



Aging and Adult Services  
Public Guardian

# Needs Assessment and Targeting



# Needs Assessment and Targeting

## Purpose

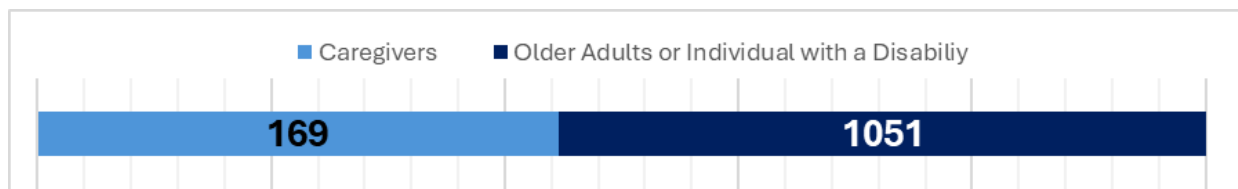
This section describes the processes and methods employed by the AAA to assess the needs of San Bernardino County's older adults, adults with disabilities, and their caregivers. Detailed explanation of how these results are assessed, prioritized and utilized will be provided.

A Needs Assessment was created by the Department of Aging and Adult Services – Public Guardian (DAAS - PG). The following tables represent data collected from March through December of 2024 via the Needs Assessment where 1,220 individuals residing in San Bernardino County participated. DAAS - PG will continue to take comments and feedback throughout the year to update and modernize the Needs Assessment annually. This will enable DAAS - PG to capture the changing and expanding needs for older adults served by San Bernardino County.

The dissemination of the DAAS - PG Needs Assessment will continue to target diverse locations, including senior centers, senior housing complexes, community centers, grocery stores, and congregate meal sites across San Bernardino County. Data will be collected continuously and integrated into the Area Plan with annual updates.

## Data Collected

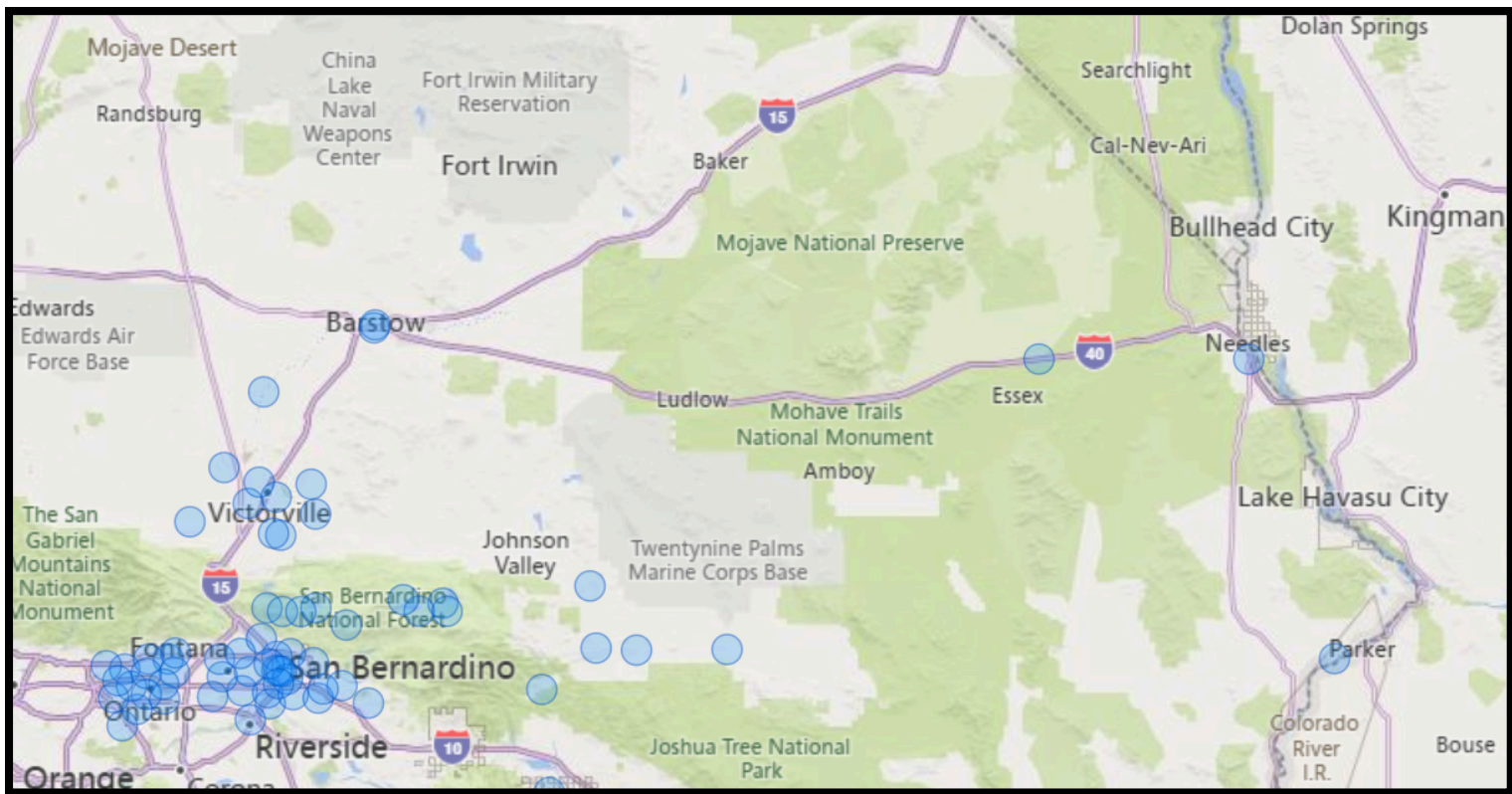
1,220 Needs Assessments were collected from 77 zip codes throughout San Bernardino County. The majority, 86%, were completed by older adults or adults living with a disability, while the remaining 14% were completed by caregivers.



# Needs Assessment and Targeting

## Zip Codes

This map displays the geographic distribution of older adult populations and service access points by zip code across San Bernardino County. Clusters of service usage and population density are concentrated in and around the western and central regions, particularly near San Bernardino, Fontana, Ontario, and Victorville. This data helps inform target outreach, resource allocation, and service expansion in underserved or geographically isolated communities.



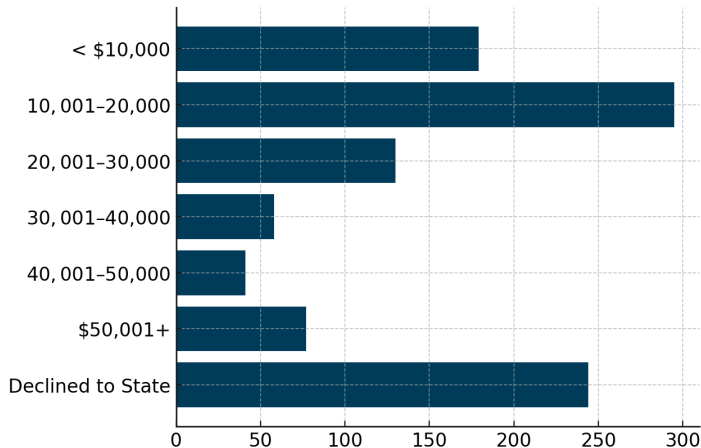
# Needs Assessment and Targeting

## Aging Demographics

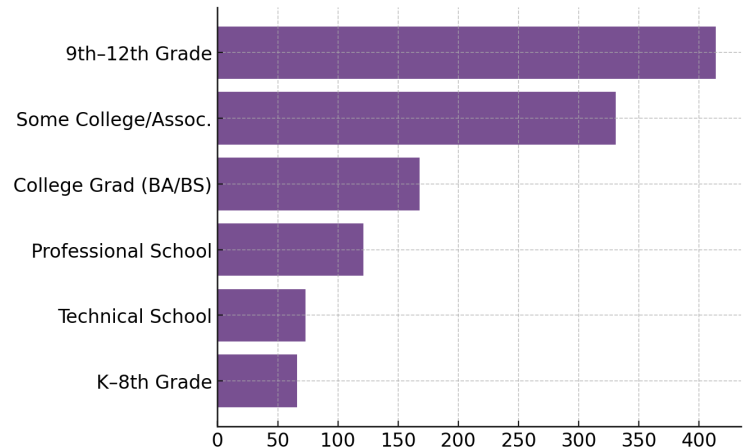
This section outlines the demographic characteristics of survey respondents, which includes income, education, employment and ethnicity. These insights provide context for interpreting community needs and service priorities.

The majority of respondents are fully retired and over the age of 65, with most reporting annual incomes under \$20,000. Education levels vary, but a large portion completed some high school or college coursework without a degree. The sample is moderately diverse, with White (48%) and Latino/Latinx (26%) respondents making up the largest ethnic groups. These findings highlight key considerations for developing programs that are financially accessible, culturally inclusive, and tailored to varying educational backgrounds.

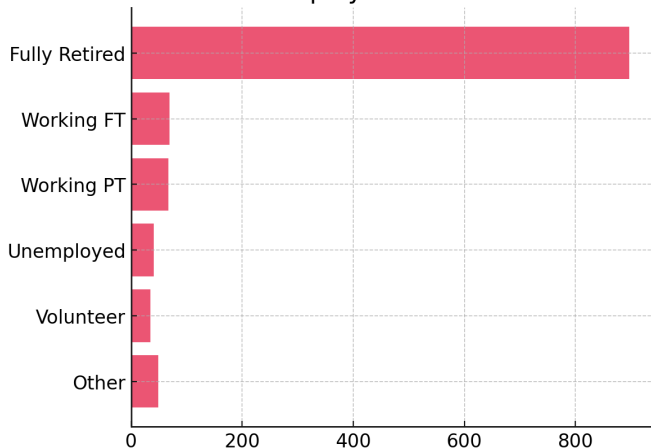
Income Distribution



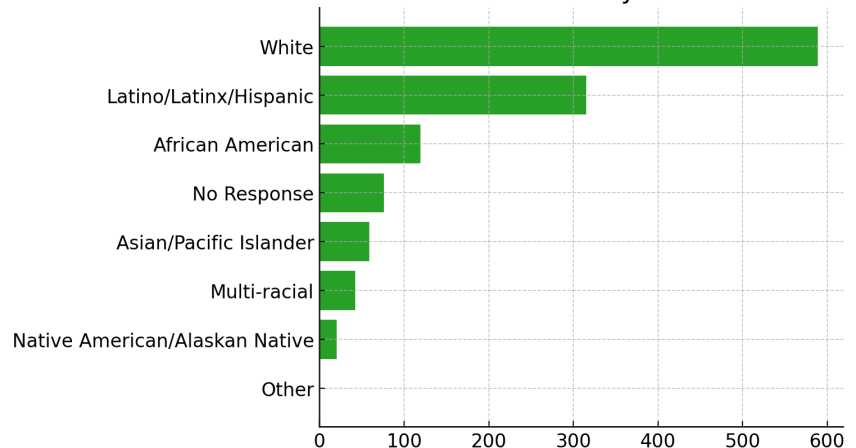
Education Level



Employment Status



Ethnicity



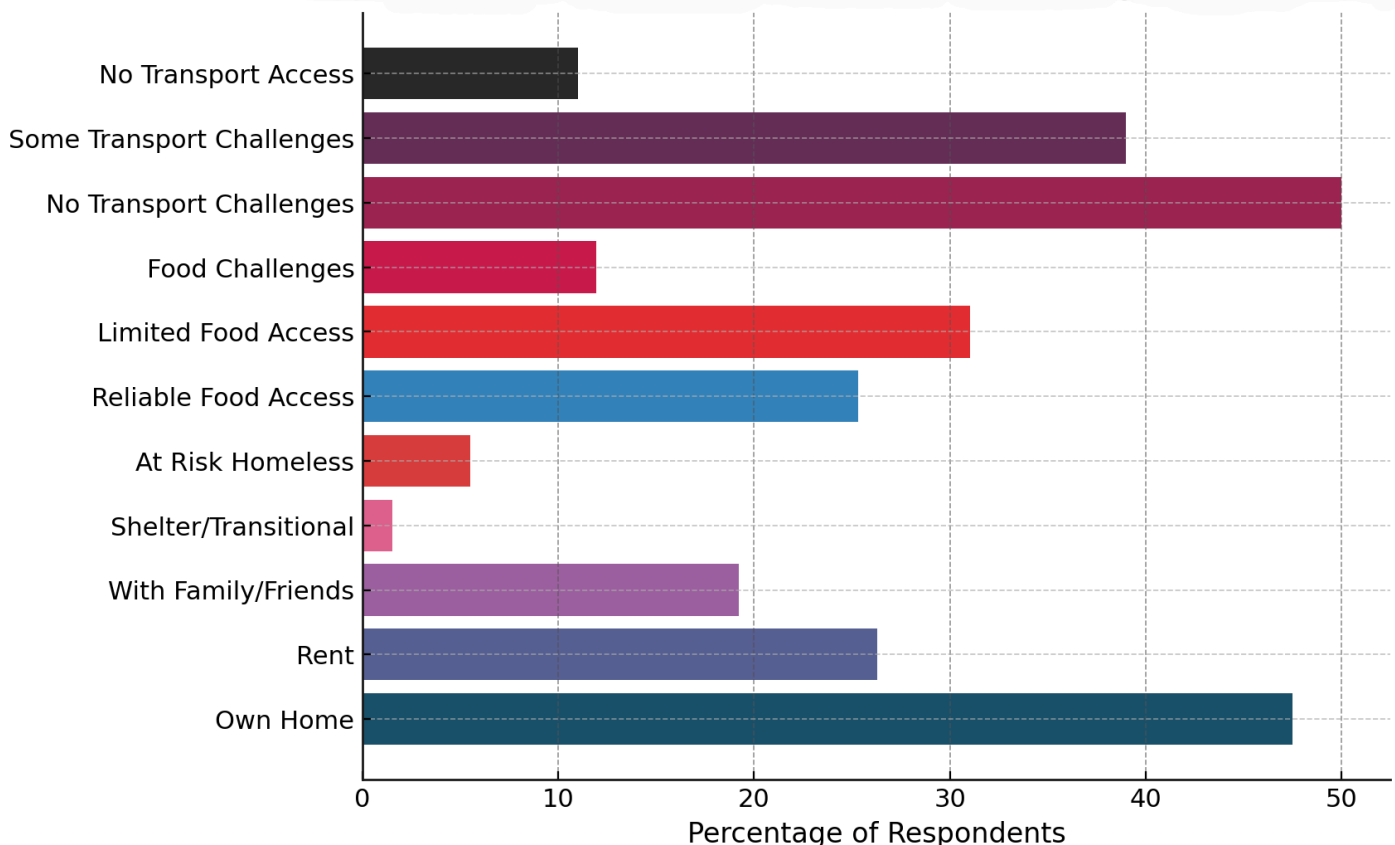


# Needs Assessment and Targeting

## Screening

The screening section aims to assess key factors affecting the well-being and accessibility for respondents. This includes, transportation challenges, food security, housing stability, and chronic health conditions. Understanding these areas helps identify barriers to essential services.

- **Housing Instability:** While 47.5% of respondents own their home, over 30% rely on renting or living with others, and 7% face housing instability (shelter/homelessness risk).
- **Food Insecurity:** Over 43% of respondents experience food insecurity, with limited or inadequate access to meals.
- **Transportation Barriers:** Half (50%) of respondents have transportation difficulties, affecting their ability to access work, healthcare, and food.
- **Chronic Health Conditions:** A significant portion of respondents (564 individuals) reported having a chronic health condition or identifying as a person with a disability.

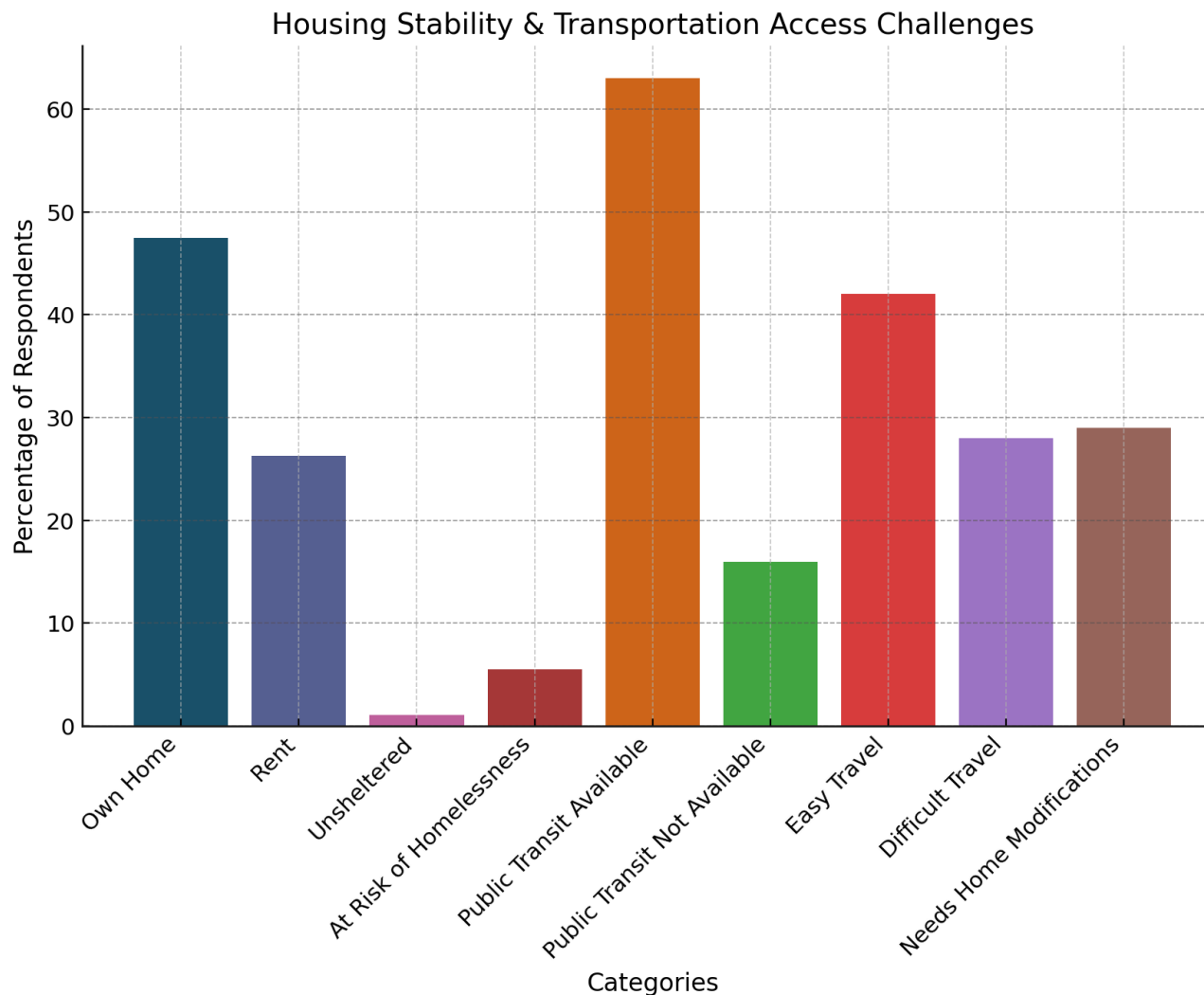


# Needs Assessment and Targeting

## Housing and Transportation

This section evaluates transportation accessibility and housing stability, two critical factors affecting daily life, mobility, and financial well-being.

- **Housing Stability:** Nearly 50% of respondents own homes, but 5.5% are at risk of homelessness, and 1.1% are unsheltered.
- **Transportation Access:** 63% report available public transit, but 16% lack access.
- **Mobility Ease:** 42% find travel easy, while 28% experience difficulties.
- **Accessibility Needs:** 29% require home modifications to remain in their homes.

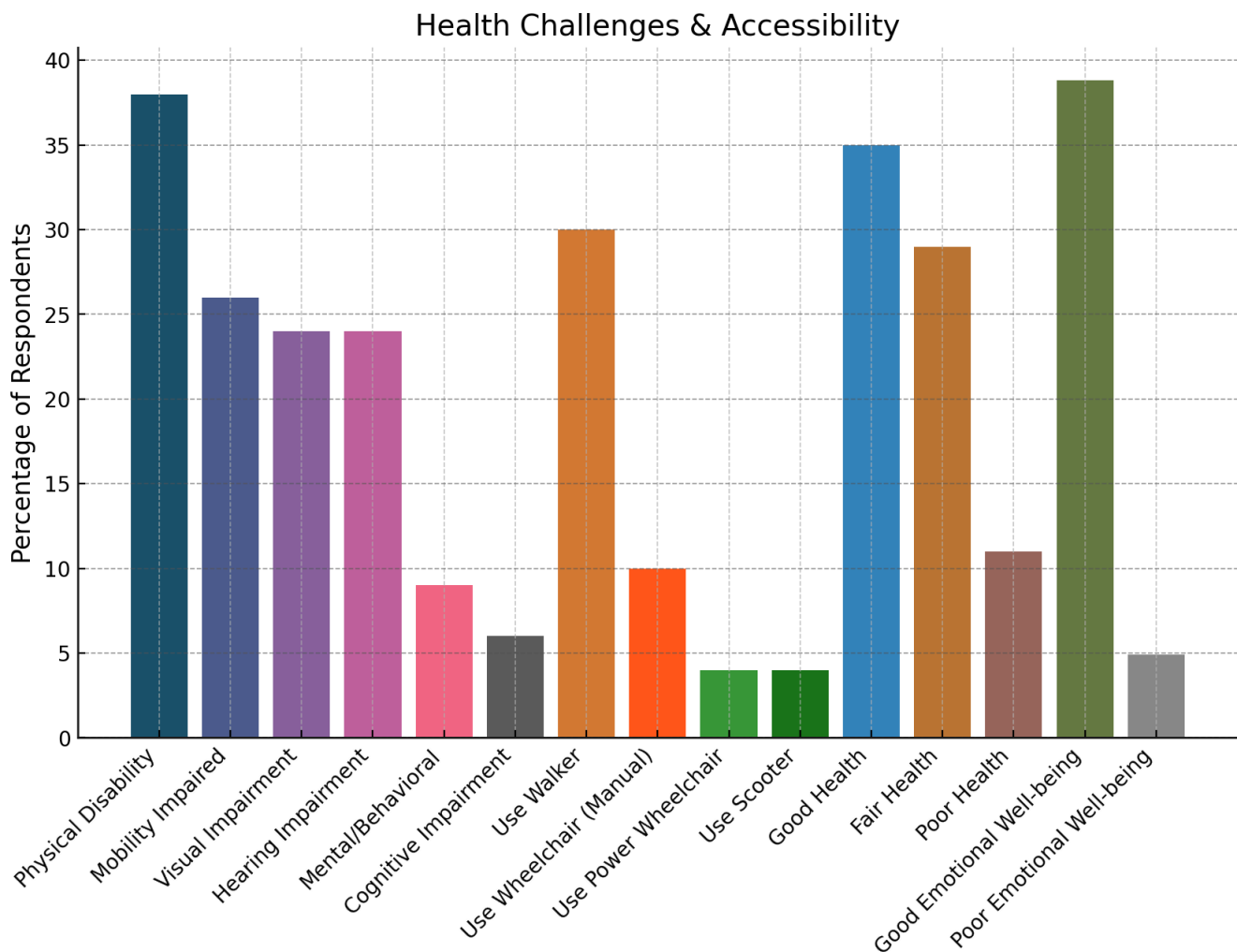


# Needs Assessment and Targeting

## Health

This section examines physical and cognitive disabilities, mobility aid usage, self-rated health, and emotional well-being among respondents. With 96% of respondents having health insurance, yet 4% remain uninsured, this may present barriers to accessing medical care.

- Thirty-eight percent report physical disabilities and 26% have mobility impairments, requiring better accessibility services.
- Thirty percent use walkers, and 14% use wheelchairs or scooters, indicating a need for mobility assistance.
- Thirty-five percent rate their health as good, but 11% say it is poor.
- Thirty-nine percent feel emotionally well, but nearly 5% rate their mental health as poor.



# Needs Assessment and Targeting

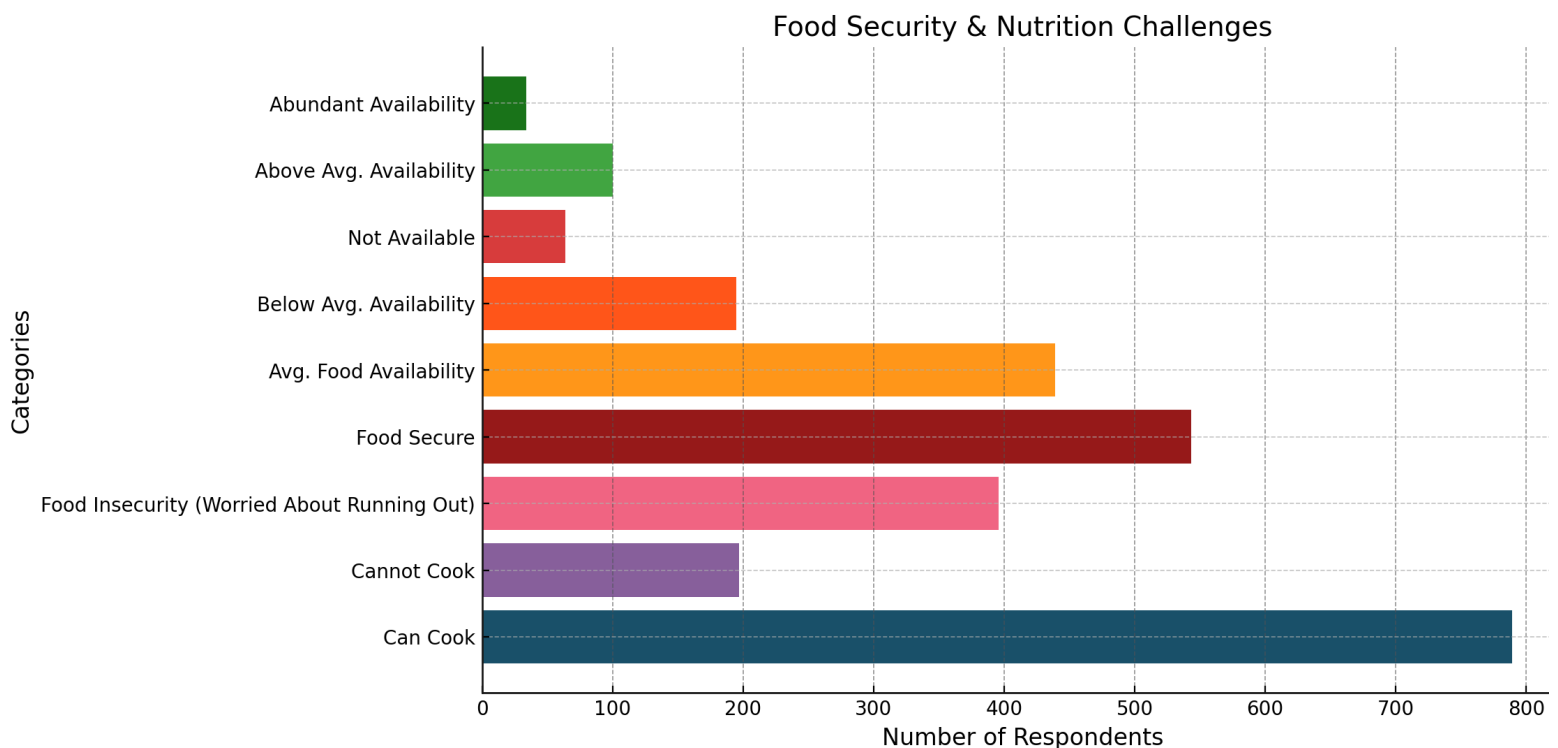
## Food Security & Nutrition

This section focused on food security, cooking ability, and access to affordable, quality food in San Bernardino County.

While 80% of respondents can cook for themselves, 20% cannot, indicating a potential need for meal assistance programs or food delivery services for those with limited cooking ability. Additionally, 42% of respondents worry about running out of food due to financial constraints, and ongoing food insecurity issues.

When asked about available, affordable and quality food, nearly 46% rated it as average, while 20% found it below average. Alarming, 6.6% reported that quality food is not available at all, and only had 3.5% believe food is abundantly available.

These findings underscore the need for expanded food assistance programs, affordable grocery options, and community food resources to ensure all residents have consistent access to nutritious meals.



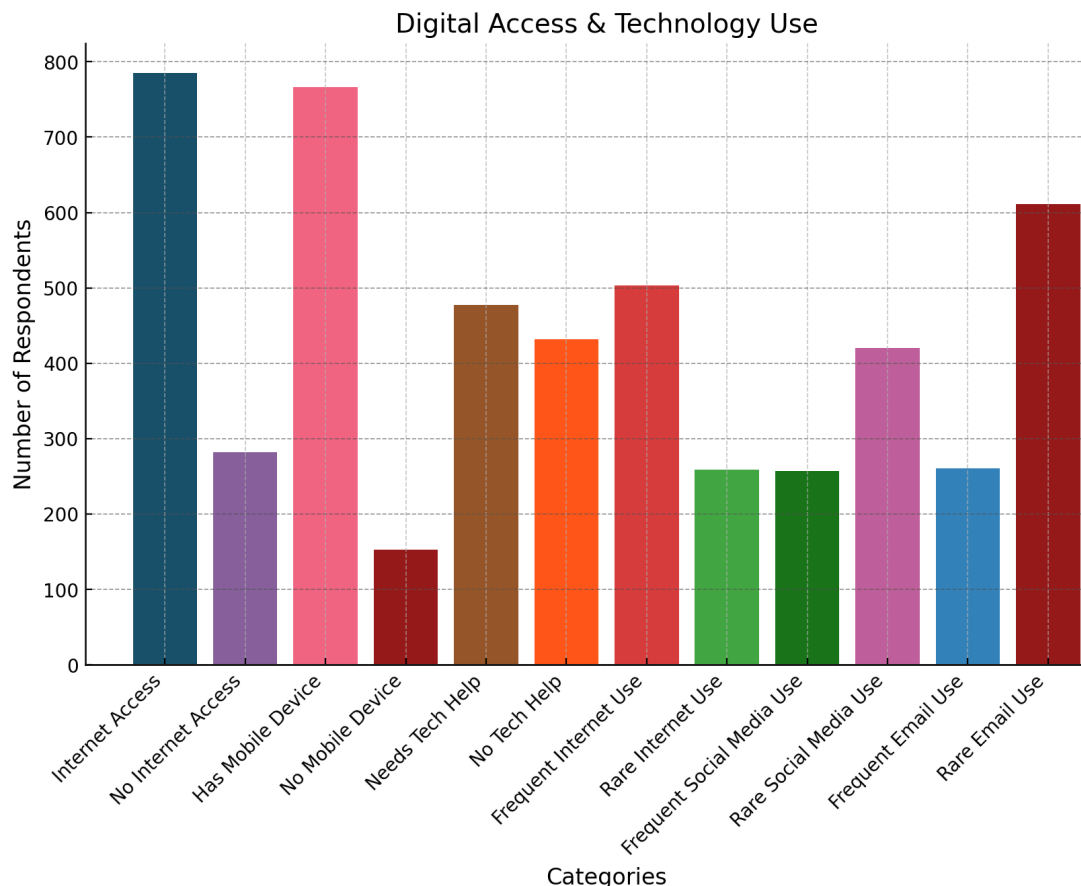
# Needs Assessment and Targeting

## Technology Access

This section evaluates access to technology, device availability, technology literacy, and digital communication habits among respondents. While 74% of respondents have internet access at home, 26% lack access, which may limit their ability to participate in online services. Similarly, 83% have mobile or communication devices, but 17% do not, highlighting a digital divide that could impact access to essential resources.

Notably, 53% of respondents require assistance with using technology devices, indicating a significant need for digital literacy programs, technical support services, and accessibility tools to bridge skill gaps.

- Forty-eight percent access the internet several times a day, while 25% rarely or never do.
- Forty-one percent rarely or never use social media, whereas 25% access it several times a day.
- Email usage varies, with 26% checking several times a day and 61% rarely or never check email in some cases, potentially affecting communication reliability.





# Needs Assessment and Targeting

## Emergency Preparedness & Caregiving Support

This section covers areas of the Needs Assessment pertaining to emergency preparedness and caregiving support. Results highlighted the need for increased disaster preparedness education and planning and the need for improved access to caregiver assistance.

### Emergency Preparedness

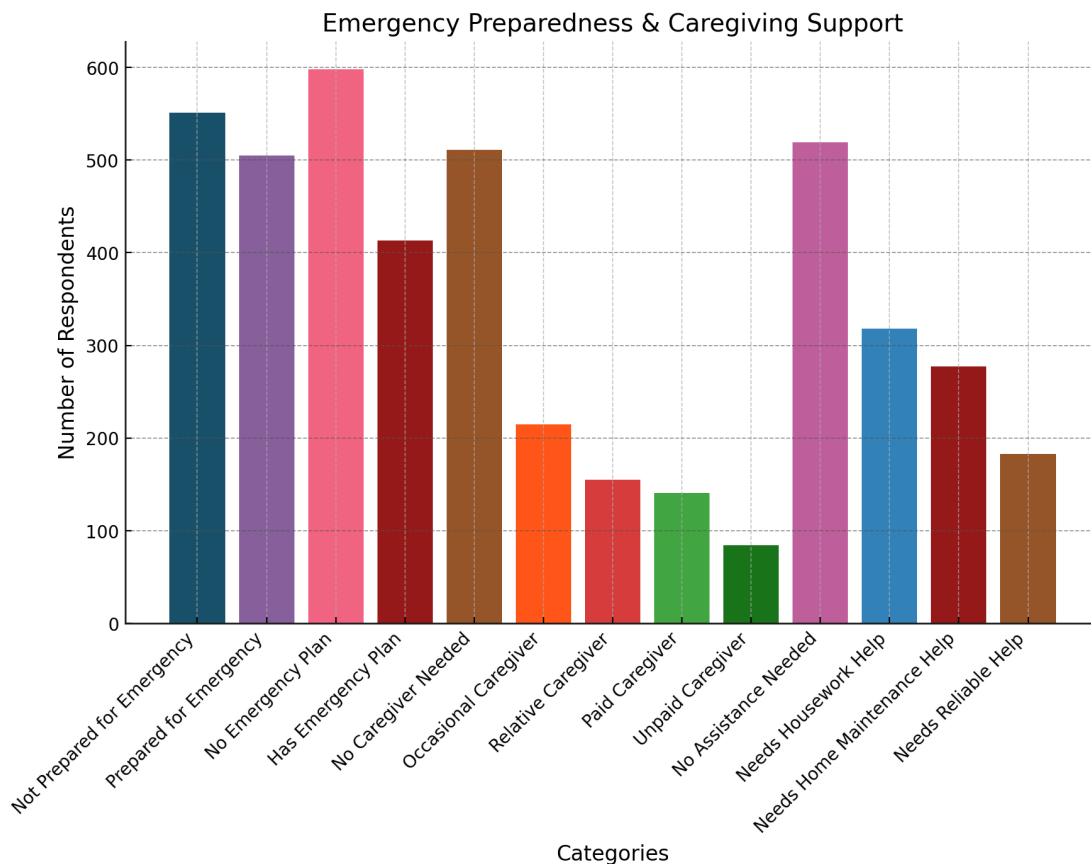
- Fifty-two percent of respondents answered that they are not prepared for an emergency or natural disaster, 59% of respondents do not have an emergency plan.

### Caregiver Status

- Fifty-one percent report not needing a caregiver: 21% rely on someone occasionally for assistance.
- Twenty-nine percent have a caregiver (relative, paid, or unpaid).

### Assistance Needs

- While 52% do not require assistance, a significant number need help with housework (32%) and home maintenance (28%).
- Eighteen percent need help finding a reliable person for assistance.



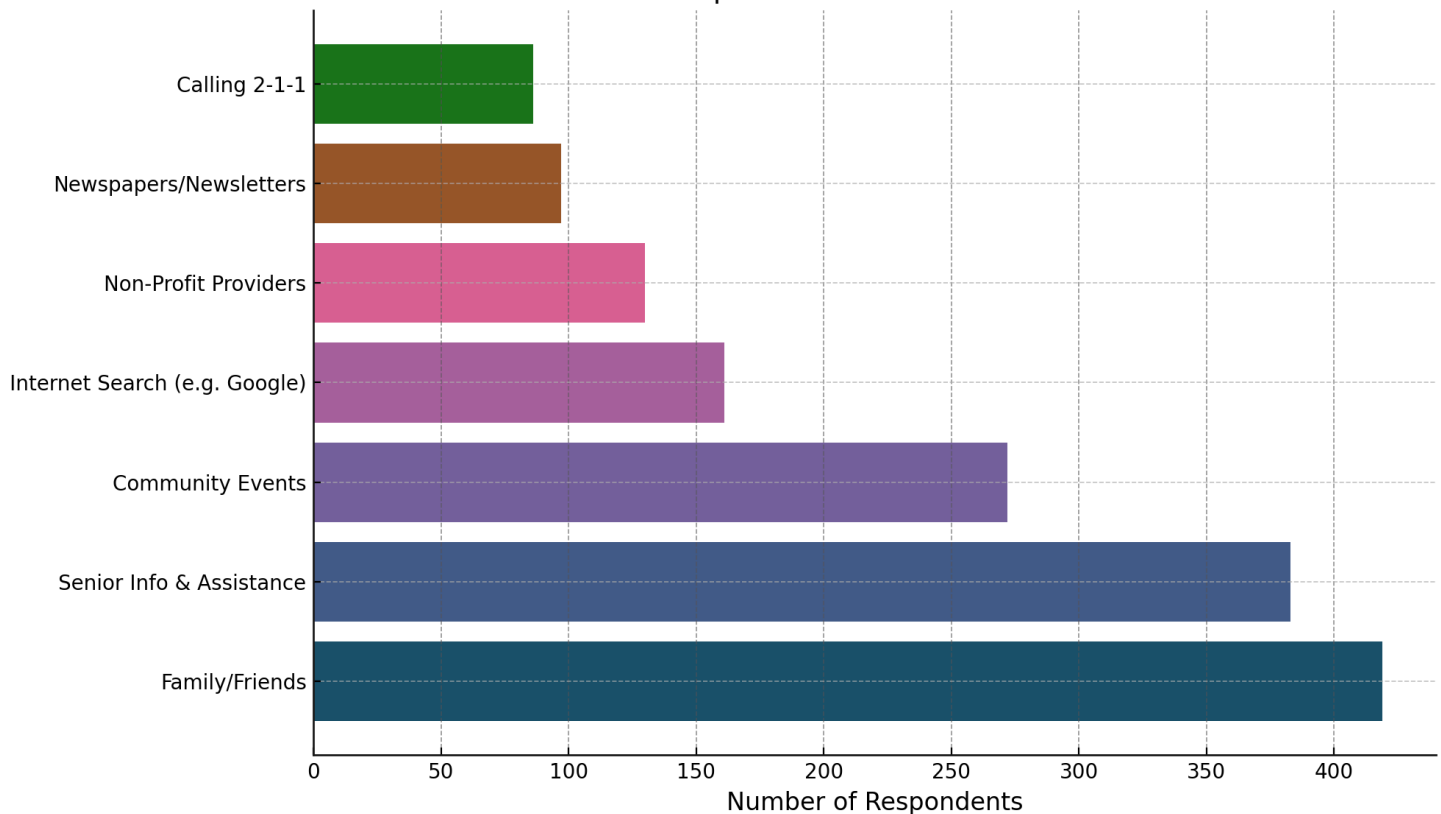
# Needs Assessment and Targeting

## Accessing Services

Survey participants shared how they most commonly access information about services for older adults and those with disabilities. The data shows a strong reliance on personal and community-based sources, with:

- Forty-one percent hearing from family or friends, the most common source of information.
- Thirty-eight percent relying on Senior Information and Assistance, a critical resource in the community.
- Twenty-seven percent attending community events, showing in-person outreach remains effective.

How Respondents Learn About Services



Digital Channels, while growing in relevance, were used less frequently:

- Only 16% reported using internet searches, and
- Just 8% used 2-1-1, suggesting these tools may still face awareness or accessibility challenges.

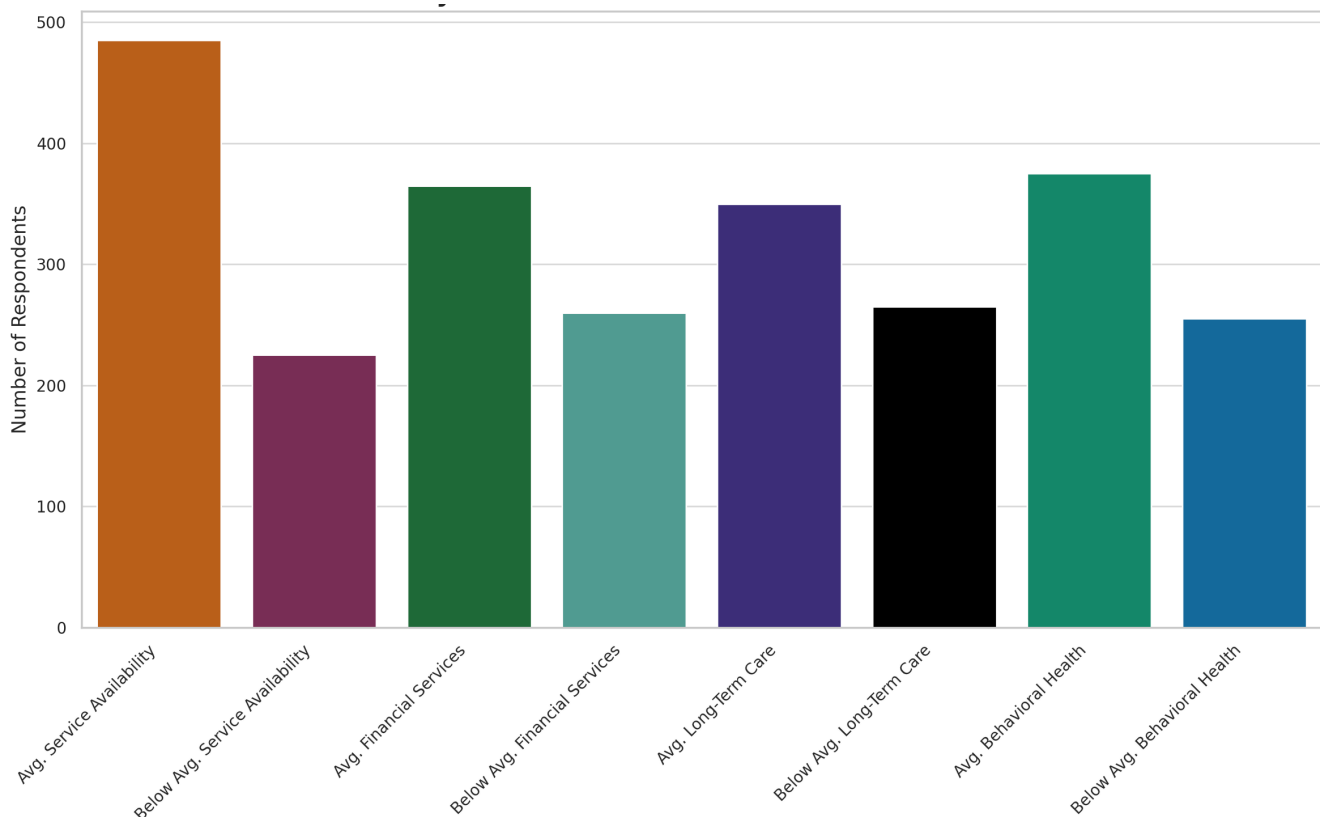
This insight highlights the importance of maintaining trusted personal networks and traditional outreach channels, while also investing in efforts to expand digital access and awareness of public service navigation tools.

# Needs Assessment and Targeting

## Accessing Services, Continued

Survey responses from older adults in San Bernardino County reveal that most services are perceived as having average availability while very few are seen as “abundantly available.” Across categories, there is a consistent pattern of unmet expectations and potential gaps in accessibility, particularly for long-term care and financial/legal support.

- General Services for Older Adults: 50% rated overall service availability as average, while 5% said abundantly available.
- Education, Culture, and the Arts: 46% felt these were average, with 28% rating below average
- Financial/Legal Services: 31% rated below average, 17% said not at all available.
- Long-Term Care Options: 32% rated below average, 16% not at all available.
- Behavioral Health: 45% rated average, 30% rated below average.
- Volunteer & Recreation: Higher marks - 48-51% rated average.
- Skills Building & Social Activities: 45%-48% rated average while 30% below average.
- Awareness: Only 10% feel very informed while over half reported being somewhat informed.

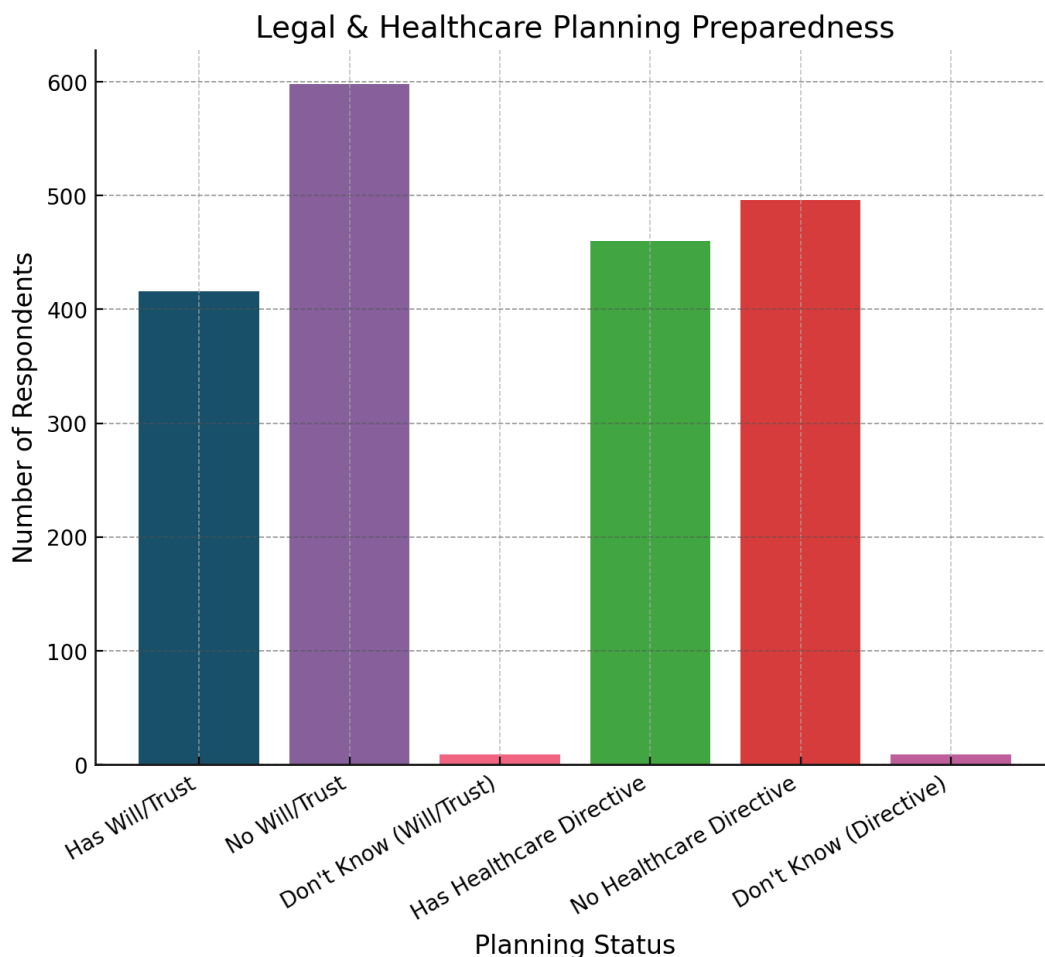


# Needs Assessment and Targeting

## Legal and Healthcare Planning

This section discusses the outcomes from asking community members whether they have a will or trust, or if they have an advance healthcare directive. Results showed that there is a strong need for education and access to estate planning resources.

- Only 41% of respondents have a will or trust, while 59% do not.
- Less than 1% are unsure.
- Just under 48% have an advanced healthcare directive, while 51% do not.
- Only 0.9% were uncertain.
- The small difference between 'Yes' and 'No' responses show room for increased outreach and guidance in completing this important healthcare document.

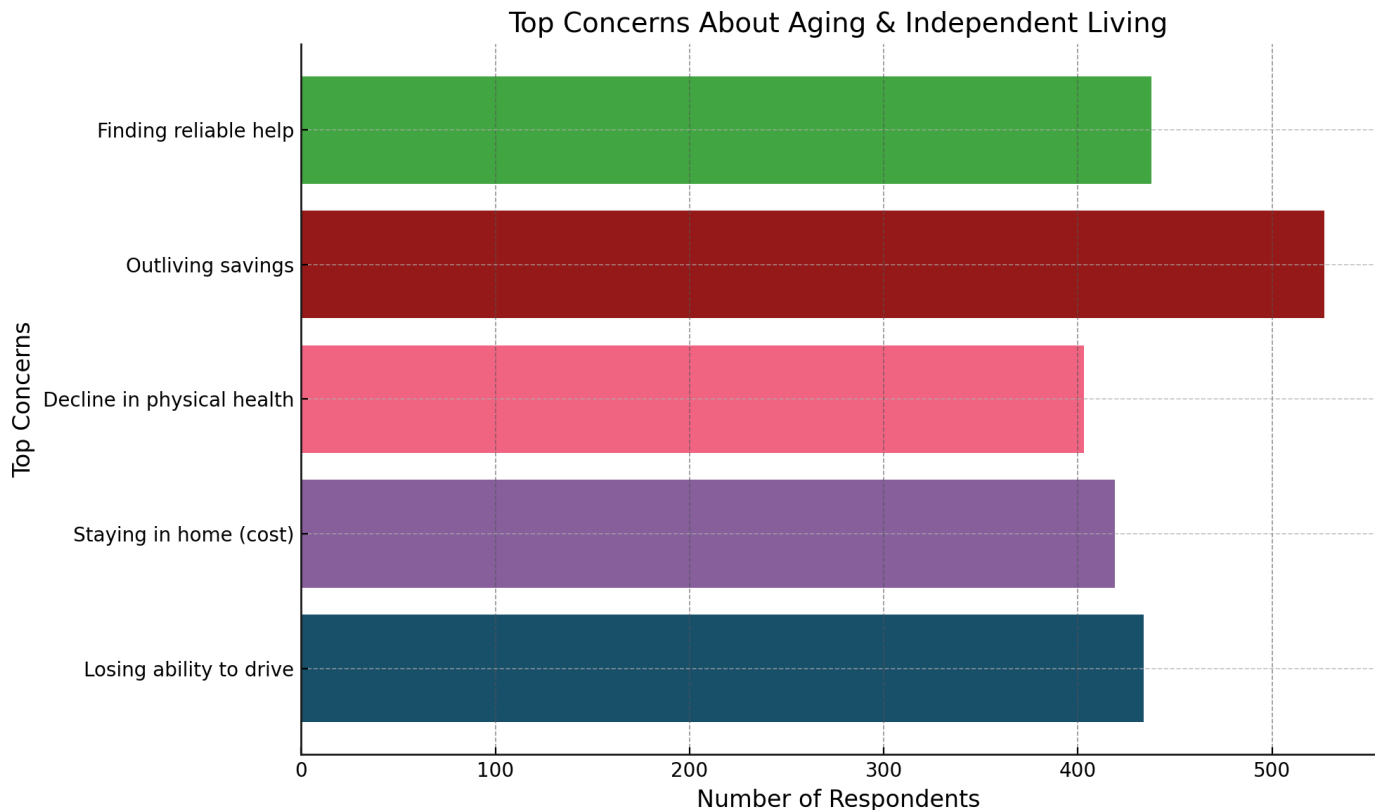


# Needs Assessment and Targeting

## Top Concerns

This section highlights respondents most pressing concerns across five critical areas: transportation, housing, health, finances, and receiving care. These insights provide a comprehensive look at the barriers older adults with disabilities face as they strive to maintain independence and quality of life.

- Outliving savings was the most reported concern, reflecting widespread financial anxiety in later life.
- Finding reliable help and losing the ability to drive point to a growing need for trusted caregiving and accessible transportation.
- Concerns about staying in one's home and declining physical health underscore the importance of affordable housing and proactive healthcare.





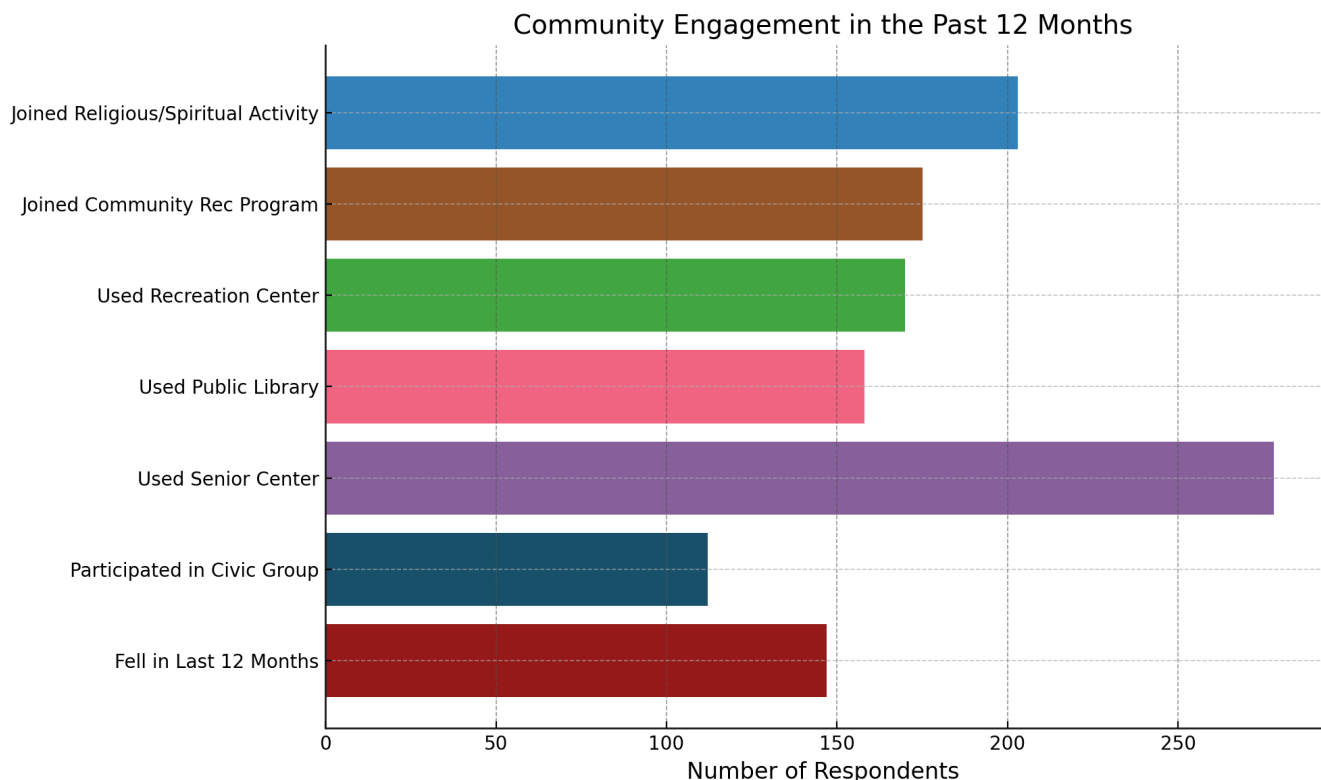
# Needs Assessment and Targeting

## In the Past 12 Months Have You....

This section evaluates respondents participation in community spaces, activities, and social groups over the span of the previous 12 months.

Senior Centers had the highest engagement, reinforcing their value as central community hubs.

- Two-hundred and three **Individuals** participated in religious or spiritual gatherings, indicating strong social or emotional reliance on faith-based communities.
- Participation in recreation centers and community programs was moderate, suggesting room for outreach or expansion.
- Public libraries were used by 158 respondents, highlighting continued value in free, accessible public resources.
- Only 112 respondents engaged in civic groups, reflecting low levels of formal civic participation.
- One-hundred and forty-seven respondents experienced a fall, indicating a need for fall prevention education and safer environments.

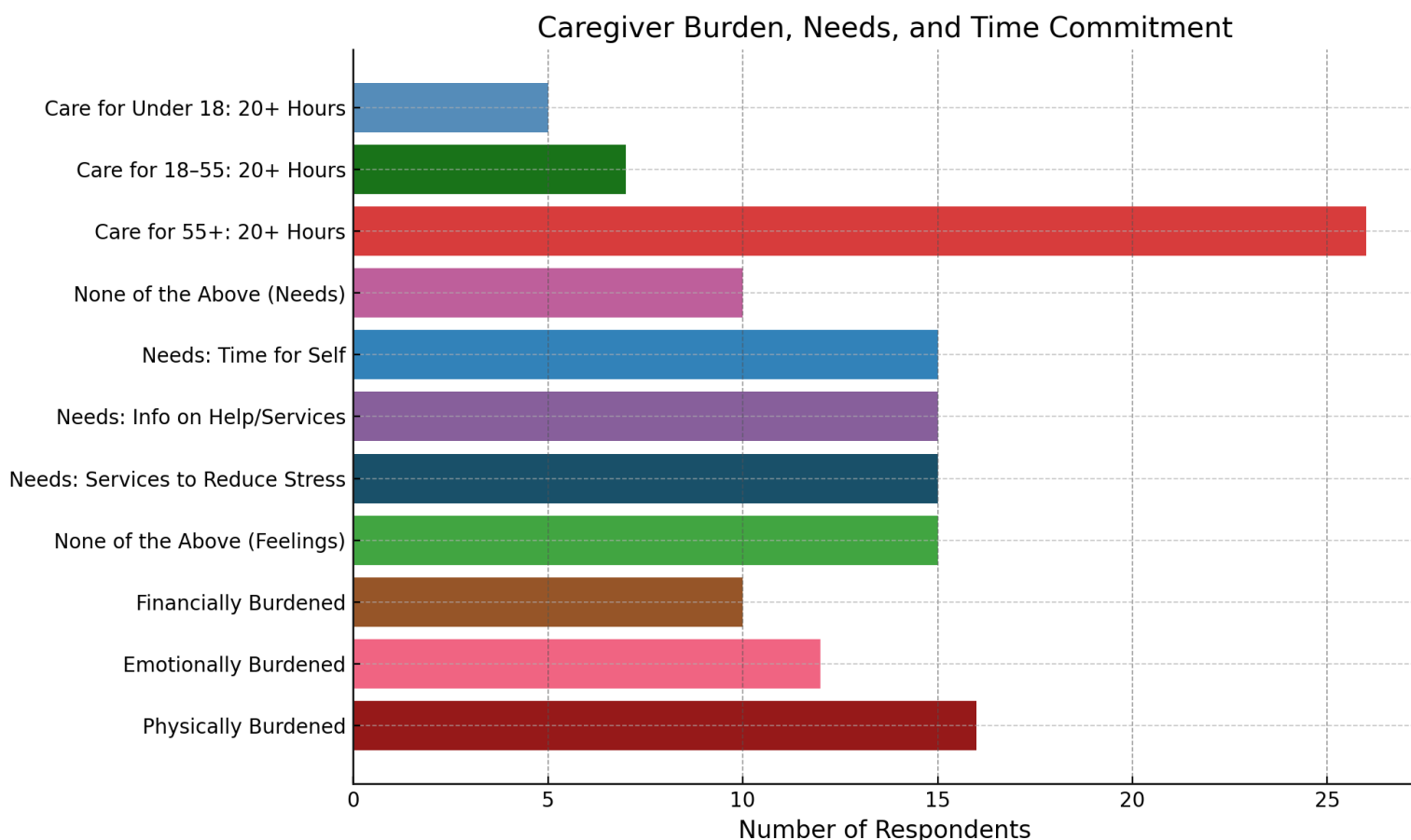


# Needs Assessment and Targeting

## Caregivers

This section explores the burdens, support, and caregiving responsibilities of respondents who have provided care over the past 12 months.

The data reveals that while many respondents are providing substantial care - especially to adults ages 55 and older - a significant number are also experiencing physical, emotional and financial burdens. These findings underscore the importance of accessible caregiver support programs, respite services, and improved outreach to reduce stress and prevent burnout.



# Needs Assessment and Targeting

## Resources

A wide range of services and resources are available throughout the county to support older adults, adults with disabilities, and their caregivers. Residents can access assistance through the Senior Information and Assistance program (SIA) by calling 1-800-510-2020. Additionally, services are available through San Bernardino County's Aging and Disability Resource Connected (ADRC), which follows a No Wrong Door approach. This initiative is a collaboration with Rolling Start Inc., a non profit organization, and 2-1-1, a free and confidential service that connects individuals to community, health, and human services. SIA, Rolling Start Inc. and 2-1-1 provide guidance on services covered under the Older Americans Act (OAA) as well as additional resources that are not funded by OAA.

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

The Family Caregiver Support Program (FCSP) provides essential services for unpaid caregivers, including respite care, supportive services, supplemental services, access assistance, and information resources. With two vendors currently offering these services, a Needs Assessment will help determine gaps and guide future expansion. The California Department of Aging (CDA) prioritizes strengthening caregiver support, ensuring resources continue to grow to meet the needs of older adults and individuals with disabilities.

## Adequate Proportion

One of the many considerations for determining adequate proportion of Title IIIB funds for supportive services are the needs identified in the assessment. Factors determining adequate proportion include the following: 1) the availability of services in the county, 2) historical use of services, and 3) requests for services. Title IIIB provides a variety of services to address functional limitations, maintain health and independence, and promote access to services. Available services include but are not limited to: personal care, homemaker, chore, adult day care, case management, assisted transportation, transportation, legal assistance, information and assistance, and outreach.

## Legal Services

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

# Needs Assessment and Targeting

## In-Home Services

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

## Access Services

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

## Targeting Defined

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

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

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

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

# Needs Assessment and Targeting

## Targeted Populations

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

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

The latest results from previous needs assessments, completed by 1,200 participants have identified populations with limited access to services or a lack of programs to address their unique concerns. Understanding the county needs of all individuals is essential to ensuring equitable access to services. To better serve the community, DAAS - PG will continue to refine the survey, incorporating questions that reflect evolving community needs and priorities.



# Needs Assessment and Targeting

## Targeted Populations, Continued

The California Department of Aging (CDA) has encouraged Area Agencies on Aging (AAA) to actively identify underrepresented populations to ensure equitable access to resources. This includes a current statewide survey being conducted by the CDA in collaboration with the University of San Francisco. This survey is focused on gathering data from California residents in the LGBTQIA+ community who are in mid-life or older adulthood. The survey results, along with the results of the departments Needs Assessments, will continue to be used to develop programs to address historically underserved communities.

Pursuant to the CDA's recommendation of providing focus to underrepresented populations, similar efforts are being made for other communities who have had limited access to services. For example, Native American Indian and Alaska Native residents make up 2.2% of San Bernardino County's population (U.S. Census Bureau, July 1, 2023). Another population included in this extended focus are those individuals living with HIV/AIDS. While Title III services are available to all eligible residents, Senior Information and Assistance (SIA) staff will enhance outreach efforts to ensure greater inclusion of underserved populations in available programs and services.

Due to the county's vast and remote areas, there is a limited number of contracted service providers in isolated communities. To address this, an open contract procurement process prioritizes funding for the most needed services in underserved regions where organizations are unable to independently offer programs. DAAS-PG staff also provides guidance and technical assistance to volunteer and nonprofit organizations working to expand service availability in rural areas.

To further support aging in place, SIA staff, stationed at six strategic locations across the county, actively conduct outreach to older adults throughout the region. They have reported an increasing demand for transportation assistance as well as for additional funding for home modifications, both of which align with the Countywide Vision of promoting independence and accessibility for older adults.



Aging and Adult Services  
Public Guardian

# Priority Service and Public Hearings



# Priority Service and Public Hearings

## Purpose

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

## 2024-2028 Four-Year Planning Cycle

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

The minimum percentages of applicable Title IIIB funds listed below have been identified for annual expenditure throughout the four-year planning period. These percentages are based on Needs Assessment findings, resources available within the AAA, and discussions at public hearings on the Area Plan.

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

#### **Access**

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

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

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

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

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

## Priority Service and Public Hearings

### 2024-2028 Four-Year Planning Cycle, Continued

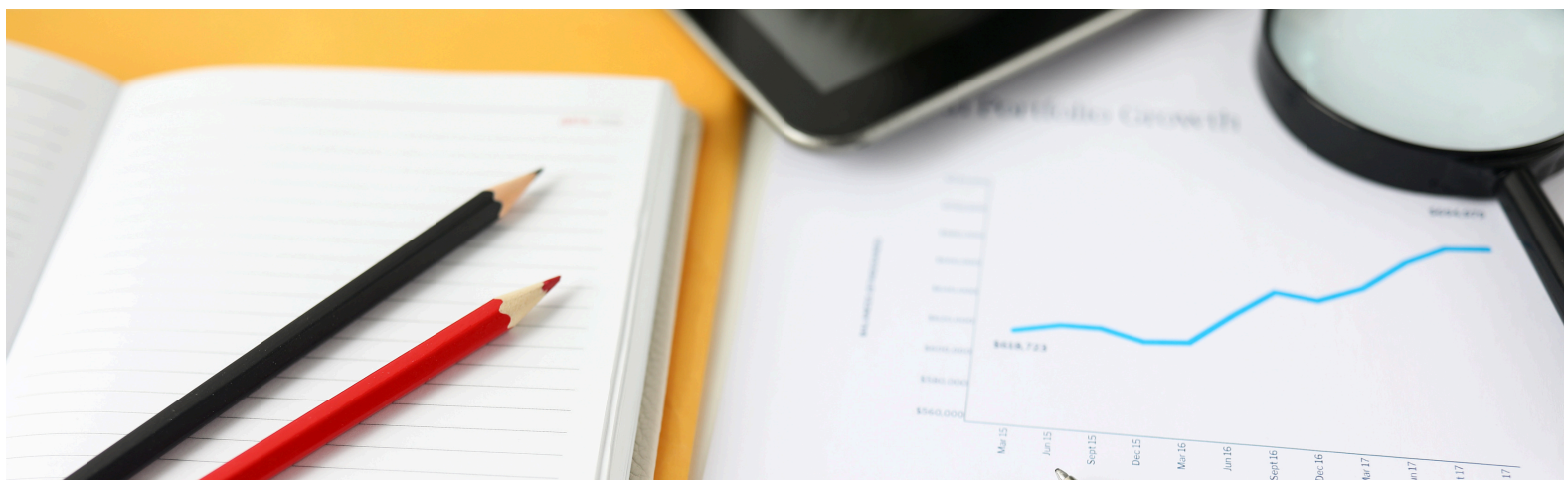
**Category of Service and the Percentage of Title IIIB Funds expended in/or to be expended in FY 2024-25 through FY 2027-2028.**

## Legal Assistance Required Activities

Legal advice, representation, assistance to the Ombudsman program, and involvement in the private bar.

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

Allocations reflect historical funding trends and public feedback. The included Needs Assessment lists in-home services, namely home repairs, as one of the top needs among those surveyed. The in-home services funding allocation has been raised in response to that need. The AAA provides limited Title IIIB access direct services, primarily through information and assistance and outreach. In-home services are delivered through contracted vendors, but securing providers who can economically offer these services across the county's large and geographically diverse regions remains a priority. Legal assistance is also being provided through a contracted vendor.





# Priority Service and Public Hearings

## 2024-2028 Four-Year Planning Cycle, Continued

### **PUBLIC HEARING:**

At least one public hearing must be held each year of the four-year planning cycle. California Code of Regulations, Title 22, Article 3, Section 7302(a)(10) and Section 7308, Older Americans Act Reauthorization Act of 2020, Section 314(c)(1).

Fiscal Year	Date	Location	Number of Attendees	Presented in Languages Other Than English?	Located at a Long-Term Care Facility?
2024-2025	3/20/2024	784 E. Hospitality Ln. San Bernardino, CA 92415	36	Yes	No
2025-2026	3/19/2025	784 E. Hospitality Ln. San Bernardino, CA 92415	30	Yes	No
2026-2027					
2027-2028					





# Priority Service and Public Hearings

## 2024-2028 Four-Year Planning Cycle, Continued

**The following will be discussed at each public hearing conducted during the planning cycle:**

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

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

**Morongo Basin – March 10, 2025 (Yucca Valley Senior Center)**

**East Valley – March 11, 2025 (Montclair Senior Center)**

**Victor Valley – March 11, 2025 (Department of Aging and Adult Services - Public Guardian)**

**Northern Desert – March 12, 2025 (Trona Senior Center)**

**Mountain Region – March 20, 2025 (Crestline Senior Center)**

**West Valley – March 19, 2025 (Department of Aging and Adult Services - Public Guardian)**

Public meeting notices are posted and distributed in advance of every meeting. Area Plan surveys are distributed to Title IIIC Home-Delivered clients by delivery drivers. Additionally, Senior Information and Assistance (SIA) staff distributed community comment documents at senior centers, as well as posting them for public viewing. Postings are shared to all contracted partners and program participants.

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

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

# Priority Service and Public Hearings

## 2024-2028 Four-Year Planning Cycle, Continued

1. **Were proposed expenditures for Program Development (PD) or Coordination (C) discussed?**
  - a. ☒ **Yes. Go to question #3.**
  - b. ☐ **Not applicable, PD and/or C funds are not used. Go to question #2.**
2. **Were attendees provided the opportunity to testify regarding setting minimum percentages of Title IIIB program funds to meet the adequate proportion of funding for priority services?**
  - a. ☐ **Yes. Go to question #3.**
  - b. ☐ **No. Explain:**
3. **Summarize the comments received concerning minimum percentages of Title IIIB funds to meet the adequate proportion of funding for priority services.**
  - Area Agency on Aging staff described priority services, services included in each category, and the minimum percentage of funds proposed. No public comment received regarding the **services** and updates presented.
4. **List any other issues discussed or raised at the public hearing.**
  - Inquiries regarding changes in funding or loss of funding due to administration changes:
    - Area Agency on Aging staff informed that at this time there has been no changes to Area Plan funding and the department will continue to provide all services listed and presented in the Area Plan.
  - Inquiring regarding clarification on definitions of units of service:
    - Area Agency on Aging staff provided clarification on several services on what is an allowable service and if the units of service is acknowledged as person served, item received, or hours of service.
5. **Note any changes to the Area Plan that were a result of input by attendees.**
  - Input from the public will be considered for the second year update and future Area Plan presentations. These changes include:
    - Print size of all forms being released such as the Comment Forms and Needs Assessments.