/30/2028            | IIIB   | <b>Continued</b>           |
| <p><b>Objective 2:</b> Collaborate with county, city, and community providers to build a digital equity eco system that addresses digital inclusion for older adults that facilitates the use of digital devices to connect with telehealth, friends, and family in order to reduce isolation.</p>   | 7/1/24 - 6/30/28              | C  | <b>Completed</b>           |

|  |                  |   |                  |
|--|------------------|---|------------------|
| <p><b>2025 - Completed by working with Digital Equity teams in Napa and Solano to use County funding to expand digital classes for older adults and provide digital devices for seniors.</b></p>   |                  |   |                  |
| <p><b>Objective 3:</b> Support digital training sites in 5 senior centers and three low-income senior housing complexes.<br/><b>2025 - Digital training sites created at senior centers in both Napa and Solano Counties.</b></p>  | 7/1/24 - 6/30/28 | C | <b>Completed</b> |
| <p><b>Objective 4:</b> Assist in creating and maintaining a resource that identifies locations offering free internet access and disseminating the information.<br/><b>2025 - No work has begun on this.</b><br/><b>2026 - No work has begun on this</b></p>   | 7/1/24 - 6/30/28 | C | <b>Continued</b> |
| <p><b>Objective 5:</b> Assist in creating an intergenerational digital training program for older adults.<br/><b>2025 - Work with County IT department to hire tech company to teach digital literacy classes.</b></p>   | 7/1/24 - 6/30/28 | C | <b>Completed</b> |
| <p><b>Objective 6:</b> Attend monthly community meetings with housing representatives to share information about housing availability for older adults.<br/><b>2025 - Attended quarterly housing/homelessness meetings to share resources in Solano County.</b><br/><b>2026 Attend housing/homelessness meeting to glean and share resources in Solano and Napa Counties</b></p> | 7/1/24 - 6/30/28 | C | <b>Continued</b> |
| <p><b>Objective 7:</b> Attend monthly emergency preparedness community meetings to share information about emergency and disaster planning for older adults.<br/><b>2025 - Attend Solano Voluntary Organizations Active in Disaster</b></p>  | 7/1/24 - 6/30/28 | C | <b>Continued</b> |

|   |  |  |  |
|---|--|--|--|
| <p><b>(VOAD) meetings and state Emergency Preparedness meetings to share ideas.</b><br/> <b>2026 - Attend VOAD meetings and Solano Public Information Network quarterly meetings.</b></p> |  |  |  |
|---|--|--|--|

**Goal #3**

**Goal:** Establish partnerships with service providers, local agencies, elected officials and stakeholders to promote collaboration and advocacy for increased countywide and cross-county resources to address the needs of older adults and their family caregivers.

**Rationale:** Policy, program development and advocacy for community needs including housing, disaster response/emergency preparedness.

**MPA Goal:** Housing for all ages and stages. Affording Aging.

| <b>Objective</b>  | <b>Projected Start and End Dates</b> | <b>Type of Activity and Funding Source<sup>6</sup></b> | <b>Update Status<sup>7</sup></b> |
|---|--------------------------------------|--|----------------------------------|
| <p><b>Objective 1:</b> Collaborate and provide technical assistance to identify programmatic needs of older adults and adults with disabilities with local agencies, county departments, decision-makers and stakeholders.<br/> <b>2025 - identified in local Master Plan for Aging and Disabilities with work to begin in FY2526.</b><br/> <b>2026 Continue work in Solano and Napa Counties on local Master Plan on Aging and Disability priorities</b></p> | <p>7/1/2024-6/30/2028</p>            | <p>C</p>   | <p><b>Continued</b></p>          |
| <p><b>Objective 2:</b> Lead local Master Plan for Aging strategic plan development and implementation including coordinating work with the MPA Advisory Committee, community members, and elected officials on development of Solano MPA action plan.<br/> <b>2025 - Plan developed and pending approval by the Board of Supervisors</b></p>  | <p>7/1/2024-6/30/2028</p>            | <p>C</p>   | <p><b>Continued</b></p>          |

|   |                           |          |                         |
|---|---------------------------|----------|-------------------------|
| <p><b>in May. Once adopted, action plans will be implemented.</b><br/> <b>2026 Developed a community workgroup for Solano County on awareness of and accessing services and work with community organizations for focused outreach and information.</b></p>   |                           |          |                         |
| <p><b>Objective 3:</b> Coordinate with local Master Plan for Aging activities in Napa through support of the Napa Older Adult Assessment project and implementation.<br/> <b>2025 – ADRC received Emerging status, which was a result of the MPA actions.</b><br/> <b>2026 Napa Connections is applying for “Designation” status</b></p>  | <p>7/1/2024-6/30/2028</p> | <p>C</p> | <p><b>Continued</b></p> |
| <p><b>Objective 4:</b> Coordinate advocacy to increase access to affordable, accessible housing.<br/> <b>2025 – No work begun on this.</b><br/> 2026 – Participate in Solano County Homeless Community meetings. Collaborate with Adult Protective Services Home Safe Programs for victims of abuse who are experiencing homelessness and at risk of homelessness in Napa and Solano counties</p> | <p>7/1/2024-6/30/2028</p> | <p>C</p> | <p><b>Continued</b></p> |

**Goal #4**

**Goal:** Expand services to underserved, at risk older adult populations and their caregivers through focused services and supports.

**Rationale:** Identified need for inclusive planning and service provision for at-risk and vulnerable population groups.

**MPA Goal:** Inclusion and Equity, not isolation.

| Objective   | Projected Start and End Dates | Type of Activity and Funding Source <sup>6</sup> | Update Status <sup>7</sup> |
|---|-------------------------------|--|----------------------------|
| <p><b>Objective 1:</b> Collaborate with nutrition providers and elected officials to identify nutrition gaps; opportunities to enhance meal quality, identify additional non-AAA funded nutrition resources and programs.</p> <p><b>2025 – Contracted with new congregate meal vendor. ACOA workgroup reviewing gaps.</b></p> <p><b>2026 – Wiser Dining initiative implemented at seven senior sites in Solano County to promote client-centered, health-enhancing environments. Partnered with Food is Free Bay Area to reduce food waste by collecting and distributing leftovers from the seven senior sites to community members in need.</b></p> | 7/1/2024-6/30/2028            | C  | Continued                  |
| <p><b>Objective 2:</b> Collaborate with legal services providers, Long-Term Care Ombudsman organizations, Solano and Napa County older adult services, and other interested stakeholders to coordinate and promote elder abuse prevention and increase participation in MDT meetings.</p> <p><b>2025 – Attended MDT Convening in Sacramento to reform the local MDT workgroups.</b></p> <p><b>2026 Plan to participate in the Multi-disciplinary Team (MDT) Convening in Sacramento to enhance the local MDT workgroups.</b></p>  | 7/1/2024-6/30/2028            | IIIB   | Continued                  |

|   |                    |      |                  |
|---|--------------------|------|------------------|
| <p><b>Objective 3:</b> Collaborate with ADRC Solano to develop 4 extended partners and 20 referral agencies.</p> <p><b>2025 – Continue increasing new partnerships.</b></p> <p><b>2026 – Continue increasing new partnerships</b></p>   | 7/1/2024-6/30/2028 | IIIB | <b>Continued</b> |
| <p><b>Objective 4:</b> Coordinate with Solano County IT to create digital inclusion strategy to reach older and disabled adults.</p> <p><b>2025- Secured funding for older adult tech training and supported grant to fund additional supports for seniors and dabled adults.</b></p> | 7/1/2024-6/30/2028 | C    | <b>Completed</b> |

**Goal #5**

**Goal:** Provide services to support family caregivers and care receivers to maintain a healthy, safe lifestyle in the home setting.

**Rationale:** Caregiving is routinely identified in needs assessment and community feedback as a critical need for support and expanded services.

**MPA Goal:** Caregiving that Works.

| Objective   | Projected Start and End Dates | Type of Activity and Funding Source <sup>6</sup> | Update Status <sup>7</sup> |
|---|-------------------------------|--|----------------------------|
| <p><b>Objective 5.1:</b> Collaborate to strengthen resources for family caregivers through periodic (6 month) individual assessments, referrals and monitoring.</p> <p><b>2025 – More work needs to be done.</b></p> <p>2026 ACOA is sharing information about resources in the GUIDE ----</p> <p><b>Instagram account created to support the next generation of caregiving by sharing information and resources available.</b></p> | 7/1/2024-6/30/2028            | IIIE   | <b>Continued</b>           |

<sup>6</sup> If not a program specific goal, indicate if the objective is Administration (Admin,) Program Development (PD) or Coordination (C). If a PD objective is not completed in the timeline required and is continuing in the following year, provide an update with additional tasks. For the program specific goals and objectives please identify service category where applicable.

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

## SECTION 8. SERVICE UNIT PLAN (SUP)

### **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).

For services not defined in OAAPS, refer to the Service Categories and Data Dictionary.

1. Report on the units of service provided with **ALL regular AP funding sources**. Related funding is reported in the annual Area Plan Budget (CDA 122) for Titles IIIB, IIIC-1, IIIC-2, IIID, and VII. Only report services provided; others may be deleted.
2. A written justification is required for service unit decrease greater than 10%: Citation: CDA Program Guide, Section 4.4.(1) Scope of Work

Personal Care (In-Home)

Unit of Service = 1 hour

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 0                         |              |                                   |
| 2025-2026   | 40                        |              | 1.1; 1.2; 1.3; 1.4                |
| 2026-2027   | 40                        |              | 1.1; 1.2; 1.3; 1.4                |
| 2027-2028   |                           |              |                                   |

Homemaker (In-Home)

Unit of Service = 1 hour

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 0                         |              |                                   |
| 2025-2026   | 0                         |              |                                   |
| 2026-2027   | 0                         |              |                                   |
| 2027-2028   |                           |              |                                   |

Chore (In-Home)

Unit of Service = 1 hour

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 0                         |              |                                   |
| 2025-2026   | 0                         |              |                                   |
| 2026-2027   | 0                         |              |                                   |
| 2027-2028   |                           |              |                                   |

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

Unit of Service = 1 hour

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 0                         |              |                                   |
| 2025-2026   | 0                         |              |                                   |
| 2026-2027   | 0                         |              |                                   |
| 2027-2028   |                           |              |                                   |

Case Management (Access)

Unit of Service = 1 hour

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 375                       | 2; 4         | 2.2; 4.3                          |
| 2025-2026   | 375                       | 2;4          | 2.2; 4.3                          |
| 2026-2027   | 1,000                     | 2;4          | 2.2; 4.3                          |
| 2027-2028   |                           |              |                                   |

Assisted Transportation (Access)

Unit of Service = 1 one-way trip

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 0                         |              |                                   |
| 2025-2026   | 0                         |              |                                   |

|                  |   |  |  |
|------------------|---|--|--|
| <b>2026-2027</b> | 0 |  |  |
| <b>2027-2028</b> |   |  |  |

Transportation (Access)

Unit of Service = 1 one-way trip

| <b>Fiscal Year</b> | <b>Proposed Units of Service</b> | <b>Goal Numbers</b> | <b>Objective Numbers (if applicable)</b> |
|--------------------|----------------------------------|---------------------|--|
| <b>2024-2025</b>   | 2,000                            | 1;4                 | 1.1; 4.3                                 |
| <b>2025-2026</b>   | 2,000                            | 1;4                 | 1.1; 4.3                                 |
| <b>2026-2027</b>   | 6,900                            | 1;4                 | 1.1; 4.3                                 |
| <b>2027-2028</b>   |                                  |                     |  |

Information and Assistance (Access)

Unit of Service = 1 contact

| <b>Fiscal Year</b> | <b>Proposed Units of Service</b> | <b>Goal Numbers</b> | <b>Objective Numbers (if applicable)</b>              |
|--------------------|----------------------------------|---------------------|---|
| <b>2024-2025</b>   | 4,000                            | 1; 2;3;4;5          | 1.1, 1.2, 1.3, 1.4; 2.3, 2.6, 2.7; 3.4; 4.3, 4.4; 5.1 |
| <b>2025-2026</b>   | 4,000                            | 1; 2;3;4;5          | 1.1, 1.2, 1.3, 1.4; 2.3, 2.6, 2.7; 3.4; 4.3, 4.4; 5.1 |
| <b>2026-2027</b>   | 4,000                            | 1; 2;3;4;5          | 1.1, 1.2, 1.3, 1.4; 2.3, 2.6, 2.7; 3.4; 4.3, 4.4; 5.1 |
| <b>2027-2028</b>   |                                  |                     |   |

Outreach (Access)

Unit of Service = 1 contact

| <b>Fiscal Year</b> | <b>Proposed Units of Service</b> | <b>Goal Numbers</b> | <b>Objective Numbers (if applicable)</b>    |
|--------------------|----------------------------------|---------------------|---|
| <b>2024-2025</b>   | 100                              | 1;2;3;5             | 1.1, 1.2, 1.3, 1.4; 2.2, 2.3, 2.7, 3.4; 5.1 |
| <b>2025-2026</b>   | 100                              | 1;2;3;5             | 1.1, 1.2, 1.3, 1.4; 2.2, 2.3, 2.7, 3.4; 5.1 |
| <b>2026-2027</b>   | 100                              | 1;2;3;5             | 1.1, 1.2, 1.3, 1.4; 2.2, 2.3, 2.7, 3.4; 5.1 |
| <b>2027-2028</b>   |                                  |                     |   |

Legal Assistance

Unit of Service = 1 hour

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 3,000                     | 4            | 4.2                               |
| 2025-2026   | 3,000                     | 4            | 4.2                               |
| 2026-2027   | 3,000                     | 4            | 4.2                               |
| 2027-2028   |                           |              |                                   |

Congregate Meals

Unit of Service = 1 meal

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 33,000*                   | 4            | 4.1                               |
| 2025-2026   | 33,000*                   | 4            | 4.1                               |
| 2026-2027   | 33,000                    | 4            | 4.1                               |
| 2027-2028   |                           |              |                                   |

Home-Delivered Meals

Unit of Service = 1 meal

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 320,000                   | 4            | 4.1                               |
| 2025-2026   | 320,000                   | 4            | 4.1                               |
| 2026-2027   | 320,000                   | 4            | 4.1                               |
| 2027-2028   |                           |              |                                   |

Nutrition Counseling

Unit of Service = 1 hour

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (if applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 0                         |              |                                   |
| 2025-2026   | 0                         |              |                                   |

|                  |   |  |  |
|------------------|---|--|--|
| <b>2026-2027</b> | 0 |  |  |
| <b>2027-2028</b> |   |  |  |

Nutrition Education

Unit of Service = 1 session

| <b>Fiscal Year</b> | <b>Proposed Units of Service</b> | <b>Goal Numbers</b> | <b>Objective Numbers (if applicable)</b> |
|--------------------|----------------------------------|---------------------|--|
| <b>2024-2025</b>   | 8                                | 2,3                 |  |
| <b>2025-2026</b>   | 8                                | 2,3                 |  |
| <b>2026-2027</b>   | 8                                | 2,3                 |  |
| <b>2027-2028</b>   |                                  |                     |  |

*\*Congregate meal numbers are significantly less than in previous years due to fewer people returning to congregate sites after COVID.*

**A. OAAPS Service Category – “Other” Title III Services**

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

**Title IIIB, Other Priority and Non-Priority Supportive Services**

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

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

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

**Other Supportive Service Category**

**Unit of Service**

In-Home Visiting  
Telephone Reassurance

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (If applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 7,500                     | 2            | 2.1, 2.5                          |
| 2025-2026   | 7,500                     | 2            | 2.1,2.5                           |
| 2026-2027   | 7,500                     | 2            | 2.1,2.5                           |
| 2027-2028   |                           |              |                                   |

Cash/Material Aid

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (If applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 20                        | 2; 3         | 2.1, 2.7; 3.1                     |
| 2025-2026   | 8000                      | 2            | 2.7                               |
| 2026-2027   | 8,000                     | 2            | 2.7                               |
| 2027-2028   |                           |              |                                   |

Residential Repairs/Maintenance

| Fiscal Year | Proposed Units of Service | Goal Numbers | Objective Numbers (If applicable) |
|-------------|---------------------------|--------------|-----------------------------------|
| 2024-2025   | 20                        | 2            | 2.1                               |
| 2025-2026   | 20                        | 2            | 2.1                               |
| 2026-2027   | 20                        | 2            | 2.1                               |
| 2027-2028   |                           |              |                                   |

**B. Title IIID/Health Promotion—Evidence-Based**

- Provide the specific name of each proposed evidence-based program.

**Evidence-Based Program Name(s): Tai Chi: A Matter of Balance and Bingocize**

*Add additional lines if needed.*

**Unit of Service = 1 contact; 2026 Unit of Service=1 session**

| <b>Fiscal Year</b> | <b>Proposed Units of Service</b> | <b>Goal Numbers</b> | <b>Objective Numbers (If applicable)</b> |
|--------------------|----------------------------------|---------------------|--|
| <b>2024-2025</b>   | 676                              | 2                   | 2.1                                      |
| <b>2025-2026</b>   | 676                              | 2                   | 2.1                                      |
| <b>2026-2027*</b>  | 676                              | 2                   | 2.1                                      |
| <b>2027-2028</b>   |                                  |                     |  |

\*Tai Chi: A Matter of Balance no longer offered

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

**PROGRAM OUTCOMES**

**2024-2028 Four-Year Planning Cycle**

As mandated by the Older Americans Act Reauthorization 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) will forward baseline numbers to the AAA from the prior fiscal year National Ombudsman Reporting System (NORS) data as entered into the Statewide Ombudsman Program database by the local LTC Ombudsman Program and reported by the OSTLCO in the State Annual Report to the Administration on Aging (AoA).

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

Complete all Measures and Targets for Outcomes 1-3.

**Outcome 1.**

The problems and concerns of long-term care residents are solved through complaint resolution and other services of the Ombudsman Program. Older Americans Act Reauthorization Act of 2020, Section 712(a)(3), (5)]

**Measures and Targets:**

**A. Complaint Resolution Rate (NORS Element CD-08) (Complaint Disposition).** The average California complaint resolution rate for FY 2022-2023 was 52%.

| Fiscal Year<br>Baseline<br>Resolution Rate | # of partially<br>resolved or fully<br>resolved complaints | Divided by<br>the total<br>number of<br>Complaints | = Baseline<br>Resolution<br>Rate | Fiscal Year<br>Target<br>Resolution Rate |
|--|--|--|----------------------------------|--|
| <b>2022-2023</b>                           |  |  |                                  |  |
| <b>Napa</b>                                | 74   | 92   | 80%                              | 100%                                     |
| <b>Solano</b>                              | 182  | 263  | 69%                              | 100%                                     |
| <b>2024-2025</b>                           |  |  |                                  |  |
| <b>Napa</b>                                | 36   | 47   | 77%                              | 100%                                     |
| <b>Solano</b>                              | 113  | 150  | 75%                              | 100%                                     |
| <b>2026-2027</b>                           |  |  |                                  |  |
| <b>Napa</b>                                | 67   | 81   | 83%                              | 100%                                     |
| <b>Solano</b>                              | 75   | 95   | 79%                              | 100%                                     |
| <b>2027-2028</b>                           |  |  |                                  |  |

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

|  |
|--|
| <p>1. <b>Napa:</b> FY 2022-2023<br/>Baseline: Number of Resident Council meetings attended <u>48</u><br/>FY 2024-2025 Target: <u>45</u><br/><b>Solano:</b> FY 2022-2023<br/>Baseline: Number of Resident Council meetings attended <u>3</u><br/>FY 2024-2025 Target: <u>10</u></p> |
| <p>2. <b>Napa:</b> FY 2023-2024 Baseline: Number of Resident Council meetings attended <u>55</u> FY 2025-2026 Target: <u>45</u><br/><b>Solano:</b> FY 2023-2024 Baseline: Number of Resident Council meetings attended <u>6</u> FY 2025-2026 Target: <u>10</u></p>                 |
| <p>3. <b>Napa:</b> FY 2024-2025 Baseline: Number of Resident Council meetings attended <u>58</u> FY 2026-2027 Target: <u>45</u><br/><b>Solano:</b> FY 2024-2025 Baseline: Number of Resident Council meetings attended <u>4</u> FY 2026-2027 Target: <u>10</u></p>                 |

4. FY 2025-2026 Baseline: Number of Resident Council meetings attended \_\_\_\_\_ FY  
 2027-2028 Target: \_\_\_\_\_

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

|  |
|--|
| <p>1. <b>Napa:</b> FY 2022-2023<br/>         Baseline: Number of Family Council meetings attended <u>0</u><br/>         FY 2024-2025 Target: <u>1</u><br/> <b>Solano:</b> FY 2022-2023<br/>         Baseline: Number of Family Council meetings attended <u>1</u><br/>         FY 2024-2025 Target: <u>5</u></p> |
| <p>2. <b>Napa:</b> FY 2023-2024 Baseline: Number of Family Council meetings attended <u>0</u> FY 2025-2026 Target: <u>1</u><br/> <b>Solano:</b> FY 2023-2024 Baseline: Number of Family Council meetings attended <u>0</u> FY 2025-2026 Target: <u>5</u></p>   |
| <p>3. <b>Napa:</b> FY 2024-2025 Baseline: Number of Family Council meetings attended <u>6</u> FY 2026-2027 Target: <u>1</u><br/> <b>Solano:</b> FY 2024-2025 Baseline: Number of Family Council meetings attended <u>1</u> FY 2026-2027 Target: <u>1</u></p>   |
| <p>4. FY 2025-2026 Baseline: Number of Family Council meetings attended _____<br/>         FY 2027-2028 Target: _____</p>  |

**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.

|  |
|--|
| <p>1. <b>Napa:</b> FY 2022-2023<br/>         Baseline: 160<br/>         Number of Instances <u>160</u><br/>         FY 2024-2025 Target: <u>300</u><br/> <b>Solano:</b> FY 2022-2023<br/>         Baseline: 1456<br/>         Number of Instances <u>1456</u><br/>         FY 2024-2025 Target: <u>500</u></p> |
| <p>2. <b>Napa:</b> FY 2023-2024 Baseline: Number of Instances <u>128</u><br/>         FY 2025-2026 Target: <u>300</u><br/> <b>Solano:</b> FY 2023-2024 Baseline: Number of Instances <u>702</u><br/>         FY 2025-2026 Target: <u>500</u></p>   |

|   |    |
|---|----|
| 3. <b>Napa:</b> FY 2024-2025 Baseline: Number of Instances 173<br>FY 2026-2027 Target: 300<br><b>Solano:</b> FY 2024-2025 Baseline: Number of Instances 480<br>FY 2026-2027 Target: 500 |    |
| 4. FY 2025-2026 Baseline: Number of Instances _____<br>2027-2028 Target: _____  | FY |

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

|   |    |
|---|----|
| 1. <b>Napa:</b> FY 2022-2023<br>Baseline: 865<br>Number of Instances: 865<br>FY 2024-2025 Target: 1000<br><b>Solano:</b> FY 2022-2023<br>Baseline: 1020<br>Number of Instances: 1020<br>FY 2024-2025 Target: 1300 |    |
| 2. <b>Napa:</b> FY 2023-2024 Baseline: Number of Instances 741<br>FY 2025-2026 Target: 1000<br><b>Solano:</b> FY 2023-2024 Baseline: Number of Instances 330<br>FY 2025-2026 Target: 1000                         |    |
| 3. <b>Napa:</b> FY 2024-2025 Baseline: Number of Instances 690<br>2026-2027 Target: 1000<br><b>Solano:</b> FY 2024-2025 Baseline: Number of Instances 504<br>FY 2026-2027 Target: 1000                            | FY |
| 4. FY 2025-2026 Baseline: Number of Instances _____<br>2027-2028 Target: _____  | FY |

**F. Community Education** (NORS Element S-68) LTC Ombudsman Program participated 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.

|  |
|--|
| <p>1. <b>Napa:</b> FY 2022-2023<br/> Baseline: 3<br/> Number of Sessions: <u>3</u><br/> FY 2024-2025 Target: <u>10</u></p> <p><b>Solano:</b> FY 2022-2023<br/> Baseline: 4<br/> Number of Sessions: <u>4</u><br/> FY 2024-2025 Target: <u>15</u></p> |
| <p>2. <b>Napa:</b> FY 2023-2024 Baseline: Number of Sessions <u>12</u><br/> FY 2025-2026 Target: <u>10</u></p> <p><b>Solano:</b> FY 2023-2024 Baseline: Number of Sessions <u>11</u><br/> FY 2025-2026 Target: <u>15</u></p>                         |
| <p>3. <b>Napa:</b> FY 2024-2025 Baseline: Number of Sessions <u>17</u><br/> FY 2026-2027 Target: <u>15</u></p> <p><b>Solano:</b> FY 2024-2025 Baseline: Number of Sessions <u>5</u><br/> FY 2026-2027 Target: <u>15</u></p>                          |
| <p>4. FY 2025-2026 Baseline: Number of Sessions _____<br/> 2027-2028 Target: _____</p>   |

FY

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

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

Systems Advocacy can include efforts to improve conditions in one LTC facility or can be county-wide, state-wide, or even national in scope. (Examples: Work with LTC facilities to improve pain relief or increase access to oral health care, work with law enforcement entities to improve response and investigation of abuse complaints, collaboration with other agencies to improve LTC residents' quality of care and quality of life, participation in disaster preparedness planning, participation in legislative advocacy efforts related to LTC issues, etc.) Be specific about the actions planned by the local LTC Ombudsman Program.

Enter information in the relevant box below.

#### FY 2024-2025

**FY 2024-2025 Systems Advocacy Effort(s):** (Provide one or more new systems advocacy efforts)

**Napa:** Expand Ombudsman services and Residents' Rights awareness by delivering program brochures to new admissions to every (6) skilled nursing facility in the County.

**Solano** Empowered Aging will focus additional efforts on addressing improper discharges and transfers. Both issues have been demonstrated to lead to an increase in the number of older adults who become homeless or are at an increased risk of becoming homeless.

#### FY 2025-2026

**Outcome of FY 2024-2025 Efforts:**

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

**Napa:** The program delivered brochures to new admissions. The program is working with the Elder Abuse Task Force on a special project to bring awareness and attention to Mandated Reporting, currently generating a comprehensive mailing list for Napa County.

**Solano:** Staff met with discharge planners and staff at the Solano ADRC to discuss discharges and transfers. Empowered Aging is working directly with the ADRC on strengthening the Transitions program. Empowered Aging is focusing on advocacy efforts around the point system in RCFEs to focus on ensuring fair, transparent, and adequate staffing levels, improving quality of care, and meeting the needs of residents. The point system is a method that RCFEs use to determine the level of care and the rate that the facility will be charging the residents, but facilities are not abiding by these measurements, so the Ombudsman is advocating for the residents to ensure they are getting these services.

#### FY 2026-2027

**Outcome of FY 2025-2026 Efforts:**

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

**Napa:** The program will deliver Napa Long-Term Care contact information to all new resident admits during the monthly Ombudsman visits.

**Solano:** In the coming year, the additional staffing with two volunteers and one intern supporting the program strengthens our ability to advocate more effectively for residents and respond to concerns in a timely manner. Increased support will help us to expand our advocacy efforts and provide enhanced assistance to those we serve.

#### FY 2027-2028

**Outcome of 2026-2027 Efforts:**

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

### 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.

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| <p><b>1. Napa:</b> FY 2022-2023</p>  |
| <p>Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint <u>6</u> divided by the total number of Nursing Facilities <u>6</u> = Baseline <u>100%</u></p>                              |
| <p>FY 2024-2025 Target: <u>100%</u></p>  |
| <p><b>Solano:</b> FY 2022-2023</p>   |
| <p>Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint <u>2</u> divided by the total number of Nursing Facilities <u>8</u> = Baseline <u>25 %</u></p>                              |
| <p>FY 2024-2025 Target: <u>100%</u></p>  |
| <p><b>2. Napa:</b> FY 2023-2024 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint <u>6</u> divided by the total number of Nursing Facilities <u>6</u> = Baseline <u>100%</u></p> |
| <p>FY 2025-2026 Target: 85%</p>  |
| <p><b>Solano:</b> FY 2023-2024 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint <u>8</u> divided by the total number of Nursing Facilities <u>8</u> = Baseline <u>100%</u></p>  |
| <p><b>3. Napa:</b> FY 2024-2025 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint ____ divided by the total number of Nursing Facilities ____ = Baseline _____ %</p>             |
| <p>FY 2026-2027 Target: _____</p>  |
| <p><b>Solano:</b> FY 2024-2025 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint <u>X</u> divided by the total number of Nursing Facilities <u>X</u> = Baseline <u>XX%</u></p>   |
| <p>FY 2026-2027 Target: <u>XX%</u></p>   |

4. FY 2025-2026 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint \_\_\_\_ divided by the total number of Nursing Facilities \_\_\_\_ = Baseline \_\_\_\_\_ %  
 FY 2027-2028 Target: \_\_\_\_\_

**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 are visited at least once each quarter, not in response to a complaint about the total number of RCFEs in the PSA. NOTE: This is not a number of visits but a number of facilities. In determining the number of facilities visited for this measure, no RCFE can be counted more than once.

1. **Napa:** FY 2022-2023

Baseline: Number of RCFEs visited at least once a quarter, not in response to a complaint 35 divided by the total number of RCFEs 35= Baseline 100%  
 FY 2024-2025 Target: 100%

**Solano:** FY 2022-2023

Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint 12 divided by the total number of RCFEs 147= Baseline 8%  
 FY 2024-2025 Target: 100%

2. **Napa:** FY 2023-2024 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint 32 divided by the total number of RCFEs 35 = Baseline 91%  
 FY 2025-2026 Target: 100%

**Solano:** FY 2023-2024 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint 80 divided by the total number of RCFEs 155 = Baseline 52%  
 FY 2025-2026 Target: 100%

2. **Napa:** FY 2024-2025 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint \_\_\_\_ divided by the total number of RCFEs \_\_\_\_ = Baseline \_\_\_\_\_ %  
 FY 2026-2027 Target: \_\_\_\_\_

**Solano:** FY 2024-2025 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint XX divided by the total number of RCFEs XX = Baseline XX  
 FY 2026-2027 Target: 100%

4. FY 2025-2026 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint \_\_\_\_ divided by the total number of RCFEs \_\_\_\_ = Baseline \_\_\_\_\_%  
 FY 2027-2028 Target: \_\_\_\_\_

**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 hours 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.

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| <p>1. <b>Napa:</b><br/>         FY 2022-2023 Baseline: 2.62 FTEs<br/>         FY 2024-2025 Target: 2.62 FTEs</p> <p><b>Solano:</b><br/>         FY 2022-2023 Baseline: 2 FTEs<br/>         FY 2024-2025 Target: 2 FTEs</p>     |
| <p>2. <b>Napa:</b><br/>         FY 2023-2024 Baseline: 2.75 FTEs<br/>         FY 2025-2026 Target: 2.75 FTEs</p> <p><b>Solano:</b><br/>         FY 2023-2024 Baseline: 2.0 FTEs<br/>         FY 2025-2026 Target: 2.0 FTEs</p> |
| <p>3. <b>Napa:</b> FY 2024-2025 Baseline: ____ FTEs<br/>         FY 2026-2027 Target: ____ FTEs</p> <p><b>Solano:</b> FY 2024-2025 Baseline: ____ FTEs<br/>         FY 2026-2027 Target: ____ FTEs</p>                         |
| <p>4. FY 2025-2026 Baseline: ____ FTEs<br/>         FY 2027-2028 Target: ____ FTEs</p>   |

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

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|--|
| <p><b>1. Napa:</b><br/> FY 2022-2023 Baseline: Number of certified LTC Ombudsman volunteers <u>6</u><br/> FY 2024-2025 Projected Number of certified LTC Ombudsman volunteers <u>7</u></p> <p><b>Solano:</b><br/> FY 2022-2023 Baseline: Number of certified LTC Ombudsman volunteers <u>0</u> FY<br/> 2024-2025 Projected Number of certified LTC Ombudsman volunteers <u>2</u></p> |
| <p><b>2. Napa:</b><br/> FY 2023-2024 Baseline: Number of certified LTC Ombudsman volunteers <u>4</u><br/> FY 2025-2026 Projected Number of certified LTC Ombudsman volunteers <u>7</u></p> <p><b>Solano:</b><br/> FY 2023-2024 Baseline: Number of certified LTC Ombudsman volunteers <u>0</u><br/> FY 2025-2026 Projected Number of certified LTC Ombudsman volunteers <u>2</u></p> |
| <p><b>3. Napa:</b> FY 2024-2025 Baseline: Number of certified LTC Ombudsman volunteers _____<br/> FY 2026-2027 Projected Number of certified LTC Ombudsman volunteers _____</p> <p><b>Solano:</b> FY 2024-2025 Baseline: Number of certified LTC Ombudsman volunteers _____<br/> FY 2026-2027 Projected Number of certified LTC Ombudsman volunteers _____</p>                       |
| <p><b>4.</b> FY 2025-2026 Baseline: Number of certified LTC Ombudsman volunteers _____<br/> FY 2027-2028 Projected Number of certified LTC Ombudsman volunteers _____</p>  |

**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:**

In narrative format, describe one or more specific efforts your program will undertake in the upcoming year to increase the accuracy, consistency, and timeliness of your National Ombudsman Reporting System (NORS) data reporting.

Some examples could include:

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

**2024**

**Napa:** Initiate new activity review process using training techniques for volunteers at monthly In Service to accurately capture data and document each activity in the NORS reporting system.

**Solano:** The program will continue to recruit new interns and volunteers to help with capacity and to meet OSLTCO standards relating to routine visits, data reporting and case resolution.

## 2025

**Napa:** Initiate new case review process using training techniques for volunteers and staff at monthly In-Service Training to accurately capture data and document each case in the NORS reporting system.

**Solano:** Empowered Aging has hired a new Community Engagement Manager who will be focusing on volunteer recruitment as well as fundraising for the agency. This new position will focus on getting volunteers for Solano County and the other counties which will help meet OSLTCO standards relating to routine visits, data reporting, and case resolution. OSLTCO also has a new Volunteer Coordinator who has been working to get more volunteers across the state for the Long-Term Care Ombudsman Program.

## 2026

**Napa:** Initiate new activities review process to enhance volunteer and staff accuracy in reporting follow up on each complaint in the NORS reporting system.

**Solano:** Empowered Aging will hold monthly meetings to ensure all cases receive appropriate attention and are addressed and closed in a timely manner.

**TITLE VII ELDER ABUSE PREVENTION SERVICE UNIT PLAN**

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

|                                     |   |
|-------------------------------------|---|
| <input type="checkbox"/>            | Ombudsman Program   |
| <input type="checkbox"/>            | Legal Services Provider   |
| <input type="checkbox"/>            | Adult Protective Services   |
| <input checked="" type="checkbox"/> | Other (explain/list)<br>Providence Community Health<br>Napa Valley (Collabria Care) |

## TITLE VII ELDER ABUSE PREVENTION SERVICE UNIT PLAN

The agency receiving Title VII Elder Abuse Prevention funding is Providence Community Health Napa Valley

| Total # of   | 2024-2025   | 2025-2026 | 2026-2027                            | 2027-2028 |
|--|---|-----------|--------------------------------------|-----------|
| Individuals Served                                     | 50  | 50        | 50                                   |           |
| Public Education Sessions                              | 0   | 0         | 0                                    |           |
| Training Sessions for Professionals                    | 0   | 0         | 0                                    |           |
| Training Sessions for Caregivers served by Title III E | 0   | 0         | 0                                    |           |
| Hours Spent Developing a Coordinated System            | 0   | 0         | 0                                    |           |
| Fiscal Year  | Total Copies of Educational Materials to be Distributed |           | Description of Educational Materials |           |
| 2024-2025  | 500   |           | Brochures                            |           |
| 2025-2026  | 500   |           | Brochures                            |           |
| 2026-2027  | 500   |           | Brochures                            |           |
| 2027-2028  |   |           |                                      |           |

# TITLE III E SERVICE UNIT PLAN

## CCR Article 3, Section 7300(d)

### 2024-2028 Four-Year Planning Period

The Title III E Service Unit Plan (SUP) uses the five federally mandated service categories below that encompass 16 subcategories. Refer to the [CDA Service Categories and Data Dictionary](#) for eligible activities and service unit measures:

1. Access Services
2. Information Services
3. Respite Services
4. Supplemental Services
5. Support Services

At least one sub-service category should be provided for each of the five federally mandated service categories. The availability of services for Older Relative Caregivers (ORC) is dependent upon the AAAs individual needs assessment and public hearings.

Use the tables for each service provided and must include the following:

- Specify proposed audience size or units of service for all budgeted area plan funds.
- Providing an associated goal and objective from **Section 7 Area Plan Narrative Goals and Objectives**.

#### Direct and/or Contracted III E Services – Caregivers of Older Adults (COA)

Provided to family caregivers of adults aged 60 and older or of individuals of any age with Alzheimer’s diseases or a related disorder. All service unit reductions of greater than ten percent (10%) from prior Fiscal Year require written justification and approval from CDA.

| SUB-CATEGORIES<br>(16 total)         | 1                                    | 2                             | 3                                  |
|--------------------------------------|--------------------------------------|-------------------------------|------------------------------------|
| Caregivers of Older Adults (COA)     | <i>Proposed<br/>Units of Service</i> | <i>Required<br/>Goal #(s)</i> | <i>Required<br/>Objective #(s)</i> |
| COA Caregiver Access Case Management | Total Hours                          | <i>Required<br/>Goal #(s)</i> | <i>Required<br/>Objective #(s)</i> |
| 2024-2025                            | 0                                    |                               |                                    |
| 2025-2026                            | 0                                    |                               |                                    |
| 2026-2027                            | 0                                    |                               |                                    |
| 2027-2028                            |                                      |                               |                                    |

| <b>COA Caregiver Access Information &amp;</b> | <b>Total Contacts</b>  | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
|---|--|---------------------------|--------------------------------|
| 2024-2025                                     | 300  | 5                         | 5.1                            |
| 2025-2026                                     | 300  | 5                         | 5.1                            |
| 2026-2027                                     | 300  | 5                         | 5.1                            |
| 2027-2028                                     |  |                           |                                |
| <b>COA Caregiver Information Services</b>     | <b># Of activities:<br/>Total est. audience<br/>for above:</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025                                     | # Of activities:0<br>Total est. audience<br>for above:         |                           |                                |
| 2025-2026                                     | # Of activities:0<br>Total est. audience<br>for above:         |                           |                                |
| 2026-2027                                     | # Of activities:0<br>Total est. audience<br>for above:         |                           |                                |
| 2027-2028                                     | # Of activities:<br>Total est. audience<br>for above:          |                           |                                |
| <b>COA Caregiver Support Training</b>         | <b>Total Hours</b>   | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025                                     | 0  |                           |                                |
| 2025-2026                                     | 0  |                           |                                |
| 2026-2027                                     | 0  |                           |                                |
| 2027-2028                                     |  |                           |                                |
| <b>COA Caregiver Support Groups</b>           | <b>Total Sessions</b>  | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025                                     | 250  | 5                         | 5.1                            |
| 2025-2026                                     | 250  | 5                         | 5.1                            |
| 2026-2027                                     | 250  | 5                         | 5.1                            |
| 2027-2028                                     |  |                           |                                |

| <b>COA Caregiver Support Counseling</b>                 | <b>Total Hours</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
|---|--------------------|---------------------------|--------------------------------|
| 2024-2025   | 431                | 5                         | 5.1                            |
| 2025-2026   | 431                | 5                         | 5.1                            |
| 2026-2027   | 431                | 5                         | 5.1                            |
| 2027-2028   |                    |                           |                                |
| <b>COA Caregiver Respite In-Home</b>                    | <b>Total Hours</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                  |                           |                                |
| 2025-2026   | 3,000              | 5                         | 5.1                            |
| 2026-2027   | 3,000              | 5                         | 5.1                            |
| 2027-2028   |                    |                           |                                |
| <b>COA Caregiver Respite Out-of-Home Day Care</b>       | <b>Total Hours</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 2,000              | 5                         | 5.1                            |
| 2025-2026   | 2,000              | 5                         | 5.1                            |
| 2026-2027   | 2,000              | 5                         | 5.1                            |
| 2027-2028   |                    |                           |                                |
| <b>COA Caregiver Respite Out-of-Home Overnight Care</b> | <b>Total Hours</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                  |                           |                                |
| 2025-2026   | 0                  |                           |                                |
| 2026-2027   | 0                  |                           |                                |
| 2027-2028   |                    |                           |                                |
| <b>COA Caregiver Respite Other</b>                      | <b>Total Hours</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                  |                           |                                |
| 2025-2026   | 0                  |                           |                                |
| 2026-2027   | 0                  |                           |                                |

|   |                          |                           |                                |
|---|--------------------------|---------------------------|--------------------------------|
| 2027-2028   |                          |                           |                                |
| <b>COA Caregiver Supplemental Services Legal Consultation</b>     | <b>Total Contacts</b>    | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                        |                           |                                |
| 2025-2026   | 0                        |                           |                                |
| 2026-2027   | 0                        |                           |                                |
| 2027-2028   |                          |                           |                                |
| <b>COA Caregiver Supplemental Services Consumable Supplies</b>    | <b>Total Occurrences</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                        |                           |                                |
| 2025-2026   | 0                        |                           |                                |
| 2026-2027   | 0                        |                           |                                |
| 2027-2028   |                          |                           |                                |
|   |                          |                           |                                |
| <b>COA Caregiver Supplemental Services Home Modifications</b>     | <b>Total Occurrences</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                        |                           |                                |
| 2025-2026   | 0                        |                           |                                |
| 2026-2027   | 0                        |                           |                                |
| 2027-2028   |                          |                           |                                |
| <b>COA Caregiver Supplemental Services Assistive Technologies</b> | <b>Total Occurrences</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                        |                           |                                |
| 2025-2026   | 0                        |                           |                                |
| 2026-2027   | 0                        |                           |                                |
| 2027-2028   |                          |                           |                                |

| COA Caregiver Supplemental Services Caregiver Assessment | Total Hours       | Required Goal #(s) | Required Objective #(s) |
|--|-------------------|--------------------|-------------------------|
| 2024-2025  | 367               | 5                  | 5.1                     |
| 2025-2026  | 367               | 5                  | 5.1                     |
| 2026-2027  | 367               | 5                  | 5.1                     |
| 2027-2028  |                   |                    |                         |
| COA Caregiver Supplemental Services Caregiver Registry   | Total Occurrences | Required Goal #(s) | Required Objective #(s) |
| 2024-2025  | 0                 |                    |                         |
| 2025-2026  | 0                 |                    |                         |
| 2026-2027  | 0                 |                    |                         |
| 2027-2028  |                   |                    |                         |

**Direct and/or Contracted IIIE Services- Older Relative Caregivers (ORC)**

| SUB-CATEGORIES (16 total)                     | 1                                | 2                         | 3                              |
|---|----------------------------------|---------------------------|--------------------------------|
| <b>Older Relative Caregivers (ORC)</b>        | <i>Proposed Units of Service</i> | <i>Required Goal #(s)</i> | <i>Required Objective #(s)</i> |
| <b>ORC Caregiver Access Case Management</b>   | <b>Total Hours</b>               | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025                                     | 0                                |                           |                                |
| 2025-2026                                     | 0                                |                           |                                |
| 2026-2027                                     | 0                                |                           |                                |
| 2027-2028                                     |                                  |                           |                                |
| <b>ORC Caregiver Access Information &amp;</b> | <b>Total Hours</b>               | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025                                     | 320                              | 5                         | 5.1                            |
| 2025-2026                                     | 320                              | 5                         | 5.1                            |
| 2026-2027                                     | 320                              | 5                         | 5.1                            |
| 2027-2028                                     |                                  |                           |                                |

| <b>ORC Caregiver Information Services</b> | <b># Of activities:<br/>Total est. audience<br/>for above:</b> | <b>Required<br/>Goal #(s)</b> | <b>Required<br/>Objective #(s)</b> |
|---|--|-------------------------------|------------------------------------|
| 2024-2025                                 | # Of activities:3<br>Total est. audience<br>for above:60       | 5                             | 5.1                                |
| 2025-2026                                 | # Of activities: 3<br>Total est. audience<br>for above: 60     | 5                             | 5.1                                |
| 2026-2027                                 | # Of activities:3<br>Total est. audience<br>for above:60       | 5                             | 5.1                                |
| 2027-2028                                 | # Of activities:<br>Total est. audience<br>for above:          |                               |                                    |
| <b>ORC Caregiver Support Training</b>     | <b>Total Hours</b>   | <b>Required<br/>Goal #(s)</b> | <b>Required<br/>Objective #(s)</b> |
| 2024-2025                                 | 0  |                               |                                    |
| 2025-2026                                 | 0  |                               |                                    |
| 2026-2027                                 | 0  |                               |                                    |
| 2027-2028                                 |  |                               |                                    |
|   |  |                               |                                    |
| <b>ORC Caregiver Support Groups</b>       | <b>Total Sessions</b>  | <b>Required<br/>Goal #(s)</b> | <b>Required<br/>Objective #(s)</b> |
| 2024-2025                                 | 0  |                               |                                    |
| 2025-2026                                 | 0  |                               |                                    |
| 2026-2027                                 | 0  |                               |                                    |
| 2027-2028                                 |  |                               |                                    |
| <b>ORC Caregiver Support Counseling</b>   | <b>Total Hours</b>   | <b>Required<br/>Goal #(s)</b> | <b>Required<br/>Objective #(s)</b> |
| 2024-2025                                 | 0  |                               |                                    |
| 2025-2026                                 | 0  |                               |                                    |
| 2026-2027                                 | 0  |                               |                                    |
| 2027-2028                                 |  |                               |                                    |

|   |                       |                           |                                |
|---|-----------------------|---------------------------|--------------------------------|
| <b>ORC Caregiver Respite In-Home</b>                          | <b>Total Hours</b>    | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                     |                           |                                |
| 2025-2026   | 0                     |                           |                                |
| 2026-2027   | 0                     |                           |                                |
| 2027-2028   |                       |                           |                                |
| <b>ORC Caregiver Respite Out-of-Home Day Care</b>             | <b>Total Hours</b>    | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                     |                           |                                |
| 2025-2026   | 0                     |                           |                                |
| 2026-2027   | 0                     |                           |                                |
| 2027-2028   |                       |                           |                                |
| <b>ORC Caregiver Respite Out-of-Home Overnight Care</b>       | <b>Total Hours</b>    | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                     |                           |                                |
| 2025-2026   | 0                     |                           |                                |
| 2026-2027   | 0                     |                           |                                |
| 2027-2028   |                       |                           |                                |
| <b>ORC Caregiver Respite Other</b>                            | <b>Total Hours</b>    | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                     |                           |                                |
| 2025-2026   | 0                     |                           |                                |
| 2026-2027   | 0                     |                           |                                |
| 2027-2028   |                       |                           |                                |
| <b>ORC Caregiver Supplemental Services Legal Consultation</b> | <b>Total Contacts</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                     |                           |                                |
| 2025-2026   | 0                     |                           |                                |
| 2026-2027   | 0                     |                           |                                |

|   |                          |                           |                                |
|---|--------------------------|---------------------------|--------------------------------|
| 2027-2028   |                          |                           |                                |
| <b>ORC Caregiver Supplemental Services Consumable Supplies</b>    | <b>Total Occurrences</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                        |                           |                                |
| 2025-2026   | 0                        |                           |                                |
| 2026-2027   | 0                        |                           |                                |
| 2027-2028   |                          |                           |                                |
| <b>ORC Caregiver Supplemental Services Home Modifications</b>     | <b>Total Occurrences</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                        |                           |                                |
| 2025-2026   | 0                        |                           |                                |
| 2026-2027   | 0                        |                           |                                |
| 2027-2028   |                          |                           |                                |
| <b>ORC Caregiver Supplemental Services Assistive Technologies</b> | <b>Total Occurrences</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                        |                           |                                |
| 2025-2026   | 0                        |                           |                                |
| 2026-2027   | 0                        |                           |                                |
| 2027-2028   |                          |                           |                                |

|   |                          |                           |                                |
|---|--------------------------|---------------------------|--------------------------------|
| <b>ORC Caregiver Supplemental Services Caregiver Assessment</b> | <b>Total Hours</b>       | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |
| 2024-2025   | 0                        |                           |                                |
| 2025-2026   | 0                        |                           |                                |
| 2026-2027   | 0                        |                           |                                |
| 2027-2028   |                          |                           |                                |
| <b>ORC Caregiver Supplemental Services Caregiver Registry</b>   | <b>Total Occurrences</b> | <b>Required Goal #(s)</b> | <b>Required Objective #(s)</b> |

|                  |          |  |  |
|------------------|----------|--|--|
| <b>2024-2025</b> | <b>0</b> |  |  |
| <b>2025-2026</b> | <b>0</b> |  |  |
| <b>2026-2027</b> | <b>0</b> |  |  |
| <b>2027-2028</b> |          |  |  |

# 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):** Area Agencies on Aging (AAA) that are represented by a multi-PSA, HICAPs must coordinate with their “Managing” AAA to complete their respective PSA’s HICAP Service Unit Plan.

CDA contracts with 26 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 PAID LEGAL SERVICES:** Complete this section if HICAP Legal Services are included in the approved HICAP budget.

**STATE & FEDERAL PERFORMANCE TARGETS:** HICAP is assessed based on State and Federal Performance Measures. AAAs should set targets in the service unit plan that meet or improve on each PM

Contact **CDA.HICAP@aging.ca.gov** for guidance on annual HICAP performance measure targets and definitions

HICAP PMs are calculated from county-level data for all 33 PSAs. HICAP State and Federal PMs, include:

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

- PM 2.5 Enrollment Contacts: Percentage of contacts with one or more qualifying enrollment topics discussed

HICAP service-level data are reported in CDA’s Statewide HICAP Automated Reporting Program (SHARP) system per reporting requirements.

**SECTION 1: STATE PERFORMANCE MEASURES**

| HICAP Fiscal Year (FY) | PM 1.1 Clients Counseled (Estimated)             | Goal Numbers |
|------------------------|--|--------------|
| 2024-2025              | Sonoma County AAA is the lead agency for HICAP   |              |
| 2025-2026              | Napa: 185<br>Solano: 361                         | 546          |
| 2026-2027              |  |              |
| 2027-2028              |  |              |
| HICAP Fiscal Year (FY) | PM 1.2 Public and Media Events (PAM) (Estimated) | Goal Numbers |
| 2024-2025              | Sonoma County AAA is the lead agency for HICAP   |              |
| 2025-2026              | Napa:17<br>Solano: 21                            | 38           |
| 2026-2027              |  |              |
| 2027-2028              |  |              |

**SECTION 2: FEDERAL PERFORMANCE MEASURES**

| HICAP Fiscal Year (FY) | PM 2.1 Client Contacts (Interactive)           | Goal Numbers   |
|------------------------|--|--|
| 2024-2025              | Sonoma County AAA is the lead agency for HICAP |  |
| 2025-2026              | Napa: 359<br>Solano: 785                       | Minimum Target Penetration Count<br>1144<br>Improvement Target Penetration Count<br>2557 |

| HICAP Fiscal Year (FY) | PM 2.1 Client Contacts (Interactive)           | Goal Numbers  |
|------------------------|--|---|
| 2026-2027              |  |   |
| 2027-2028              |  |   |
| HICAP Fiscal Year (FY) | PM 2.2 PAM Outreach (Interactive)              | Goal Numbers  |
| 2024-2025              | Sonoma County AAA is the lead agency for HICAP |   |
| 2025-2026              | Napa: 359<br>Solano: 785                       | Minimum Target Penetration Count 580<br>Improvement Target Penetration Count 4959 |
| 2026-2027              |  |   |
| 2027-2028              |  |   |

| HICAP Fiscal Year (FY) | PM 2.3 Medicare Beneficiaries Under 65         | Goal Numbers   |
|------------------------|--|--|
| 2024-2025              | Sonoma County AAA is the lead agency for HICAP |  |
| 2025-2026              | Napa: 29<br>Solano: 101                        | Minimum Target Penetration Count 129<br>Improvement Target Penetration Count 266 |
| 2026-2027              |  |  |
| 2027-2028              |  |  |

| HICAP Fiscal Year (FY) | PM 2.4 Hard to Reach (Total) | PM 2.4a LIS | PM 2.4b Rural | PM 2.4c ESL | Goal Numbers |
|------------------------|------------------------------|-------------|---------------|-------------|--------------|
| 2024-2025              | Sonoma County AAA is         |             |               |             |              |

| HICAP Fiscal Year (FY) | PM 2.4 Hard to Reach (Total)                   | PM 2.4a LIS | PM 2.4b Rural | PM 2.4c ESL | Goal Numbers  |
|------------------------|--|-------------|---------------|-------------|---|
|                        | the lead agency for HICAP                      |             |               |             |   |
| 2025-2026              | Sonoma County AAA is the lead agency for HICAP | 273-741     | 0             | 39-867      | Minimum Target Penetration Count 312<br>Improvement Target Penetration Count 1608 |
| 2026-2027              |  |             |               |             |   |
| 2027-2028              |  |             |               |             |   |

| HICAP Fiscal Year (FY) | PM 2.5 Enrollment Contacts (Qualifying)        | Goal Numbers   |
|------------------------|--|--|
| 2024-2025              | Sonoma County AAA is the lead agency for HICAP |  |
| 2025-2026              | Napa: 366<br>Solano: 776                       | Minimum Target Penetration Count 1142<br>Improvement Target Penetration Count 3532 |
| 2026-2027              |  |  |
| 2027-2028              |  |  |

| <b>HICAP Fiscal Year (FY)</b> | <b>PM 3.1 Estimated Number of Clients Represented Per FY (Unit of Service)</b>        | <b>Goal Numbers</b> |
|-------------------------------|---|---------------------|
| 2024-2025                     | Sonoma County AAA is the lead agency for HICAP  |                     |
| 2025-2026                     | Sonoma County AAA is the lead agency for HICAP  |                     |
| 2026-2027                     |   |                     |
| 2027-2028                     |   |                     |
| <b>HICAP Fiscal Year (FY)</b> | <b>PM 3.2 Estimated Number of Legal Representation Hours Per FY (Unit of Service)</b> | <b>Goal Numbers</b> |
| 2024-2025                     | Sonoma County AAA is the lead agency for HICAP  |                     |
| 2025-2026                     | Sonoma County AAA is the lead agency for HICAP  |                     |
| 2026-2027                     |   |                     |
| 2027-2028                     |   |                     |
| <b>HICAP Fiscal Year (FY)</b> | <b>PM 3.3 Estimated Number of Program Consultation Hours Per FY (Unit of Service)</b> | <b>Goal Numbers</b> |
| 2024-2025                     | Sonoma County AAA is the lead agency for HICAP  |                     |
| 2025-2026                     | Sonoma County AAA is the lead agency for HICAP  |                     |
| 2026-2027                     |   |                     |
| 2027-2028                     |   |                     |

## **SECTION 9. SENIOR CENTERS & FOCAL POINTS**

### **COMMUNITY SENIOR CENTERS AND FOCAL POINTS LIST**

CCR Title 22, Article 3, Section 7302(a)(14), 45 CFR Section 1321.53(c), Older Americans Act Reauthorization Act of 2020, Section 306(a) and 102(21)(36)

In the form below, provide the current list of designated community senior centers and focal points with addresses.

| <b>Designated Community Focal Point</b>         | <b>Address</b>                                      |
|---|---|
| Solano Aging and Disability Resource Connection | 450 Chadbourne Road, Suite D<br>Fairfield, CA 94534 |
| Comprehensive Services for Older Adults         | 650 Imperial Way, Suite 101<br>Napa, CA 94559       |
| Joseph Nelson Community Center                  | 611 Village Drive<br>Suisun City, CA 94585          |

| <b>Senior Center</b>                    | <b>Address</b>                               |
|---|--|
| American Canyon Senior Center           | 2185 Elliot Dr.<br>American Canyon, CA 94503 |
| Napa Senior Center                      | 1500 Jefferson St.<br>Napa, CA 94559         |
| St. Helena Senior Center (Rianda House) | 1475 Main St.<br>St. Helena, CA 94574        |
| Benicia Senior Center                   | 1201 East 2nd St.,<br>Benicia, CA 94510      |
| Florence Douglas Center (Vallejo)       | 333 Amador St.,<br>Vallejo, CA 94590         |
| Fairfield Adult Recreation Center       | 1200 Civic Center Dr.<br>Fairfield, CA 94533 |
| Vacaville Senior Center (McBride)       | 91 Town Square Pl.<br>Vacaville, CA 95688    |
| Dixon Senior Center                     | 201 S. 5th St.<br>Dixon, CA 95620            |
| Rio Vista Senior Center                 | 25 Main St.<br>Rio Vista, CA 94571           |

## SECTION 10. FAMILY CAREGIVER SUPPORT PROGRAM

### 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) 2024-2028 Four-Year Planning Cycle

Based on the AAA's needs assessment and subsequent review of current support needs and services for **family caregivers**, indicate what services the AAA **intends** to provide using Title III-E and/or matching FCSP funds for both. This must be completed and updated annually.

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

#### Caregiver of Older Adult (COA) Services

Provided to family caregivers of adults aged 60 and older or of individuals of any age with Alzheimer's diseases or a related disorder.

| Category  | 2024-2025  | 2025-2026  | 2026-2027  | 2027-2028   |
|---|--|--|--|---|
| <b>Caregiver Access</b><br><input type="checkbox"/> Case Management<br><input checked="" type="checkbox"/> Information and Assistance   | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input type="checkbox"/> Yes Contract<br><input type="checkbox"/> No |
| <b>Caregiver Information Services</b><br><input checked="" type="checkbox"/> Information Services   | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input type="checkbox"/> Yes Contract<br><input type="checkbox"/> No |
| <b>Caregiver Support</b><br><input type="checkbox"/> Training<br><input checked="" type="checkbox"/> Support Groups<br><input checked="" type="checkbox"/> Counseling               | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input type="checkbox"/> Yes Contract<br><input type="checkbox"/> No |
| <b>Caregiver Respite</b><br><input checked="" type="checkbox"/> In Home<br><input type="checkbox"/> Out of Home (Day)<br><input type="checkbox"/> Out of Home (Overnight)<br>Other: | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input checked="" type="checkbox"/> Yes Contract<br><input type="checkbox"/> No | <input type="checkbox"/> Yes Direct<br><input type="checkbox"/> Yes Contract<br><input type="checkbox"/> No |

| Category   | 2024-2025  | 2025-2026  | 2026-2027  | 2027-2028                             |
|--|--|--|--|---------------------------------------|
| <b>Caregiver Supplemental</b>                          | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct   |
| <input type="checkbox"/> Legal Consultation            | <input checked="" type="checkbox"/> Yes Contract | <input checked="" type="checkbox"/> Yes Contract | <input checked="" type="checkbox"/> Yes Contract | <input type="checkbox"/> Yes Contract |
| <input type="checkbox"/> Consumable Supplies           | <input type="checkbox"/> No                      | <input type="checkbox"/> No                      | <input type="checkbox"/> No                      | <input type="checkbox"/> No           |
| <input type="checkbox"/> Home Modifications            |  |  |  |                                       |
| <input type="checkbox"/> Assistive Technology          |  |  |  |                                       |
| <input checked="" type="checkbox"/> Other (Assessment) |  |  |  |                                       |
| <input type="checkbox"/> Other (Registry)              |  |  |  |                                       |

### Older Relative Caregiver (ORC) Services

| Category   | 2024-2025  | 2025-2026  | 2026-2027  | 2027-2028                             |
|--|--|--|--|---------------------------------------|
| <b>Caregiver Access</b>  | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct   |
| <input type="checkbox"/> Case Management                       | <input checked="" type="checkbox"/> Yes Contract | <input checked="" type="checkbox"/> Yes Contract | <input checked="" type="checkbox"/> Yes Contract | <input type="checkbox"/> Yes Contract |
| <input checked="" type="checkbox"/> Information and Assistance | <input type="checkbox"/> No                      | <input type="checkbox"/> No                      | <input type="checkbox"/> No                      | <input type="checkbox"/> No           |
| <b>Caregiver Information Services</b>                          | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct   |
| <input checked="" type="checkbox"/> Information Services       | <input checked="" type="checkbox"/> Yes Contract | <input checked="" type="checkbox"/> Yes Contract | <input checked="" type="checkbox"/> Yes Contract | <input type="checkbox"/> Yes Contract |
|  | <input type="checkbox"/> No                      | <input type="checkbox"/> No                      | <input type="checkbox"/> No                      | <input type="checkbox"/> No           |
| <b>Caregiver Support</b>                                       | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct   |
| <input type="checkbox"/> Training                              | <input type="checkbox"/> Yes Contract            | <input type="checkbox"/> Yes Contract            | <input type="checkbox"/> Yes Contract            | <input type="checkbox"/> Yes Contract |
| <input type="checkbox"/> Support Groups                        | <input checked="" type="checkbox"/> No           | <input checked="" type="checkbox"/> No           | <input checked="" type="checkbox"/> No           | <input type="checkbox"/> No           |
| <input type="checkbox"/> Counseling                            |  |  |  |                                       |
| <b>Caregiver Respite</b>                                       | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct   |
| <input type="checkbox"/> In Home                               | <input type="checkbox"/> Yes Contract            | <input type="checkbox"/> Yes Contract            | <input type="checkbox"/> Yes Contract            | <input type="checkbox"/> Yes Contract |
| <input type="checkbox"/> Out of Home (Day)                     | <input checked="" type="checkbox"/> No           | <input checked="" type="checkbox"/> No           | <input checked="" type="checkbox"/> No           | <input type="checkbox"/> No           |
| <input type="checkbox"/> Out of Home (Overnight)               |  |  |  |                                       |
| <input type="checkbox"/> Other:                                |  |  |  |                                       |
| <b>Caregiver Supplemental</b>                                  | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct              | <input type="checkbox"/> Yes Direct   |
| <input type="checkbox"/> Legal Consultation                    | <input type="checkbox"/> Yes Contract            | <input type="checkbox"/> Yes Contract            | <input type="checkbox"/> Yes Contract            | <input type="checkbox"/> Yes Contract |
| <input type="checkbox"/> Consumable Supplies                   | <input checked="" type="checkbox"/> No           | <input checked="" type="checkbox"/> No           | <input checked="" type="checkbox"/> No           | <input type="checkbox"/> No           |
| <input type="checkbox"/> Home Modifications                    |  |  |  |                                       |
| <input type="checkbox"/> Assistive Technology                  |  |  |  |                                       |
| <input type="checkbox"/> Other (Assessment)                    |  |  |  |                                       |

**Justification:** If any of the five main categories are **NOT** being provided, please explain how the need is already being met in the PSA. If the justification information is the same, multiple service categories can be grouped in the justification statement. The justification must include the following:

1. Provider name and address:
  - Innovative Health Solutions PO Box 183 Benicia, CA 94510
2. Description of the services(s) they provide (services should match those in the CDA Service Category and Data Dictionary):
  - IIIIE Older Relative program provides a robust kinship program for Solano County. FosterLuv Kinship, a 30-year-old program based at Solano Community College, is the subcontractor.
  - Napa County still lacks a provider.
3. Where is the service provided (entire PSA, certain counties, etc.)?
  - Entire PSA
4. How does the AAA ensure that the service continues to be provided in the PSA without the use of Title IIIIE funds?
  - This agency is listed in our Information and Assistance Resource File as a non-OAA community-based organization. The AAA updates the I&A resource file annually. During this process, the AAA calls the agency to confirm information is still accurate and up to date.
5. Additional referrals for Supplemental Services are made to multiple service providers including:
  - ADRC: 450 Chadbourne Road, Suite D, Fairfield, CA 94533 (Solano)
  - Benicia Family Resource Center: 150 East K Street, Benicia, CA 94510 (Solano)
  - Share the Care Napa Valley: 162 S. Coombs Street, Napa, CA 94559 (Napa)
  - All of these organizations have funding available to support supplemental services if needed. Examples of supplemental services include fall prevention assistive devices, home modifications, or emergency alert devices.

**Note:** The AAA is responsible for ensuring that the information listed for these organizations is up to date. Please include any updates in the Area Plan Update process.

## **SECTION 11. LEGAL ASSISTANCE**

### **2024-2028 Four-Year Area Planning Cycle**

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

**Discuss:** The percentage of Title IIIB funding allocated is 11%.

**2025:** Title IIIB funding percentage is unchanged.

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

**Discuss:** Local needs have not changed in the past year.

**2025:** No change in local needs

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?

**Discuss:** The AAA and LSP/Legal Services of Northern California (LSNC) contract for services requires use of the California Statewide Guidelines for OAA Legal Services. In reviewing the section on Area Agency on Aging Roles and Responsibilities, we confirmed that our contract embraces these principles of how seniors should be treated in the legal services arena. There is a grievance procedure, but no surveys are used as this would violate consumer confidentiality.

**2025:** No change

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?

**Discuss:** The AAA and the LSP/LSNC collaborate to identify priority issues for legal services based on the current needs assessment, community responses and legal services provider experience/service demands. The top 4 priorities are housing instability and lack of affordable housing; access to/maintenance of public benefits; elder abuse prevention and response; consumer issues.

**2025:** No change in local priorities.

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?

**Discuss:** Collaboration with the LSP/LSNC occurs through RFP terms and contract negotiations. The targeted population and mechanism for reaching targeted

groups includes targeting vulnerable older adults who face the greatest social or economic need. The LSP/LSNC screens callers for eligibility (age and residence) and gathers financial information. The LSP/LSNC does not turn away older adults due to income levels, however, the LSP/LSNC may provide more extensive services to low-income adults who would not be able to afford assistance from other sources. The decisions on the level of service the LSP/LSNC provides to a client are made by the Managing Attorney at the office's weekly case review meeting.

**2025:** No change

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

| Fiscal Year | # of Legal Assistance Services Providers | Did the number of service providers change? If so, please explain |
|-------------|--|---|
| 2024-2025   | 1  | N/A   |
| 2025-2026   | 1  |   |
| 2026-2027   | 1  |   |
| 2027-2028   |  |   |

<sup>12</sup> For Information related to Legal Services, contact Jeremy A. Avila at 916 419-7500 or [Jeremy.Avila@aging.ca.gov](mailto:Jeremy.Avila@aging.ca.gov)

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

**Discuss:** The LSP/LSNC uses multiple forms of outreach. Community partner outreach includes creating referral partnerships with community partners who serve older adults.

Working with senior centers to share information. The LSP/LSNC attend community events for older adults. Additionally, flyers/other materials about LSNC's services are distributed to community partners so they are available to older adults throughout various communities. The LSP/LSNC staff attend community meetings on topics relevant to legal issues of older adults. LSP/LSNC participates in Multi-Disciplinary Teams (MDT) in both counties.

**2025:** LSNC conducts place-based outreaches to underserved areas of each County (such as Up-Valley in Napa and Eastern Solano County).

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

| Fiscal Year | Name of Provider | Geographic Region covered |
|-------------|------------------|---------------------------|
|-------------|------------------|---------------------------|

|                  |                                       |                |
|------------------|---------------------------------------|----------------|
| <b>2024-2025</b> | Legal Services of Northern California | Napa & Solano  |
| <b>2025-2026</b> | Legal Services of Northern California | Napa & Solano  |
| <b>2026-2027</b> | Legal Services of Northern California | Napa & Solano  |
| <b>2027-2028</b> | a.<br>b.<br>c.                        | a.<br>b.<br>c. |

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.).

**Discuss:** Most clients reach LSNC by either calling the office or coming to the office in person. LSNC offers both remote and in-person appointments. Additionally, if a client has a need to get paperwork to the LSP (e.g., documents for review or documents the client needs to sign), but the client does not use technology and is homebound, LSNC staff will make a home visit to accommodate those needs. Some legal services clients reach LSNC through referrals from community partners. In these situations, staff does a “warm hand off” so the client can have as easy of a transition as possible from the referring agency to the LSP. LSNC holds virtual clinics, such as an estate planning clinic. In this situation, LSNC works with clients ahead of time to get documents and answers to questions about their estate planning goals. Then, virtual appointments are scheduled with the pro bono attorney through the clinic. LSNC has encountered situations when a client prefers communication in writing, such as email, (e.g., due to hearing impairment), and those requests are accommodated.

**2025:** No change.

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).

**Discuss:** LSNC handles landlord/tenant matters including evictions, repair issues, subsidized housing issues and more. LSNC also handles public benefits issues including IHSS eligibility and number of assessed IHSS hours, CalFRESH, Medi-Cal, Social Security matters. Additionally, LSNC handles health care matters including Medi-Cal eligibility and denial of services under Medi-Cal. LSNC handles a number of elder abuse matters including restraining orders. LSNC also assists clients with consumer issues including credit card debts, credit counseling, and homeownership.

**2025:** LSNC assists older adults with issues related to homeownership including foreclosure,

loan modifications, homeowners' insurance, HOA disputes, and more.

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

**Discuss:** Barriers include knowledge of the services LSNC provides, and the services not provided. The strategy for addressing this barrier is to continue current outreach activities, including expanded office hours in senior centers and in low-income areas. In particular outreach in isolated areas such as UpValley Napa County is important. Additionally, presentations about legal services will be made to service groups and faith communities. Coordination with the Solano ADRC will also assist with accurate knowledge of legal services. LSNC will make presentations at Lunch and Learn events at congregate dining location. LSNC staff will continue to attend community meetings to share information about available legal services. Another barrier to accessing legal assistance is missing appointments. The strategy for addressing this barrier is to implement an appointment reminder system that will contact clients with a reminder the day prior to their appointment. Also, if a client does not show up for an in-person appointment, LSNC will implement protocols to call the client and conduct the interview by phone, if necessary.

**2025:** No change

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

**Discuss:** LSNC coordinates services with the local Multi-Disciplinary Teams (MDTs) for both Solano and Napa. LSNC also coordinates services with local health care centers and clinics (e.g., La Clinica). Additionally important is coordination with other service providers including HICAP, Meals on Wheels, Independent Living Resources, and the Ombudsman, for example, and advocacy groups, such as Fair Housing Advocates of Northern California and Fair Housing Napa Valley and the Farm Workers Bureau.

**2025:** No change

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## **SECTION 11. LEGAL ASSISTANCE (Revised 2026)**

1. Based on your local needs assessment, what percentage of Title IIIB funding is allocated to legal services?
2. The percentage of Title IIIB funding allocated is 11%.
3. Does the LSP(s) in your area solicit voluntary contributions or donations from recipients? If yes, considering 42 U.S.C. § 3030c-2(b), please describe the manner in which the funds are solicited, and describe how the funds support the expansion of legal services in your PSA.
4. Please indicate whether the AAA provides the LSP(s) a copy or link to the California Statewide Guidelines for Legal Assistance. How does the AAA monitor and/or support the LSP's implementation of the statewide guidelines?
5. The AAA and LSP/Legal Services of Northern California (LSNC) contract for services requires use of the California Statewide Guidelines for OAA Legal Services. In reviewing the section on Area Agency on Aging Roles and Responsibilities, we confirmed that our contract embraces these principles of how seniors should be treated in the legal services arena. There is a grievance procedure, but no surveys are used as this would violate consumer confidentiality. Legal Services is monitored annually by AAA staff.
6. Please describe the partnership work between the AAA and the LSP(s) (e.g., quarterly meetings, coordinated outreach efforts, etc.)? Please identify any topics, priorities, and/or trainings addressed in your discussions.
7. Collaboration with the LSP/LSNC occurs through RFP terms and contract negotiations. The targeted population and mechanism for reaching targeted groups includes targeting vulnerable older adults who face the greatest social or economic need.
8. What are the top four (4) legal areas the LSP(s) prioritizes in your PSA? Do the AAA and LSP(s) jointly work to identify the priority areas?
9. Landlord/tenant; Public benefits; Health care; Consumer issues including elder abuse/fraud/scams.
10. Please describe any trends or changes in your local needs over the past year(s). What resources (e.g., funding, education, training, etc.) have been allocated to accommodate any changes in the local needs or trends?
11. LSNC has faced decreased funding from its primary funder (federal – Legal Services Corporation). LSNC's funding from the AAA for older adult legal services has decreased, but our personnel and other expenses have increased.
12. What are the target groups in your PSA? Do the AAA and LSP(s) jointly work to identify the target groups?

13. Target groups are older adults in the greatest social and economic need. The targets are identified through the Area Plan and contract with service providers.
14. What methods of outreach are the LSP(s) using to reach the target groups?
15. LSNC has a strong relationship with Napa APS. LSNC has been focusing on strengthening its relationship with Solano APS. LSNC presented to Solano APS workers at their staff meeting in February 2026 with the goal of increasing cooperation and referrals between the two agencies.
16. 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.). Most clients reach LSNC by either calling the office or coming to the office in person. LSNC offers both remote and in-person appointments. Additionally, if a client has a need to get paperwork to the LSP (e.g., documents for review or documents the client needs to sign), but the client does not use technology and is homebound, LSNC staff will make a home visit to accommodate those needs. Some legal services clients reach LSNC through referrals from community partners. In these situations, staff does a “warm hand off” so the client can have as easy of a transition as possible from the referring agency to the LSP. LSNC holds virtual clinics, such as an estate planning clinic. In this situation, LSNC works with clients ahead of time to get documents and answers to questions about their estate planning goals. Then, virtual appointments are scheduled with the pro bono attorney through the clinic. LSNC has encountered situations when a client prefers communication in writing, such as email, (e.g., due to hearing impairment), and those requests are accommodated.
17. What are the barriers to accessing legal services in your PSA? Include proposed strategies for overcoming such barriers. Barriers include knowledge of the services LSNC provides, and the services not provided. The strategy for addressing this barrier is to continue current outreach activities, including expanded office hours in senior centers and in low-income areas. In particular outreach in isolated areas such as UpValley Napa County is important. Additionally, presentations about legal services will be made to service groups and faith communities. Coordination with the Solano ADRC will also assist with accurate knowledge of legal services. LSNC will make presentations at Lunch and Learn events at congregate dining location. LSNC staff will continue to attend community meetings to share information about available legal services. Another barrier to accessing legal assistance is missing appointments. The strategy for addressing this barrier is to implement an appointment reminder system that will contact clients with a reminder the day prior to their appointment. Also, if a client does not show up for an in-person appointment, LSNC will implement protocols to call the client and conduct the interview by phone, if necessary. LSNC is targeting outreach to various community partners in Solano and Napa Counties to increase community awareness about LSNC’s services.

18. What geographic regions are covered by each provider? There is one Legal Service provider for both Napa and Solano counties.

Complete table below:

| Fiscal Year | Name of Provider                      | Geographic Region covered |
|-------------|---------------------------------------|---------------------------|
| 2024-2025   | Legal Services of Northern California | Napa & Solano             |
| 2025-2026   | Legal Services of Northern California | Napa & Solano             |
| 2026-2027   | Legal Services of Northern California | Napa & Solano             |
| 2027-2028   | a.<br>b.<br>c.                        | a.<br>b.<br>c.            |

19. What geographic regions are covered by each LSP? Complete the table below.

| Fiscal Year | Name of Provider                      | Geographic Region covered |
|-------------|---------------------------------------|---------------------------|
| 2024-2025   | Legal Services of Northern California | Napa & Solano             |
| 2025-2026   | Legal Services of Northern California | Napa & Solano             |
| 2026-2027   | Legal Services of Northern California | Napa & Solano             |
| 2027-2028   | a.<br>b.<br>c.                        | a.<br>b.<br>c.            |

20. What other organizations or groups do your LSP(s) coordinate with? Please also address the AAA's coordination efforts with the Ombudsman program, the local Legal Services Corporation program, and the local Health Insurance Counseling and Advocacy program (HICAP).

There is not currently an active MDT in Solano County because Empowered Aging no

longer coordinates the meetings. LSNC intends to work with providers in Solano County to ensure these meetings resume in 2026. LSNC has also increased its partnership with Choice in Aging, facilitating warm referrals and increasing coordinated services to vulnerable seniors in Solano.

## **SECTION 12. 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 with:

Solano County Office of Emergency Services and Solano County Public Health have established disaster response plans to address various emergency situations that occur. ([https://www.solanocounty.com/depts/oes/eoc/emergency\\_operations\\_plan.asp](https://www.solanocounty.com/depts/oes/eoc/emergency_operations_plan.asp)) ([https://www.solanocounty.com/depts/ph/emergency\\_preparedness.asp](https://www.solanocounty.com/depts/ph/emergency_preparedness.asp)) The disaster plans created by these County offices includes the AAA. Disasters including fire, earthquake, PSPS (Public Safety Power Shutoff) and pandemic are addressed.

The AAA disaster planning includes coordination with:

- local emergency response agencies
    - AAA is based in County government and coordinates with County OES
  - relief organizations
    - AAA has relationships with local providers through emergency response planning meetings
  - state and local governments, and
    - AAA is based in County government and coordinates with County OES
  - other organizations responsible
    - AAA participates in COAD in both Napa and Solano counties
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      | Email  |
|------------------------|--|----------------|--|
| <b>Brianna Jones</b>   | Napa County<br>Emergency Services<br>Officer | (707) 253-4477 | <a href="mailto:brianna.jones@countyofnapa.org">brianna.jones@countyofnapa.org</a>     |
| <b>Angel Hernandez</b> | Napa County<br>Emergency Services<br>Officer | (707) 299-1575 | <a href="mailto:angel.hernandez@countyofnapa.org">angel.hernandez@countyofnapa.org</a> |
| <b>Robyn Rains</b>     | Solano County<br>OES Manager                 | (707)784-1616  | <a href="mailto:rrains@solanocounty.gov">rrains@solanocounty.gov</a>                   |

3. Identify the Disaster Response Coordinator within the AAA:

| Name                  | Title                | Telephone                                    | Email  |
|-----------------------|----------------------|--|--|
| <b>Gwendolyn Gill</b> | Interim AAA Director | Office: (707)784-8276<br>Cell: (707)416-7118 | <a href="mailto:ggill@solanocounty.gov">ggill@solanocounty.gov</a> |

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?   |
|-------------------------------------|--|
| <b>A</b> Nutrition                  | <b>A</b> Home Delivered meal delivery<br>Emergency meal kits<br>Meal pick-up at congregate sites |
| <b>B</b> Information and Assistance | <b>B</b> Phone and online  |
| <b>C</b> Case Management            | <b>C</b> Phone contact and in-person at designated location or in the client's home              |

5. List critical services the AAA will provide for 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)

- Worksite operations are addressed in the County OES and Public Health Emergency Response Plan.  
[https://www.solanocounty.com/depts/oes/eoc/emergency\\_operations\\_plan.asp](https://www.solanocounty.com/depts/oes/eoc/emergency_operations_plan.asp). AAA staff currently work remotely and could continue operations during a disaster. All

systems are cloud based and backed up on multiple servers. All services would continue as usual in the case of a disaster of any type.

| Critical Services               | How Delivered?   |
|---------------------------------|--|
| A. Cyber Attack                 | A. Coordinate with County OES and IT                                 |
| B. Fire at bldg./provider bldg. | B. Coordinate with County OES, fire and emergency response providers |
| C. Site Evacuation              | C. Coordinate with County OES  |
| D. Employee needs               | D. Coordinate with County OES  |

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

- Internet access
- Cell phone
- Connection with county OES for emergency response resources and locations

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

- Solano County Department of Health and Social Services
- Independent Living Resource Center/ADRC

**8.** Describe how the AAA will:

- Identify vulnerable populations: Service Provider client lists
  - Coordinate with service providers
- County IHSS and other aging services
  - Coordinate with County OES and HSA
- Emergency service providers/County EOC
  - Existing relationships with County OES; HSA EOC procedures
- COAD in both Napa and Solano
  - Committee member of COAD
- Identify possible needs of the participants before a disaster event (PSPS, Flood, Earthquake, ETC)
  - The AAA distributes emergency backpacks: Contents include four-day supply food; water/water purification tablets; light sticks; whistle; hand warmers; masks; gloves; cane; poncho; blanket; tent; personal care items; knife; rope; matches and other supplies.
- Follow up with vulnerable populations after a disaster event.

- Phone calls from I&A, visiting, case management providers, and transportation providers.
  - Visits or calls from senior nutrition providers.
9. How is disaster preparedness training provided?
- AAA to participants and caregivers
    - Provider responsibility through contract requirements
  - To staff and subcontractors
    - Staff participate in required County emergency response training
    - Providers are contractually required to provide emergency response training for their staff
    - Annually, county-wide emergency preparedness workshops are held, and contractors are encouraged to participate

Local Tribal organizations: AAA has reached out to the local Tribal TANF but as yet has been unable to create an ongoing relationship. However, the Solano County Office of Emergency Services has a deep relationship with the Yoche Dehe Tribe. The AAA is connected to the OES.

## SECTION 13. NOTICE OF INTENT TO PROVIDE DIRECT SERVICES

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

If 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 ensure that target populations throughout the PSA will be served.

Check if it does not provide any of the below-listed direct services.

Check applicable direct services

**Title IIIB**

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

Check each applicable Fiscal Year

|  | 24-25                               | 25-26                               | 26-27                               | 27-28                    |
|--|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
|  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
|  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
|  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
|  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
|  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |

**Title IIID**

- Health Promotion – Evidence-Based

|  | 24-25                    | 25-26                    | 26-27                    | 27-28                    |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
|  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Title IIIE<sup>9</sup>**

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

|  | 24-25                    | 25-26                    | 26-27                    | 27-28                    |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
|  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Title VII**

- Long Term Care Ombudsman

|  | 24-25                    | 25-26                    | 26-27                    | 27-28                    |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
|  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Title VII**

- Prevention of Elder Abuse, Neglect, and Exploitation.

|  | 24-25                    | 25-26                    | 26-27                    | 27-28                    |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
|  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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

Target populations will continue to be served throughout the PSA through contracted service providers provision of AAA funded services. The "C" coordination funding will increase outreach capacity for the AAA.

<sup>6</sup>Refer to CDA Service Categories and Data Dictionary.

## **SECTION 14. REQUEST FOR APPROVAL TO PROVIDE DIRECT SERVICES**

Complete and submit for CDA approval each direct service not specified previously. The request for approval may include multiple funding sources for a specific service. Check box if not requesting approval to provide any direct services.

**Identify Service Category:** \_\_\_\_\_

Check applicable funding source:<sup>9</sup>

IIIB

IIIC-1

IIIC-2

IIIE

VII

HICAP

Request for Approval Justification:

Necessary to Assure an Adequate Supply of Service OR

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

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

FY 24-25  FY 25-26  FY 26-27  FY 27-28

**Provide:** documentation below that substantiates this request for direct delivery of the above stated service<sup>10</sup>:

The AAA will utilize IIIB funds to hire staff whose responsibilities will include outreach and coordination of non-AAA funded services to reach underserved and at-risk populations.

<sup>6</sup> Section 15 does not apply to Title V (SCSEP).

<sup>7</sup> For a HICAP direct services waiver, the managing AAA of HICAP services

must document that all affected AAAs agree.

## **SECTION 15. GOVERNING BOARD**

### **GOVERNING BOARD MEMBERSHIP 2024-2028 Four-Year Area Plan Cycle**

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

**Total Number of Board Members:** \_\_\_\_\_

| <b>Name and Title of Officers:</b> | <b>Office Term Expires:</b> |
|------------------------------------|-----------------------------|
| Joelle Gallagher Chairperson       | 12/31/27                    |
| Monica Brown Vice Chairperson      | 12/31/27                    |

| <b>Names and Titles of All Members:</b> | <b>Board Term Expires:</b> |
|---|----------------------------|
| Liz Alessio                             | 12/31/29                   |
| Alma Hernandez                          | 12/31/26                   |
| Cassandra James                         | 12/31/27                   |
| Melissa Lamattina                       | 12/31/27                   |
| Edwin Okamura                           | 12/31/27                   |
| David Oro                               | 12/31/26                   |
| Mary Palmer                             | 12/31/27                   |
|   |                            |
|   |                            |

**Explain any expiring terms – have they been replaced, renewed, or other?** Elected members are replaced at the end of their government term. Interested members have had their terms renewed. The chair position rotates between the Napa and Solano Board of Supervisors.

UPDATE 2025: new members were added to the Oversight Board as terms expired.

Update 2026: Terms for members were extended. The chair and vice chair rotated positions.

## **SECTION 16. ADVISORY COUNCIL**

### **ADVISORY COUNCIL MEMBERSHIP 2024-2028 Four-Year Planning Cycle**

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) 20

Number and Percent of Council Members over age 60 -- 17 100% Council 60+

| <b>Race/Ethnic Composition</b> | <b>% Of PSA's<br/>60+Population</b> | <b>% on<br/>Advisory<br/>Council</b> |
|--------------------------------|-------------------------------------|--------------------------------------|
| White                          | 55%                                 | 82%                                  |
| Hispanic                       | 16%                                 | 6%                                   |
| Black                          | 10%                                 | 12%                                  |
| Asian/Pacific Islander         | 18%                                 | 0                                    |
| Native American/Alaskan Native | 1%                                  | 0                                    |
| Other                          | Less than 1%                        | 0                                    |

#### **Name and Title of Officers:**

#### **Office Term Expires:**

|                                  |         |
|----------------------------------|---------|
| Riitta DeAnda, Chairperson       | 6/30/27 |
| Olga Curtright, Vice Chairperson | 6/30/27 |
| Susan Ensey, Secretary           | 6/30/26 |

#### **Name and Title of other members:**

#### **Office Term Expires:**

|                         |                    |
|-------------------------|--------------------|
| Lynne Baker             | 6/30/27            |
| Linda Chandler          | 6/30/28            |
| Linda Giglio            | 6/30/27            |
| <del>Donna Harris</del> | <del>6/30/26</del> |
| Cheryl Johnson          | 6/30/26            |
| Cathy Kahn              | 6/30/26            |
| Michelle Marin          | 6/30/27            |
| Kristi Morrow           | 6/30/27            |

|                  |         |
|------------------|---------|
| Elizabeth Murphy | 6/30/27 |
| Anne Payne       | 6/30/27 |
| Fran Rosenberg   | 6/30/26 |
| Sandy Stevens    | 6/30/27 |
| Cathy Wagner     | 6/30/26 |
| Neill Watter     | 6/30/26 |
| Richard White    | 6/30/26 |
| Alan Werblin     | 6/30/27 |
| Fern Yaffa       | 6/30/26 |

**Name and Title of other members: N/A Office Term Expires:**

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

**Yes No**

- Representative with Low Income
- Representative with a Disability
- Supportive Services Provider
- Health Care Provider
- Local Elected Officials
- Persons with Leadership Experience in Private and Voluntary Sectors

**Yes No Additional Other (Optional)**

- Family Caregiver, including older relative caregiver
- Tribal Representative
- LGBTQ Identification
- Veteran Status
- Other \_\_\_\_\_

**Explain any “No” answer(s):** No applicants from Supportive Services, Tribal or Veteran status. Elected officials serve on the Oversight Board.

**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?**

Advisory Council member terms are for two years. If a member leaves prior to the end of their term, a search is conducted to find a replacement for the duration of the term. Members may serve two consecutive terms.

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

The ad hoc membership committee of the Advisory Council interviews candidates and brings their recommendations to the full Advisory Council for discussion and recommendation. Once recommended, the applicant is forwarded to the Board of Supervisors in the appointing county for approval. Once approved, the candidate is then appointed to the Advisory Council.

# **SECTION 17. MULTIPURPOSE SENIOR CENTER ACQUISITION OR CONSTRUCTION COMPLIANCE REVIEW**<sup>11</sup>

CCR Title 22, Article 3, Section  
7302(a)(15)

## **20-year tracking requirement**

No. Title IIIB funds not used for Acquisition or Construction.

Yes. Title IIIB funds used for Acquisition or Construction.

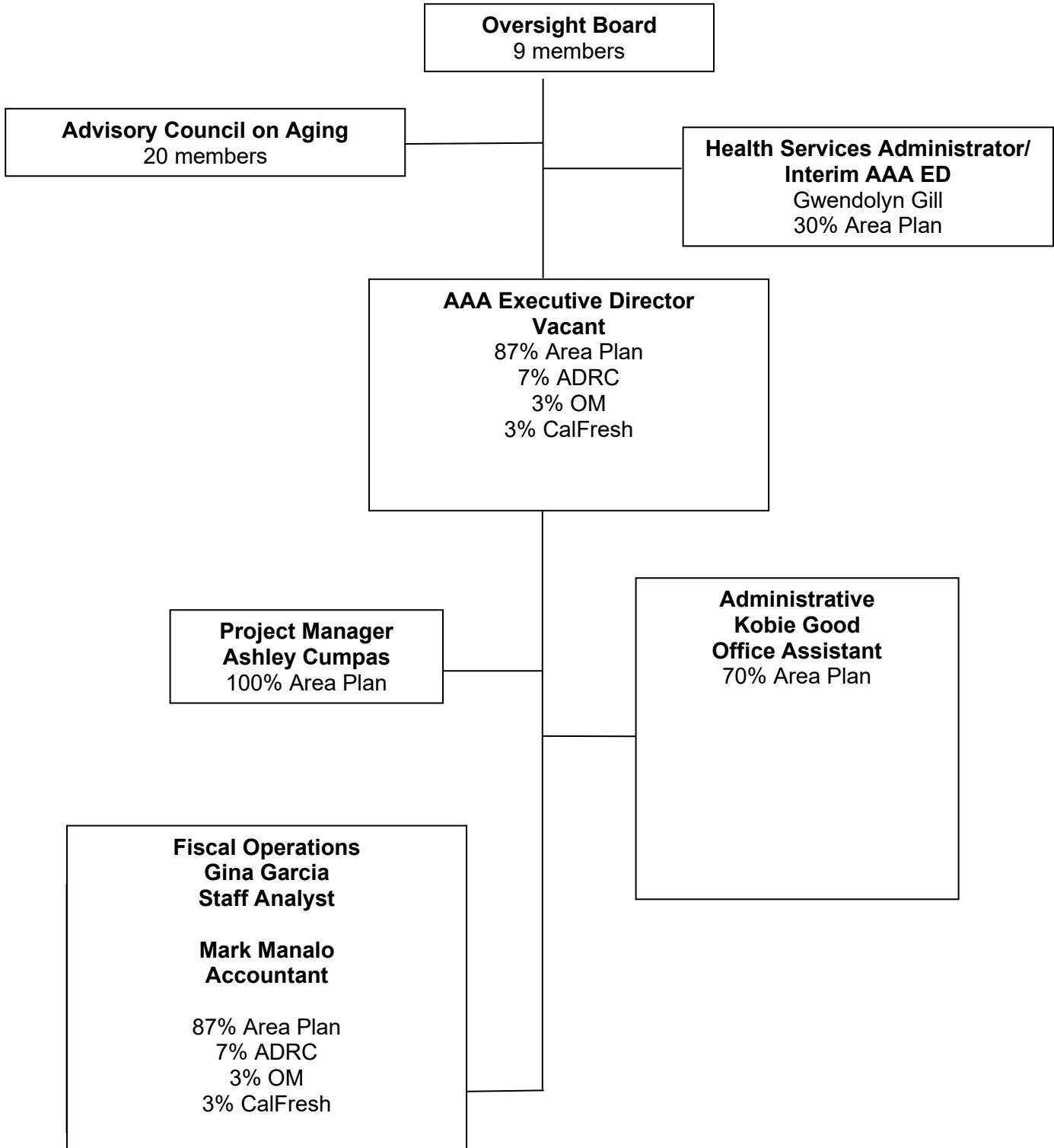
Title III Grantee and/or Senior Center (complete the chart below):

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

<sup>8</sup> Acquisition is defined as obtaining ownership of an existing facility (in fee simple or by lease for 10 years or more) for use as a Multipurpose Senior Center.

# SECTION 18. ORGANIZATION CHART

## Napa/Solano Area Agency on Aging



## **SECTION 19. ASSURANCES**

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

### Sec. 306, AREA PLANS

(a) Each area agency on aging designated under section 305(a)(2)(A) shall, in order to be approved by the State agency, prepare and develop an area plan for a planning and service area for a two-, three-, or four-year period determined by the State agency, with such annual adjustments as may be necessary. Each such plan shall be based upon a uniform format for area plans within the State prepared in accordance with section 307(a)(1). Each such plan shall

(1) provide, through a comprehensive and coordinated system, for supportive services, nutrition services, and, where appropriate, for the establishment, maintenance, modernization, or construction of multipurpose senior centers (including a plan to use the skills and services of older individuals in paid and unpaid work, including multigenerational and older individual to older individual work), within the planning and service area covered by the plan, including determining the extent of need for supportive services, nutrition services, and multipurpose senior centers in such area (taking into consideration, among other things, the number of older individuals with low incomes residing in such area, the number of older individuals who have greatest economic need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas) residing in such area, the number of older individuals who have greatest social need (with particular attention to low-income older individuals, including low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas) residing in such area, the number of older individuals at risk for institutional placement residing in such area, and the number of older individuals who are Indians residing in such area, and the efforts of voluntary organizations in the community), evaluating the effectiveness of the use of resources in meeting such need, and entering into agreements with providers of supportive services, nutrition services, or multipurpose senior centers in such area, for the provision of such services or centers to meet such need;

(2) provide assurances that an adequate proportion, as required under 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; and

(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;

(3)(A) designate, where feasible, a focal point for comprehensive service delivery in each community, giving special consideration to designating multipurpose senior centers (including multipurpose senior centers operated by organizations referred to in paragraph (6)(C)) as such focal point; and

(B) specify, in grants, contracts, and agreements implementing the plan, the identity of each focal point so designated;

(4)(A)(i) (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 items (aa) and (bb) of sub-clause (I);

(ii) provide assurances that the area agency on aging will 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; and

(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; and

(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; and

(III) provide information on the extent to which the area agency on aging met the objectives described in clause (i).

(B) provide assurances that the area agency on aging will use outreach efforts that will—

(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);

(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); and

(VII) older individuals at risk for institutional placement, specifically including survivors of the Holocaust; and

(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; and

(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.

(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;

(6) provide that the area agency on aging will—

(A) take into account in connection with matters of general policy arising in the development and administration of the area plan, the views of recipients of services under such plan;

(B) serve as the advocate and focal point for older individuals within the community by (in cooperation with agencies, organizations, and individuals participating in activities under the plan) monitoring, evaluating, and commenting upon all policies, programs, hearings, levies, and community actions which will affect older individuals;

(C)(i) where possible, enter into arrangements with organizations providing day care services for children, assistance to older individuals caring for relatives who are children, and respite for families, so as to provide opportunities for older individuals to aid or assist on a voluntary basis in the delivery of such services to children, adults, and families;

(ii) if possible regarding the provision of services under this title, enter into arrangements and coordinate with organizations that have a proven record of providing services to older individuals, that—

(I) were officially designated as community action agencies or community action programs under section 210 of the Economic Opportunity Act of 1964 (42U.S.C. 2790) for fiscal year 1981, and did not lose the designation as a result of failure to comply with such Act; or

(II) came into existence during fiscal year 1982 as direct successors in interest to such community action agencies or community action programs; and that meet the requirements under section 676B of the Community Services Block Grant Act; and

(iii) make use of trained volunteers in providing direct services delivered to older individuals and individuals with disabilities needing such services and, if possible, work in coordination with organizations that have experience in providing training, placement, and stipends for volunteers or participants (such as organizations carrying out Federal service programs administered by the Corporation for National and Community Service), in community service settings;

(D) establish an advisory council consisting of older individuals (including minority individuals and older individuals residing in rural areas) who are participants or who are eligible to participate in programs assisted under this Act, family caregivers of such individuals, representatives of older individuals, service providers, representatives of the business community, local elected officials, providers of veterans' health care (if appropriate), and the general public, to advise continuously the area agency on aging on all matters relating to the development of the area plan, the administration of the plan and operations conducted under

the plan;

(E) establish effective and efficient procedures for coordination of—

(i) entities conducting programs that receive assistance under this Act within the planning and service area served by the agency; and

(ii) entities conducting other Federal programs for older individuals at the local level, with particular emphasis on entities conducting programs described in section 203(b), within the area;

(F) in coordination with the State agency and with the State agency responsible for mental and behavioral health services, increase public awareness of mental health disorders, remove barriers to diagnosis and treatment, and coordinate mental and behavioral health services (including mental health screenings) provided with funds expended by the area agency on aging with mental and behavioral health services provided by community health centers and by other public agencies and nonprofit private organizations;

(G) if there is a significant population of older individuals who are Indians in the planning and service area of the area agency on aging, the area agency on aging shall conduct outreach activities to identify such individuals in such area and shall inform such individuals of the availability of assistance under this Act;

(H) in coordination with the State agency and with the State agency responsible for elder abuse prevention services, increase public awareness of elder abuse, neglect, and exploitation, and remove barriers to education, prevention, investigation, and treatment of elder abuse, neglect, and exploitation, as appropriate; and

(I) 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;

(7) provide that the area agency on aging shall, consistent with this section, facilitate the areawide development and implementation of a comprehensive, coordinated system for providing long-term care in home and community-based settings, in a manner responsive to the needs and preferences of older individuals and their family caregivers, by—

(A) collaborating, coordinating activities, and consulting with other local public and private agencies and organizations responsible for administering programs, benefits, and services related to providing long-term care;

(B) conducting analyses and making recommendations with respect to strategies for modifying the local system of long-term care to better—

- (i) respond to the needs and preferences of older individuals and family caregivers;
  - (ii) facilitate the provision, by service providers, of long-term care in home and community-based settings; and
  - (iii) target services to older individuals at risk for institutional placement, to permit such individuals to remain in home and community-based settings;
- (C) implementing, through the agency or service providers, evidence-based programs to assist older individuals and their family caregivers in learning about and making behavioral changes intended to reduce the risk of injury, disease, and disability among older individuals; and
- (D) providing for the availability and distribution (through public education campaigns, Aging and Disability Resource Centers, the area agency on aging itself, and other appropriate means) of information relating to—
- (i) the need to plan in advance for long-term care; and
  - (ii) the full range of available public and private long-term care (including integrated long-term care) programs, options, service providers, and resources;
- (8) provide that case management services provided under this title through the area agency on aging will—
- (A) not duplicate case management services provided through other Federal and State programs;
  - (B) be coordinated with services described in subparagraph (A); and
  - (C) be provided by a public agency or a nonprofit private agency that—
- (i) gives each older individual seeking services under this title a list of agencies that provide similar services within the jurisdiction of the area agency on aging;
  - (ii) gives each individual described in clause (i) a statement specifying that the individual has a right to make an independent choice of service providers and documents receipt by such individual of such statement;
  - (iii) has case managers acting as agents for the individuals receiving the services and not as promoters for the agency providing such services; or
  - (iv) is located in a rural area and obtains a waiver of the requirements described in clauses (i) through (iii);

(9)(A) provide assurances that the area agency on aging, in carrying out the State Long-Term Care Ombudsman program under section 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;

(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) provide a grievance procedure for older individuals who are dissatisfied with or denied services under this title;

(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; and

(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;

(12) provide that the area agency on aging will establish procedures for coordination of services with entities conducting other Federal or federally assisted programs for older individuals at the local level, with particular emphasis on entities conducting programs described in section 203(b) within the planning and service area.

(13) provide assurances that the area agency on aging will—

(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; and

(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; and

(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;

(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;

(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 paragraph (4)(A)(i); and

(B) in compliance with the assurances specified in paragraph (13) and the limitations specified in section 212;

(16) provide, to the extent feasible, for the furnishing of services under this Act, consistent with self-directed care;

(17) include information detailing how the area agency on aging will coordinate activities, and develop long-range emergency preparedness plans, with local and State emergency response agencies, relief organizations, local and State governments, and any other institutions that have responsibility for disaster relief service delivery;

(18) provide assurances that the area agency on aging will collect data to determine—

(A) the services that are needed by older individuals whose needs were the focus of all centers funded under title IV in fiscal year 2019; and

(B) the effectiveness of the programs, policies, and services provided by such area agency on aging in assisting such individuals; and

(19) provide assurances that the area agency on aging will use outreach efforts that will identify individuals eligible for assistance under this Act, with special emphasis on those individuals

whose needs were the focus of all centers funded under title IV in fiscal year 2019.

(b)(1) An area agency on aging may include in the area plan an assessment of how prepared the area agency on aging and service providers in the planning and service area are for any anticipated change in the number of older individuals during the 10-year period following the fiscal year for which the plan is submitted.

(2) Such assessment may include—

(A) the projected change in the number of older individuals in the planning and service area;

(B) an analysis of how such change may affect such individuals, including individuals with low incomes, individuals with greatest economic need, minority older individuals, older individuals residing in rural areas, and older individuals with limited English proficiency;

(C) an analysis of how the programs, policies, and services provided by such area agency can be improved, and how resource levels can be adjusted to meet the needs of the changing population of older individuals in the planning and service area; and

(D) an analysis of how the change in the number of individuals age 85 and older in the planning and service area is expected to affect the need for supportive services.

(3) An area agency on aging, in cooperation with government officials, State agencies, tribal organizations, or local entities, may make recommendations to government officials in the planning and service area and the State, on actions determined by the area agency to build the capacity in the planning and service area to meet the needs of older individuals for—

(A) health and human services;

(B) land use;

(C) housing;

(D) transportation;

(E) public safety;

(F) workforce and economic development;

(G) recreation;

(H) education;

- (I) civic engagement;
- (J) emergency preparedness;
- (K) protection from elder abuse, neglect, and exploitation;
- (L) assistive technology devices and services; and
- (M) any other service as determined by such agency.

(c) Each State, in approving area agency on aging plans under this section, shall waive the requirement described in paragraph (2) of subsection (a) for any category of services described in such paragraph if the area agency on aging demonstrates to the State agency that services being furnished for such category in the area are sufficient to meet the need for such services in such area and had conducted a timely public hearing upon request.

(d)(1) Subject to regulations prescribed by the Assistant Secretary, an area agency on aging designated under section 305(a)(2)(A) or, in areas of a State where no such agency has been designated, the State agency, may enter into agreement with agencies administering programs under the Rehabilitation Act of 1973, and titles XIX and XX of the Social Security Act for the purpose of developing and implementing plans for meeting the common need for transportation services of individuals receiving benefits under such Acts and older individuals participating in programs authorized by this title.

(2) In accordance with an agreement entered into under paragraph (1), funds appropriated under this title may be used to purchase transportation services for older individuals and may be pooled with funds made available for the provision of transportation services under the Rehabilitation Act of 1973, and titles XIX and XX of the Social Security Act.

(e) An area agency on aging may not require any provider of legal assistance under this title to reveal any information that is protected by the attorney-client privilege.

(f)(1) If the head of a State agency finds that an area agency on aging has failed to comply with Federal or State laws, including the area plan requirements of this section, regulations, or policies, the State may withhold a portion of the funds to the area agency on aging available under this title.

(2)(A) The head of a State agency shall not make a final determination withholding funds under paragraph (1) without first affording the area agency on aging due process in accordance with procedures established by the State agency.

(B) At a minimum, such procedures shall include procedures for—

(i) providing notice of an action to withhold funds;

(ii) providing documentation of the need for such action; and

(iii) at the request of the area agency on aging, conducting a public hearing concerning the action.

(3)(A) If a State agency withholds the funds, the State agency may use the funds withheld to directly administer programs under this title in the planning and service area served by the area agency on aging for a period not to exceed 180 days, except as provided in subparagraph (B).

(B) If the State agency determines that the area agency on aging has not taken corrective action, or if the State agency does not approve the corrective action, during the 180-day period described in subparagraph (A), the State agency may extend the period for not more than 90 days.

(g) Nothing in this Act shall restrict an area agency on aging from providing services not provided or authorized by this Act, including through—

(1) contracts with health care payers;

(2) consumer private pay programs; or

(3) other arrangements with entities or individuals that increase the availability of home and community-based services and supports.