

San Bernardino County Area Agency on Aging
Planning and Service Area 20
2020-2024 Area Plan

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OVERVIEW PSA 20

2020-2024 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 5-1-20 only](#)

Section	Four-Year Area Plan Components	4-Year Plan
	Transmittal Letter – <i>must have original, ink signatures or official signature stamps- no photocopies</i>	☒
1	Mission Statement	☒
2	Description of the Planning and Service Area (PSA)	☒
3	Description of the Area Agency on Aging (AAA)	☒
4	Planning Process / Establishing Priorities	☒
5	Needs Assessment	☒
6	Targeting	☒
7	Public Hearings	☒
8	Identification of Priorities	☒
9	Area Plan Narrative Goals and Objectives:	☒
9	Title IIIB Funded Program Development (PD) Objectives	☒
9	Title IIIB Funded Coordination (C) Objectives	☒
9	System-Building and Administrative Goals & Objectives	☒
10	Service Unit Plan (SUP) Objectives and Long-Term Care Ombudsman Outcomes	☒
11	Focal Points	☒
12	Disaster Preparedness	☒
13	Priority Services	☒
14	Notice of Intent to Provide Direct Services	☒
15	Request for Approval to Provide Direct Services	☒
16	Governing Board	☒
17	Advisory Council	☒
18	Legal Assistance	☒
19	Multipurpose Senior Center Acquisition or Construction Compliance Review	☒
20	Title III E Family Caregiver Support Program	☒
21	Organization Chart	☒
22	Assurances	☒

AREA PLAN UPDATE (APU) CHECKLIST

PSA 20

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

Use for APUs only

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

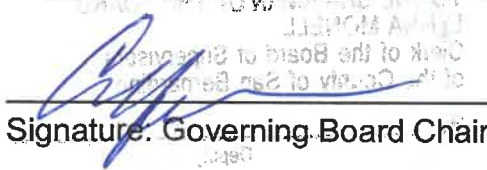
TRANSMITTAL LETTER
2020-2024 Four Year Area Plan / Annual Update
Check one: ☒ **FY 20-24** ☐ **FY 21-22** ☐ **FY 22-23** ☐ **FY 23-24**

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

PSA 20

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

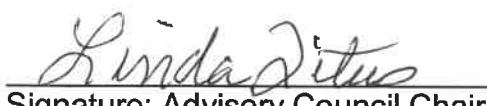
1. Curt Hagman


Signature: Governing Board Chair ¹

JUL 14 2020

Date

2. Linda Titus


Signature: Advisory Council Chair

7/7/20

Date

3. Sharon Nevins


Signature: Area Agency Director

7/6/20

Date

¹ Original signatures or official signature stamps are required.

SECTION 1. MISSION STATEMENT

State of California Required Core Mission Statement

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

Countywide Vision

San Bernardino County has adopted the following Vision Statement.

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

Department of Aging and Adult Services Mission Statement

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

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

Physical Characteristics

The geographic area comprising Planning and Service Area (PSA) 20 is the County of San Bernardino in California. San Bernardino County (also referred to as "County", SBC, or Area Agency on Aging [AAA]) covers 20,105 square miles, and is the largest County in the contiguous United States. The County comprises 12% of California's land area. To illustrate, the states of Massachusetts, Delaware, Rhode Island and New Jersey *combined* fit within the boundaries of San Bernardino County.

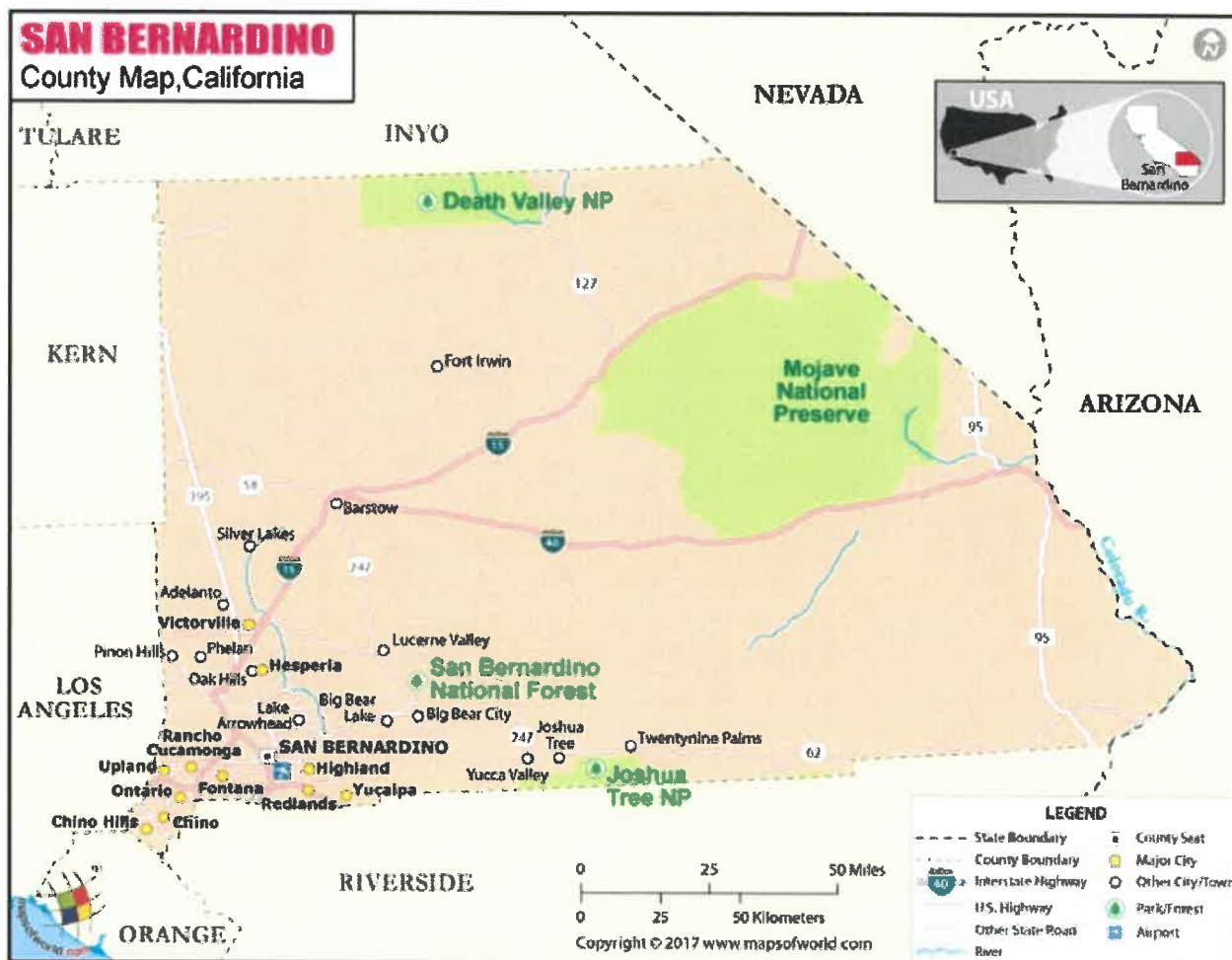
Map of San Bernardino County
Comparative to California, Nevada, and Arizona:



The County of San Bernardino is located in Southern California approximately sixty miles inland from the Pacific Ocean and its southern border is 100 miles north of Mexico. The AAA is a microcosm of the entire state with urban, suburban and rural areas. The County stretches on the west border from Pomona in Los Angeles County eastward to the Colorado River and the states of Arizona and Nevada. It extends from Anaheim in Orange County in the southwest to Death Valley and nearly to Las Vegas, Nevada in the northeast. Five counties and two states abut San Bernardino County: Inyo County on the north; Kern and Los Angeles counties on the west; Orange and Riverside counties on the south; and the states of Arizona and Nevada on the east. Over 90% of the County is desert; primarily the Mohave Desert with a small portion of the Colorado Desert represented at the southeastern end of the County. Almost three-quarters of the County is open and undeveloped; 80% of the land is owned by federal agencies and is outside

the governing control of the County or the local jurisdictions. The remainder of the County consists of the San Bernardino Valley, and a series of Transverse Mountain Ranges that bisect the County in an east-west divide. The ranges include the San Gabriel Mountains, San Bernardino Mountains, and the Little San Bernardino Mountains.

Map Showing Proximity to Surrounding Counties and States



With a population of 2,180,085, San Bernardino County is the fourteenth most populous County in the United States and the fifth most populous in California, according to the U.S. Census Bureau. There are twenty-four incorporated cities and towns in the County. The majority of the County population resides in cities, with 311,659 persons or approximately 14% of residents in unincorporated areas.

The largest cities in the County are listed below.

City	Population	Rank	Rank in California
San Bernardino	217,946	1	19
Fontana	213,000	2	20
Ontario	182,871	3	25
Rancho Cucamonga	175,522	4	28
Victorville	126,432	5	48

Source: California Department of Finance, Demographic Research Unit, Population Estimates for Cities, Counties, and the State January 1, 2019 and 2020, May 1, 2020

The top four cities are located in the valley area of the County which is generally the southwest portion of the County; 75% of the County's population is concentrated in the valley area. Fontana, Rancho Cucamonga and Ontario are contiguous to each other and their combined population would make the area the fifth most populous city in California (behind San Francisco and ahead of Fresno). Victorville is the largest city outside of the valley and is located in the High Desert.

Demographic Characteristics

The demographic information detailed below comes from a variety of sources including the US Census and the State of California. Detailed information on the Elder Economic Security Index is provided by UCLA Center for Health Policy Research.

2019 California Department of Aging Population Demographic Projections for San Bernardino County

The latest available data from California Department of Aging was prepared in 2019 as part of the Intrastate Funding Formula (IFF).

	Population 60+	Non- Minority 60+	Minority 60+	Low Income 60+	Medi-Cal Eligible 60+
Number of Persons	403,844	198,964	204,880	52,450	88,649
Percent of California 60+ Population	4.56%				
Percent of SB County Population 60+	N/A	49.27%	50.73%	12.99%	21.95%

Total California population 60 + = 8,822,132

	Geo. Isolation 60+	SSI/SSP 65+	Population 75+	Lives Alone 60+	Non- English 60+
Number Of Persons	21,182	25,395	107,928	58,260	18,790
Percent of SB County Population 60+	5.25%	6.29%	26.73%	14.43%	4.65%

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

From 2016 to 2019, the 60+ population for the IFF for the County has increased by 15.8%. Based on the projections of the United States Census Bureau, as of July 1, 2019, 11.6 % of the population in San Bernardino consisted of adults 65 and older. This increase in population does not include the growth in the 60 to 64 age group.

Resources and Constraints

The AAA, as the Department of Aging and Adult Services, is a Department within the Human Services group of the County of San Bernardino. Being a part of the larger organization is a resource in and of itself. Information gathering, coordination of services, and consolidation of resources is facilitated. One example is the development of a comprehensive and coordinated Disaster Plan that addresses the interaction of all County departments. Another example is the use of geographic information systems based software maintained by Human Services Administration to contact DAAS clients during an emergency situation.

The Department has also developed and maintained a working collaboration with the Department of Social Work from California State University San Bernardino (CSUSB). The partnership has facilitated research analysis and data collection on a variety of projects since 2004. DAAS also receives several social work interns each academic year from CSUSB.

San Bernardino County, because of its enormous size, diversity of population, and geography, faces some special problems when planning for services. Over three-quarters of the population live in the southwestern valley portion of the County. This part of the County is urban and/or suburban with services available from an array of sources. The remainder of the population lives in the vast stretches of deserts and mountains that are studded with small and sometimes isolated communities. Approximately 81% of this land is government owned and managed by federal agencies. Subzero temperatures during the winter months in the mountain areas and temperatures in excess of 120 degrees in the vast desert areas, present some critical problems for planning services particularly for the elderly on fixed incomes.

The geography of the County present's unique challenges for service delivery as access to services from outlying areas can be difficult. Specifically, there are two areas where proximity to shopping, healthcare, and business services are located in an adjacent county or state. Trona, for example, is located in the northwest corner of the County and is approximately 20 miles from the city of Ridgecrest in Kern County as opposed to Barstow which is approximately 90 miles away or a 2 hours' drive. Similarly, the communities along the Colorado River (Needles, Havasu Lake, and Big River) are closer to the states of Arizona and Nevada (e.g., Needles to Barstow is 149 miles).

Service System

The AAA provides direct delivery of Senior Information and Assistance (SIA), Long-Term Care Ombudsman, including Prevention of Elder Abuse, Neglect and Exploitation, and the Title V Senior Community Service Employment Program (SCSEP). All three programs operate throughout the County to best serve the older population.

DAAS coordinates with San Bernardino County Human Services Contracts division for procurements and contracts. County policy limits contracts to a maximum of three years. To accommodate the workload a rotating schedule has been developed. The following services are procured for the four year duration of the Area Plan.

Fiscal Year	Program
2019/20	IIIB, Legal Services IIIE, Family Caregiver Support Program
2020/21	IIIB, Supportive Services Program Health Insurance Counseling Advocacy Program (HICAP)
2021/22	IIIC, Elderly Nutrition Program Multipurpose Senior Services Program (MSSP)
2022/23	IIIB, Legal Services only IIIE, Family Caregiver Support Program
2023/24	IIIB, Supportive Services Program Health Insurance Counseling Advocacy Program (HICAP)

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

The County is divided into the following service areas.

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

Specific programs by funding are listed below.

Title IIIC Fiscal Year	Provider	Location	Number of Service Sites
2019 - 2022	Barstow Senior Citizens Center	North-Western Desert, Victor Valley	4 sites and home delivered meals
	Big Bear Valley Recreation and Park District	SB Mountains	1 site
	Bonnie Baker Senior Citizens Club	East Desert	2 sites and home delivered meals
	City of Montclair	West Valley	1 site
	City of San Bernardino	East Valley	6 sites
	Crest Forest Senior Citizens' Club	SB Mountains	1 site
	Family Service Association	East and West Valleys, Morongo Basin	18 sites and home delivered meals
	Lucerne Valley Senior Citizens Club	Victor Valley	1 site

Title IIIB Fiscal Year	Program	Location	Number of Service Providers
2020 - 2023	Legal Services	All RSAs	1
2018 - 2021	Adult Day Care	East and West Valleys, Victor Valley	1
2018 - 2021	Assisted Transportation	Morongo Basin, East and West Valleys, Victor Valley	4
2018 - 2021	Chore	Morongo Basin, East and West Valleys, Victor Valley, North-Western Desert, SB Mountains	3
2018 - 2021	Homemaker	Morongo Basin, East and West Valleys, Victor Valley, North-Western Desert, SB Mountains	3
2018 - 2021	Personal Care	East and West Valleys, Victor Valley, North-Western Desert, SB Mountains	1
2018 - 2021	Residential Repairs / Modifications	East Desert, East and West Valleys, Victor Valley, North-Western Desert, SB Mountains	3
2018 - 2021	Senior Center Activities	East Desert, Morongo Basin, Victor Valley, North-Western Desert	7

Title III E Fiscal Year	Program	Location	Number of Service Providers
2020 - 2023	Access Assistance	East and West Valleys, Victor Valley, North-Western Desert, SB Mountains, Morongo Basin	1
2020 - 2023	Information Services	East and West Valleys, Victor Valley, North-Western Desert, SB Mountains, Morongo Basin	1
2020 - 2023	Respite Care	East and West Valleys, Victor Valley, North-Western Desert, SB Mountains, Morongo Basin	2
2020 - 2023	Support Services	East and West Valleys, Victor Valley, North-Western Desert, SB Mountains, Morongo Basin	2
2020 - 2023	Supplemental Services	East and West Valleys, Victor Valley, North-Western Desert, SB Mountains, Morongo Basin	2

HICAP	Program	Location	Number of Service Providers
2018-2021	HICAP	All RSAs	1
2018-2021	Financial Alignment and Medicaid, Medicare Improvements for Patients and Providers	All RSAs	1

Other Service Delivery Systems

211

The County's 211 information system is robust and provides detailed information via an 'Older Adults' link that can be accessed online by seniors. 211 also has the capacity to directly enroll seniors in Cal Fresh (the federal Supplemental Nutrition Assistance Program).

SIA Partnerships

The SIA staff partner with other government entities, non-profits, and for profit organizations to provide services to seniors throughout the County. For example, SIA is often contacted to provide utility assistance to make sure a senior has electricity or water if they fall behind on their bills. By partnering with the non-profit Senior Disabled Fund they are able to assist in limited bill paying to make sure that the older adult remains in a safe and healthy living environment.

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

San Bernardino County's Department of Aging and Adult Services (DAAS) is a unit of local county government and operates as a Department of San Bernardino County's Human Services. The Director of DAAS also serves as the designated AAA Director and as the Public Guardian of the County. DAAS provides services to seniors ages 60 and over, caregivers, individuals with disabilities, and adults age 18 and over in need of protection. The department works to ensure options are easily accessible to all older individuals and to have a visible resource where seniors can go or call for information. DAAS is actively involved with community resources to strengthen the service delivery system. The AAA continues to spearhead efforts to expand community education, discuss and share best practices, and consider evidence based programs. San Bernardino is one of seven California counties to participate in a three-year demonstration project called Cal MediConnect. The state Medi-Cal program and the federal Medicare program partnered to create this project to promote coordinated health care delivery to seniors and people with disabilities who are dually eligible for both of the public health insurance programs, or "dual eligible beneficiaries." The Cal MediConnect program aims to improve care coordination for dual eligible beneficiaries and drive high quality health care that helps people stay healthy and in their homes for as long as possible. Additionally, shifting services out of institutional settings and into the home and community helps create a person-centered health care system that is also sustainable.

The Office of the Public Guardian arranges for custodial care and administers estates of elderly, gravely disabled, or other incompetent persons by appointment of the courts and serves as guardian of conservatees' property and financial assets, and coordinates legal or social services on behalf of conservatees.

DAAS responsibilities include: Adult Protective Services (APS), In-Home Support Services (IHSS), the Multipurpose Senior Services Program, Older Americans Act (OAA) Programs, and the Office of the Public Guardian. The annual budget for the AAA is currently 9.4 million dollars. Federal, state and county dollars are included in the budget. Aging programs are provided by DAAS' staff (direct) and in conjunction with community-based organizations via county contracts.

Programs Provided Directly By DAAS

- Senior Information and Assistance (SIA) (Title IIIB and IIIE)
- Long Term Care Ombudsman, and Prevention of Elder Abuse, Neglect, and Exploitation (Title IIIB, Title VII and VIIA)
- Senior Community Service Employment Program (Title V)

Programs DAAS Contracts With Vendors

- Title IIIB—Supportive Services

Legal Assistance, Personal Care, Homemaker, Chore, Adult Day Care, Assisted Transportation, Residential Repair/Modification, and Senior Center Activities are the

services funded by IIIB. Vendors provide these services in varying regions of the County. Although each service was encouraged in each region, not every region had a vendor propose the service.

- Title IIIC—Elderly Nutrition Program

The AAA contracts with eight (8) providers to provide congregate and home delivered meals throughout the County. There are currently thirty-four (34) congregate meal sites in San Bernardino County. In fiscal year 2018/19, 9,086 people were served a balanced meal at the congregate sites and 2,355 persons received a home delivered meal.

- Title IIID— Disease Prevention and Health Promotion Program

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

- Title IIIE—Family Caregiver Support Program

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

- Health Insurance Counseling and Advocacy Program (HICAP)

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

Senior Affairs Commission (SAC)

The Senior Affairs Commission (SAC), established by the County's Board of Supervisors on July 2, 1973, consists of people who are residents of the County. The Commission membership consists of 21 members. Membership on the SAC is composed of three categories of members: Appointed, Representative and Professional. Currently there are six standing SAC committees: Access, Healthy Aging, Intergenerational, Executive, Legislative, and Nutrition.

Regional Councils on Aging (RCA)

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

SECTION 4. PLANNING PROCESS / ESTABLISHING PRIORITIES

The Department of Aging and Adult Services, as a County department in the larger Human Services group, is positioned to receive information from a variety of sources to address the needs and unmet needs of the County's seniors.

All meetings of the Senior Affairs Commission and the SAC Committees are open to the public and comply with Brown Act regulations. Community input is welcomed and encouraged and provides valuable input to the SAC and the department. The Regional Councils on Aging also provide a forum for public input.

Planning efforts in DAAS take many approaches.

Procurement of Services

The procurement process invokes a series of planning efforts. DAAS procurements for OAA services are on three year cycles to comply with County policies and procedures. Because of the time involved in processing a procurement, the services are rotated so that only two or three requests for services are solicited in a fiscal year. With each procurement service delivery is analyzed, the needs and unmet needs of the various regions are addressed, and staff develops a document to best address the seniors in the community. Ultimately, the delivery of services is contingent not only upon the availability of funding but also upon the presence of suitable providers willing and able to execute the contracts.

Needs Assessments

DAAS has a long standing relationship with the California State University San Bernardino Department of Social Work, Research Methods class to conduct yearly needs assessments. Examples include: use of congregate meal sites; a survey of gay, lesbian, transgender, bisexual elders; baby boomers and their attitudes towards senior centers and the activities offered; and internet use and barriers to use. The data gathered from these yearly efforts provides information on the senior population in the County. Staff use the data gathered for technical assistance and the department's planning efforts.

For the development of this four year plan, the department conducted a general needs assessment to direct planning efforts. (See Section 5. Needs Assessment)

Public Meetings and Public Hearings

For the development of the 2020-2024 Area Plan, four public meetings, and one public hearing were held throughout the County. Notice of the public meetings were distributed to members of the Senior Affairs Commission during their meetings and were emailed to the Regional Council on Aging Chairs. It was distributed by SIA staff at senior centers. Notice of the public hearing was mailed to providers, other interested parties, and city government offices located with the County. In addition, SIA staff posted the flyer in senior centers as well as distributing them at senior centers. As required by regulation, DAAS advertised the notice of public hearing 30 days in advance of the date in the San Bernardino Sun newspaper.

Senior Information and Assistance

The presence of SIA staff in the community provides another conduit for valuable information about concerns and issues to be directed to AAA administration. In the last fiscal year, the twelve SIA staff made 400 presentations and/or outreach visits to senior centers, senior housing, health and resource fairs, workshops and special events. The steady presence of SIA staff in the community cultivates a level of trust that enhances service delivery to the senior population.

SECTION 5. NEEDS ASSESSMENT

A general needs assessment for adults 60 and over was conducted by California State University, San Bernardino, Department of Social Work. Data was collected during the months of April and May in 2019, and participants were recruited from senior citizen centers, senior citizen complexes, community centers, grocery markets, and other places throughout the County. The study sample consisted of 513 participants that currently reside in San Bernardino County. The following tables represent the demographics of the participants.

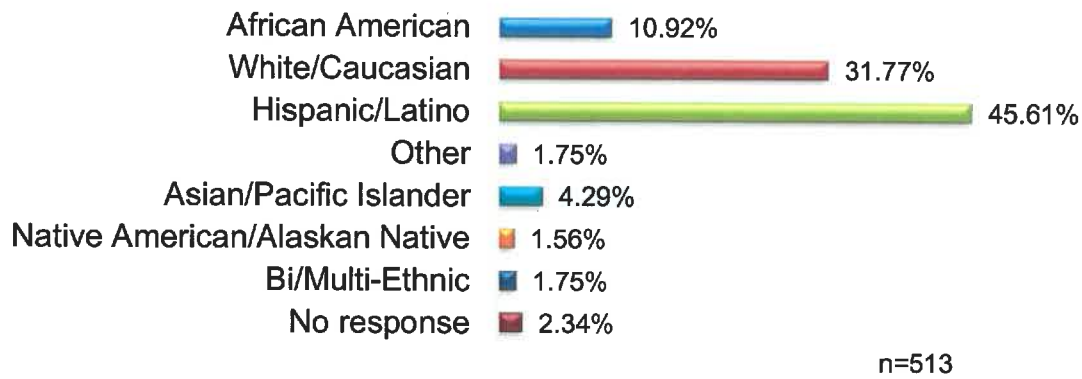
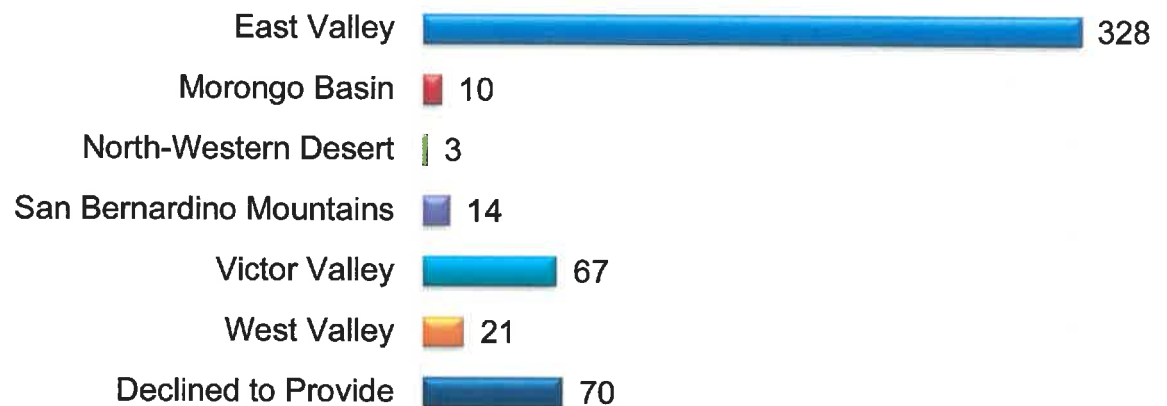
Demographics

Sex at Birth	Percent
Female	57.8
Male	41.6
Declined/Not stated	0.6

Gender	Percent
Female	57.8
Male	41.6
Gender queer/Gender non binary	0.2
Transgender Female to Male	0.6

Sexual Orientation/Identity	Percent
Straight/Heterosexual	91.7
Bisexual	1.8
Declined/Not stated	4.2
Gay/Lesbian/Same gender loving	1.6

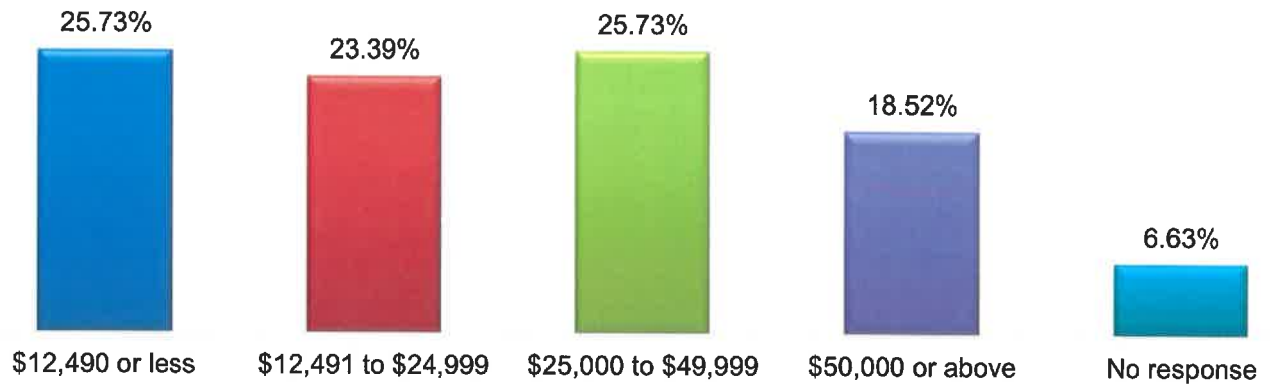
Age	Percent
60 - 69	57.2
70 – 79	26.7
80 – 89	13.9
90 or older	2.2

Respondents' Ethnicity**Respondents' Regions**

Education	Percent
K to 8 th grade	13.5
9 th to 12 th grade	35.9
Some College/AA	25.5
Technical school/Credential	6.9
College graduate (BA degree)	13.1
Graduate/Professional school	5.1

The survey used the 2019 Federal Poverty Level of \$12,490 and the annual income responses are summarized below:

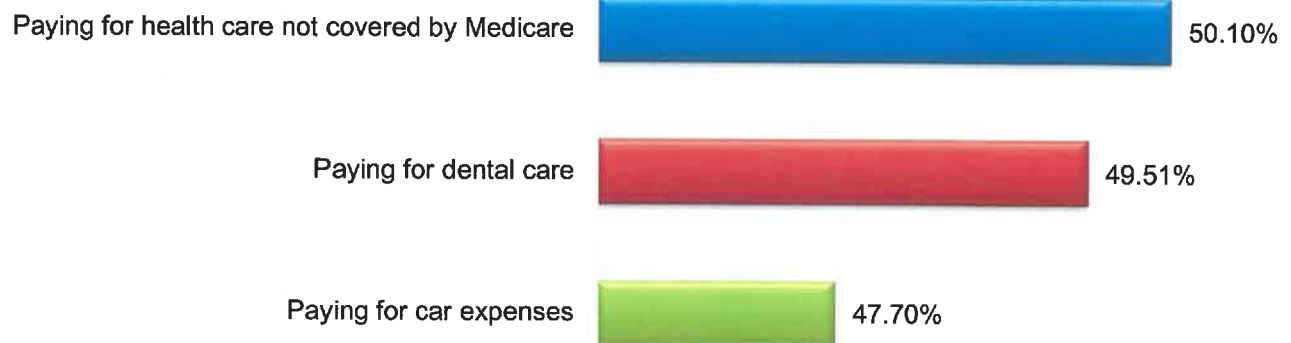
Respondents' Income



N=513

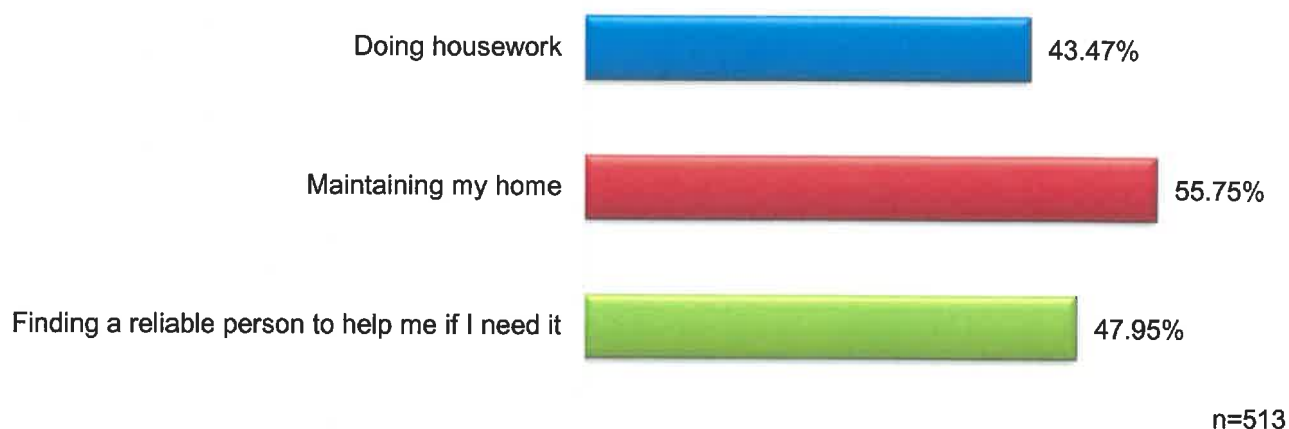
The participants' needs were assessed by looking at the categories of "frequently a problem" and "sometimes a problem." Respondents were allowed to select more than one answer. The most significant needs are summarized below:

Having enough money to meet my needs

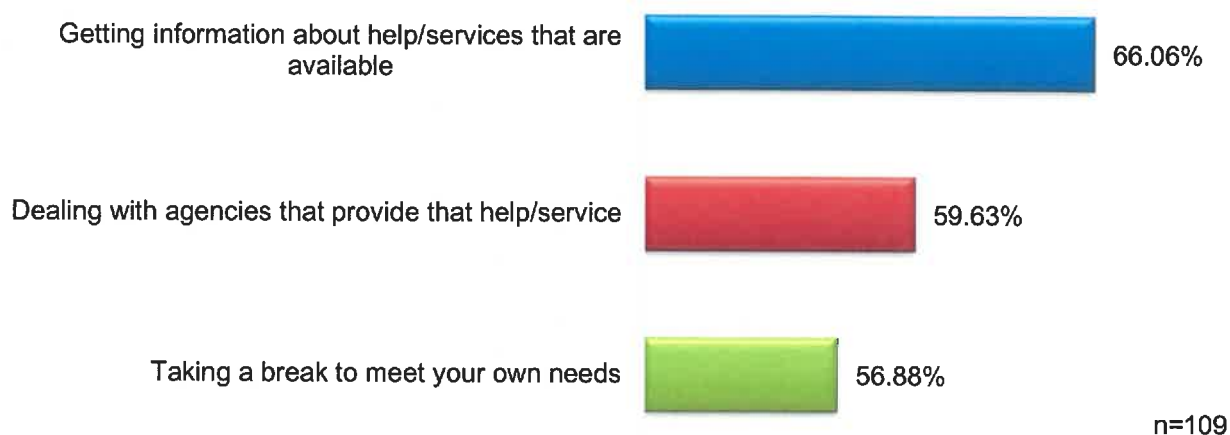


n=513

- Over 50% of respondents indicated that having enough money to meet their needs was frequently or sometimes a problem,
- Forty-nine percent also identified problems with paying for dental care, and
- Nearly 48% stated paying for car expenses were a problem.

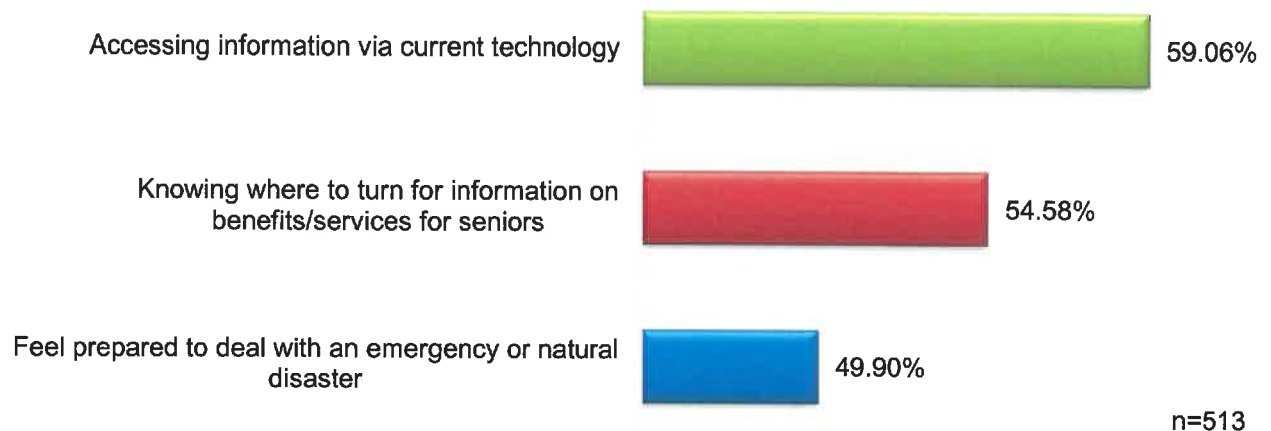
Living on my own

- The top three Issues identified when living alone included
 - Doing housework (43.47%),
 - Maintaining their home (55.75%), and
 - Finding a reliable person to help the responded, if needed (47.95%).

Services need in caregiving role

- Respondents who are caregivers identified the following as their top three problems:
 - Getting information about help/services that are available (66.06%),
 - Dealing with agencies that provide the help/service (59.63%), and
 - Taking a break to meet their own needs (56.88%).

Other Issues



The top three issues identified amongst respondents were:

- Accessing information via current technology (59.06%),
- Knowing where to turn for information on benefits/services for seniors (54.58%), and
- Feeling prepared to deal with an emergency or natural disaster (49.90%).

Resources

There are services and resources available throughout the County to assist the senior community with some of the needs identified above. The most efficient way for a senior to receive assistance is by calling the Senior Information and Assistance staff at 1-800-510-2020. In addition, San Bernardino County's 2-1-1 service was developed in collaboration with community-based services, County departments and is associated with the United Way. Both SIA and 211 can provide information about the Older American's Act (OAA) services as well as non-funded OAA resources.

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

FCSP provides a variety of support services to unpaid family caregivers. Program services include, but are not limited to respite care, support services, supplemental services, access assistance and information services. Currently there are two vendors providing these services and due to the geographical size of the County services might not be available in all areas. A careful analysis will be conducted to determine the needs of seniors in the County

Adequate Proportion

One of the many considerations for determining adequate proportion of Title III-B 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. III-B provides a variety of services to address functional limitations, maintain health, and independence and promote access

to services. The following is a list of services available: personal care, homemaker, chore, adult day care, case management, assisted transportation, transportation, legal assistance, information and assistance, and outreach.

Access Services

The Title III-B information and assistance program is the entry point to services for PSA 20. SIA staff assess individual needs, make referrals to local service or programs in the communities, and links individuals to the services and opportunities available in the community. 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 met. As such, a minimum percentage level 40% of III-B funds are allocated to access.

In-Home Services

Historically, PSA 20 has found that providing III-B Chore Services is financially costly and requires a high level of staff involvement. In addition, requests for these services in geographical isolated areas of the County are difficult to provide because of the availability vendors. As a result, a 5% of III-B funds will be allocated.

Legal Services

Legal services can be very expensive for seniors and are often a service of immediate need. PSA will allocate a minimum of 10% of III-B funds to Legal Assistance.

The responses of the assessment will also be shared with current III-B contracted providers to assist them in their outreach efforts in the communities they serve.

SECTION 6. TARGETING

Targeting Defined

The Older Americans Act requires that funds be targeted to older adults aged 60 and over with special emphasis on the following populations:

- older individuals residing in rural areas;
- older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas);
- older individuals with greatest social need (with particular attention to low-income minority individuals and older individuals residing in rural areas);
- older individuals with severe disabilities;
- older individuals with limited English proficiency;
- older individuals with Alzheimer's disease and related disorders with neurological and organic brain dysfunction (and the caretakers of such individuals); and
- older individuals at risk for institutional placement.

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.
- With severe disabilities.
- With limited English-speaking ability.
- With Alzheimer's disease or related disorders with neurological and organic brain dysfunction and the caretakers of these individuals.

Targeted Populations

The PSA 20 strives to meet the targeting requirements of the OAA and the California Code of Regulations. Target populations are spread throughout the 20,000 square miles of the County. We acknowledge that many seniors will never contact us about services or want services when they are made aware of them. Overall, older individuals living in remote and geographical isolated areas of the County present unique challenges as resources and providers are limited or nonexistent.

Older adults with the greatest economic need are distributed throughout the County. Financially, many seniors have needs at the federal poverty level but also at the levels identified by the Elder Index. Minority individuals tend to be concentrated in the valley area of the County where the majority of the population is located. The urbanized valley area has access to the greatest variety of resources, not only by number but also by variety of providers, including operations of local government, not-for-profit and for-profit service providers.

Generally, seniors located in the rural and isolated areas of the County have the greatest social need. The majority of rural populations are located in the mountains and the deserts. That is one of the primary reasons that PSA 20 provides III-B 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 seniors as well as an opportunity for the dissemination of accurate information. Senior Information and Assistance (SIA) staff visit these centers and provide outreach on a regular basis.

The Native American Indian and Alaska Native population is 2.1% (U.S. Census Bureau July 1, 2019) of the overall San Bernardino County population. Title III services are

available to all eligible County residents and SIA staff will initiate and focus outreach efforts to include this particular population.

In the remote and isolated areas of the County, there are a limited number of contracted service providers. An open contract procurement process is utilized with an emphasis to get the most desired and needed services to the target populations. Often no organization proposes to provide services, especially to the farthest reaching areas of the County. To minimize this impact, PSA 20 staff continually provides advice and technical assistance to our volunteer, and non-profit organizations striving to provide services in rural areas.

Senior Information and Assistance staff are located at six sites geographically dispersed throughout the County. From these locations they perform outreach to the senior community. SIA staff report an increase in need throughout the County for more bus passes, and home repair.

The PSA 20 continues to work on increasing minority participation. This is particularly important with the increase in the Hispanic/Latino population which is now at 54% (U.S. Census Bureau July 1, 2019). Brochures are available in English and Spanish, and several of the SIA staff are bilingual which enables them to assist those who are non-English speaking not only daily but also at health fairs and other community events.

The Senior Affairs Commission and the Regional Councils on Aging provide input about the needs of seniors. Frequently, the information is at the individual level of a particular senior as opposed to the global needs of seniors. They also communicate trends and concerns that they observe or discuss during their visits to senior centers and congregate feeding sites.

Finally, the COVID-19 pandemic has introduced challenges in PSA 20's efforts to serve target populations. However, new strategies were adopted in order to keep seniors safe while continuing to meet their needs. PSA 20 has taken the following action to conduct socially-distant outreach.

- Due to the closure of regular outreach locations (senior centers, senior housing complexes, and farmers markets) SIA staff initiated proactive outreach through check-in calls with registered clients.
- SIA staff have remained in contact with senior centers to keep track of their operations, plans, and COVID-19 services such as testing and meal distribution.
- DAAS partnered with 211 San Bernardino County to share a resource directory and dedicate two SIA staff members as resource specialists for direct referrals from 211.
- SIA assigned one staff member to serve as an on-call senior service specialist for the countywide Joint Information Center hotline.
- SIA maintained in-person appointments for cash/material aid distribution while abiding by strict social distancing guidelines.
- SIA extended its hours to 7:00 PM nightly and expanded its days of service to Saturdays and Sundays.
- Ombudsman has shifted its monitoring responsibilities to regular, comprehensive phone-based communication with facilities, and has served as a liaison between client families and facilities.

SECTION 7. PUBLIC HEARINGS

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

Fiscal Year	Date	Location	Number of Attendees	Presented in languages other than English?² Yes or No	Was hearing held at a Long-Term Care Facility?³ Yes or No
2020-2021	March 12, 2020	784 E. Hospitality Ln. San Bernardino, CA	13	No	No
2021-2022					
2022-2023					
2023-2024					

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

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

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

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

Public Meetings were scheduled at 4 different locations and coordinated with the Regional Councils on aging on the following dates:

East Valley – February 6, 2020

Victor Valley – February 11, 2020

Morongo Basin – February 13, 2020

West Valley – February 21, 2020

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

Area Plan surveys were distributed to Title IIIC-2 clients by delivery drivers and also distributed to LTC clients by Ombudsman staff. Senior Information and Assistance (SIA) staff distributed community input documents at senior centers as well as posting them for public viewing.

The Public Hearing was advertised in the San Bernardino Sun in accordance with California Code of Regulations, 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 feeding sites as well.

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 IIIB funds to meet the adequate proportion of funding for priority services.

- San Bernardino County Department of Aging and Adult Services should hire its own attorneys to directly provide legal assistance, advocacy for the senior population. (Legal)
- More outreach, information and assistance staff should visit the mountain region, and do so on a more frequent basis. (Access)

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

- Inquiries regarding access to services: payment assistance, affordable housing, assistance with technology, and transitional assistance (particularly state facilities).
- Family Caregiver Support Program does not offer enough hours of respite care
- Increased access to IHSS social workers

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

- Input from the public has been taken into consideration for future program expansion.

SECTION 8. IDENTIFICATION OF PRIORITIES

The Department of Aging and Adult Services (DAAS) is committed to serving the seniors in our community. Even with limited resources, DAAS is seeking out partnerships and collaborative efforts to leverage our funding and seek new sources of support. A continual evaluation process is used to strengthen our organizational capacity to meet changing needs and to improve the type and quality of the services being provided.

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

Other priorities emerged in the process but funding sources and provider service limitations impact addressing them. They are listed below and will be addressed depending on available funding and the availability of service providers. DAAS will also seek partners in the community to work with on these issues.

- Accessing information via current technology (Internet)
- Paying for dental care
- Maintaining a home (yard work & home repairs)
- Accessing information of available services for caregivers
- Dealing with agencies that provide help/service for caregivers

Meeting Targeting Populations

The AAA endeavors to comply with all Older American Act mandates. A thorough discussion of Targeting is outlined in Section 6 of the Area Plan.

Adequate Proportion

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

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

Based on these considerations, the minimum percentages are:

- Access Services 40%
- In-Home Services 5%
- Legal Assistance 10%

SECTION 9. AREA PLAN NARRATIVE GOALS AND OBJECTIVES

Goal #1: Focused Outreach to disseminate information and educate older adults, adults with disabilities and caregivers on available resources within PSA 20.

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

List Objective Number(s) and Objective(s) [Refer to CCR Article 3, Section 7300 (c)]	Projected Start and End Dates	Title IIIB Funded PD or C²	Update Status³
Objective #1: Participate and present information in quarterly meetings with the Senior Affairs Commission, Regional Councils on Aging and service providers to increase awareness of OAA resources for older adults, adults with disabilities, and caregivers throughout San Bernardino County.	07/01/20 – 06/30/24		
Objective #2: Senior Information and Assistance staff will provide outreach to targeted populations which include the following categories: minority 60 plus, low income 60 plus, geo-isolation 60 plus, and the Lesbian, Gay, Bisexual and Transgender (LGBT) community.	07/01/20 – 06/30/24		
Objective #3: Senior Information and Assistance staff will strengthen the awareness of PSA 20 programs and services by distributing comprehensive outreach materials at senior centers, senior housing complexes, health fairs, senior expos, and various senior related community events.	07/01/20 – 06/30/24		
Objective #4: Program Analyst will partner with providers to expand information about OAA programs to their clients. This will include distribution of informational flyers at congregate meal sites as well as delivery to C-2 clients at least annually.	07/01/20 – 06/30/24		
Objective #5: Quarterly presentations by DAAS staff on the number of Area Plan service units for direct and indirect services at the Senior Affairs Commission Meetings.	07/01/20 – 06/30/24		
Objective #6: During the COVID-19 pandemic, DAAS staff will increase client phone calls to provide socially-distant outreach to targeted populations.	07/01/20 – 06/30/24		

² Indicate if Program Development (PD) or Coordination (C) is the objective (cannot be both). If a PD objective is not completed in the timeline required and is continuing in the following year, any objective revision must state additional tasks.

³ Use for the Area Plan Updates only to indicate if the objective is New, Continued, Revised, Completed, or Deleted.

Goal #2: PSA 20 will evaluate and strengthen current services under the Family Caregiver Support Program (FCSP) for caregivers in order to ensure older adults, adults with disabilities, their families or informal caregivers receive information that will assist with their care and conditions.

Rationale: A need for information regarding caregiving services was identified. In order to improve the quality and quantity of informal care, it is essential for caregivers to be aware of available support services and programs available through PSA 20.

List Objective Number(s) and Objective(s) [Refer to CCR Article 3, Section 7300 (c)]	Projected Start and End Dates	Title IIIB Funded PD or C²	Update Status³
Objective #1: Increase awareness of programs and services to informal caregivers through focused outreach efforts by Senior Information and Assistance staff by providing community education on caregiving, and caregiving information and assistance at senior centers.	07/01/20 - 06/30/24		
Objective #2: Senior Information and Assistance staff will attend and distribute Family Caregiver Support Program information at senior centers, senior housing complexes, health fairs, Senior Expos, and various senior related community events.	07/01/20 - 06/30/24		
Objective #3: Collaborate with providers of service to evaluate and monitor the effectiveness of caregiving outreach, public information, community education, caregiver training, and caregiver information and assistance.	07/01/20 - 06/30/24		
Objective #4: Work with providers to ensure that caregivers are receiving current and pertinent information on topics related to caregiving.	07/01/20 - 06/30/24		
Objective #5: Work with providers to ensure that outreach efforts are conveying the availability of all Title E service categories.	07/01/20 - 06/30/24		

² Indicate if Program Development (PD) or Coordination (C) is the objective (cannot be both). If a PD objective is not completed in the timeline required and is continuing in the following year, any objective revision must state additional tasks.

³ Use for the Area Plan Updates only to indicate if the objective is New, Continued, Revised, Completed, or Deleted.

Goal #3: Certifying quality of services of contractors.			
Rationale: The quality of services and delivery of services by contractors will be improved through the use of quality assurance protocols and consistent performance monitoring in order to address the needs of program clients.			
List Objective Number(s) and Objective(s) [Refer to CCR Article 3, Section 7300 (c)]	Projected Start and End Dates	Title IIIB Funded PD or C²	Update Status³
Objective #1: Program Analysts will collect and review summaries of customer satisfaction surveys distributed by service providers. The results will be analyzed and provide discussed with the service providers. Feedback may include, but not be limited to positive comments, areas of improvement, and recommendations for additional services not currently offered. The Analyst will also provide technical assistance and suggestions to the service providers on survey results and development of survey questions.	07/01/20 - 06/30/24		
Objective #2: Survey results will be analyzed and the delivery of services will be discussed in the quarterly provider meetings to ensure concerns are being addressed and plans of correction are developed if necessary.	07/01/20 - 06/30/24		
Objective #3: Provider service unit targets will be monitored monthly by the assigned Analyst, and discussed in the monthly Provider Service Unit Report meetings to monitor performance targets of providers.	07/01/20 - 06/30/24		
Objective #4: Program monitoring will be conducted at least annually and more frequently if indicated to by the Program Analyst to measure performance on established contract service unit targets as well as all elements of the required provider work plan.	07/01/20 - 06/30/24		
Objective #5: Fiscal monitoring will be conducted at least annually and more frequently if indicated to ensure that all program funding is expended as required by regulations and to ensure services are being provide in the most cost effective manner.	07/01/20 - 06/30/24		
Objective #6: Improve data collection and integrity to better measure activity, performance and quality by training at least 3 more staff on the Wellsky software program so that data can be accessed efficiently to monitor Title III programs.	07/01/20 - 06/30/24		

Objective #7: Identify gaps in services by incorporating applicable questions to our service providers' customer satisfaction surveys. Survey results will provide a more concrete list of services needed by older adults in the PSA. The Office on Aging can use the identified gaps in services to leverage additional funding for the older population of San Bernardino County.	07/01/20 – 06/30/24		
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² Indicate if Program Development (PD) or Coordination (C) is the objective (cannot be both). If a PD objective is not completed in the timeline required and is continuing in the following year, any objective revision must state additional tasks.

³ Use for the Area Plan Updates only to indicate if the objective is New, Continued, Revised, Completed, or Deleted.

SECTION 10. SERVICE UNIT PLAN (SUP) OBJECTIVES

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

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

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

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

Personal Care (In-Home)

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	150	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

Homemaker (In-Home)

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	1,200	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

Chore (In-Home)

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	1,000	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	360,000	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	150	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

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

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

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	11,000	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	312,600	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

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

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

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	80,000		
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	5,000	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	10,000	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	30,000		
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	14,000	1	1 - 5
2021-2022			
2022-2023			
2023-2024			

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

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

Title IIIB, Other Priority and Non-Priority Supportive Services

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

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

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

Other Supportive Service Category

Unit of Service

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021			
2021-2022			
2022-2023			
2023-2024			

Title IIIB, Other Supportive Services Category

Residential Repairs /Modifications

Unit of Service = 1 Modification

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	100	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

Senior Center Activities

Unit of Service = 1 Hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	6,750	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

Cash/Material Aid**Unit of Service = 1 Assistance**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	350		
2021-2022			
2022-2023			
2023-2024			

Community Education**Unit of Service = 1 Activity**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	400		
2021-2022			
2022-2023			
2023-2024			

Housing**Unit of Service = 1 Hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	250		
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	3,000		
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	600		
2021-2022			
2022-2023			
2023-2024			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	1,550		
2021-2022			
2022-2023			
2023-2024			

Title IIID / Disease Prevention and Health Promotion

Instructions for Title IIID Disease Prevention and Health Promotion: Enter the name of the proposed program to be implemented, proposed units of service and the Program Goal and Objective number(s) that provide a narrative description of the program, and explain how the service activity meets the criteria for evidence-based programs described in PM 15-10 if not ACL approved.

Unit of Service = 1 contact

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

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

Service Activities: The Chronic Disease Self-Management Education and Tai Chi For Arthritis evidence-based programs will be offered at a minimum of two sites throughout the County.

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

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (Required)
2020-2021	850	3	1, 2, 3
2021-2022			
2022-2023			
2023-2024			

PSA 20
TITLE IIIB and Title VIIA:
LONG-TERM CARE (LTC) OMBUDSMAN PROGRAM OUTCOMES

2020-2024 Four-Year Planning Cycle

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

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

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

Complete all Measures and Targets for Outcomes 1-3;

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

Measures and Targets:

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

1. FY 2018-2019 Baseline Resolution Rate:

Number of complaints resolved **951** + number of partially resolved complaints **132** divided by the total number of complaints received **1678** = Baseline Resolution Rate **65%** FY 2020-2021 Target Resolution Rate **70%**

2. FY 2019-2020 Baseline Resolution Rate:

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

3. FY 2020 - 2021 Baseline Resolution Rate:

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

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

Program Goals and Objective Numbers: ____

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

1. FY 2018-2019 Baseline: Number of Resident Council meetings attended 23
 FY 2020-2021 Target: 15
2. FY 2019-2020 Baseline: Number of Resident Council meetings attended _____
 FY 2021-2022 Target: _____
3. FY 2020-2021 Baseline: Number of Resident Council meetings attended _____
 FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Resident Council meetings attended _____
 FY 2023-2024 Target: _____

Program Goals and Objective Numbers: ____

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

1. FY 2018-2019 Baseline: Number of Family Council meetings attended 20
 FY 2020-2021 Target: 5
2. FY 2019-2020 Baseline: Number of Family Council meetings attended _____
 FY 2021-2022 Target: _____
3. FY 2020-2021 Baseline: Number of Family Council meetings attended _____
 FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Family Council meetings attended _____
 FY 2023-2024 Target: _____

Program Goals and Objective Numbers: ____

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

1. FY 2018-2019 Baseline: Number of Instances 287
 FY 2020-2021 Target: 500
2. FY 2019-2020 Baseline: Number of Instances _____
 FY 2021-2022 Target: _____
3. FY 2020-2021 Baseline: Number of Instances _____
 FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Instances _____
 FY 2023-2024 Target: _____

Program Goals and Objective Numbers: ____

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

1. FY 2018-2019 Baseline: Number of Instances 993 FY 2020-2021 Target: 1,200
2. FY 2019-2020 Baseline: Number of Instances _____ FY 2021-2022 Target: _____
3. FY 2020-2021 Baseline: Number of Instances _____ FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Instances _____ FY 2023-2024 Target: _____
Program Goals and Objective Numbers: ____

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

1. FY 2018-2019 Baseline: Number of Sessions 10 FY 2020-2021 Target: 10
2. FY 2019-2020 Baseline: Number of Sessions _____ FY 2021-2022 Target: _____
3. FY 2020-2021 Baseline: Number of Sessions _____ FY 2022-2023 Target: _____
4. FY 2021-2022 Baseline: Number of Sessions _____ FY 2023-2024 Target: _____
Program Goals and Objective Numbers: ____

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

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

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

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

FY 2020-2021
FY 2020-2021 Systems Advocacy Effort(s): The LTC Ombudsman Program will work with the Terracina Post Acute facility to improve LTC residents' quality of care and quality of life. Responsibility will include identifying most common complains and/or care issues affecting the residents and work to improve those issues for the benefit of residents.
FY 2021-2022
Outcome of FY 2020-2021 Efforts:
FY 2021-2022 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)
FY 2022-2023
Outcome of FY 2021-2022 Efforts:
FY 2022-2023 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)
FY 2023-2024
Outcome of 2022-2023 Efforts:
FY 2023-2024 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 2016), Section 712(a)(3)(D), (5)(B)(ii)]

Measures and Targets:

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

1. FY 2018-2019 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint <u>47</u> divided by the total number of Nursing Facilities <u>54</u> = Baseline <u>87%</u> FY 2020-2021 Target: <u>87%</u>
2. FY 2019-2020 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 2021-2022 Target: _____%
3. FY 2020-2021 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 2022-2023 Target: _____%
4. FY 2021-2022 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 2023-2024 Target: _____%
Program Goals and Objective Numbers: _____

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

1. FY 2018-2019 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint <u>110</u> divided by the total number of RCFEs <u>246</u> = Baseline <u>45%</u> FY 2020-2021 Target: <u>65%</u>
2. FY 2019-2020 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 2021-2022 Target: _____%
3. FY 2020-2021 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 2022-2023 Target: _____%
4. FY 2021-2022 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 2023-2024 Target: _____%
Program Goals and Objective Numbers: _____

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

1. FY 2018-2019 Baseline: 6.55 FTEs FY 2020-2021 Target: 6.55 FTEs
2. FY 2019-2020 Baseline: _____ FTEs FY 2021-2022 Target: _____ FTEs
3. FY 2020-2021 Baseline: _____ FTEs FY 2022-2023 Target: _____ FTEs
4. FY 2021-2022 Baseline: _____ FTEs FY 2023-2024 Target: _____ FTEs
Program Goals and Objective Numbers: _____

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

1. FY 2018-2019 Baseline: Number of certified LTC Ombudsman volunteers: 28 FY 2020-2021 Projected Number of certified LTC Ombudsman volunteers: 25
2. FY 2019-2020 Baseline: Number of certified LTC Ombudsman volunteers: _____ FY 2021-2022 Projected Number of certified LTC Ombudsman volunteers: _____
3. FY 2020-2021 Baseline: Number of certified LTC Ombudsman volunteers: _____ FY 2022-2023 Projected Number of certified LTC Ombudsman volunteers: _____
4. FY 2021-2022 Baseline: Number of certified LTC Ombudsman volunteers: _____ FY 2023-2024 Projected Number of certified LTC Ombudsman volunteers: _____
Program Goals and Objective Numbers: _____

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

Measures and Targets:

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

Some examples could include:

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

Reporting data improvements will be accomplished by implementing new, innovative, and ongoing training for current and new staff.

TITLE VIIA ELDER ABUSE PREVENTION SERVICE UNIT PLAN OBJECTIVES

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

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

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

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

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

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

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

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

TITLE VIIA ELDER ABUSE PREVENTION SERVICE UNIT PLAN OBJECTIVES

The agency receiving Title VIIA Elder Abuse Prevention funding is:

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

Fiscal Year	Total # of Public Education Sessions
2020-2021	10
2021-2022	
2022-2023	
2023-2024	

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

Fiscal Year	Total # of Training Sessions for Caregivers served by Title III E
2020-2021	
2021-2022	
2022-2023	
2023-2024	

Fiscal Year	Total # of Hours Spent Developing a Coordinated System
2020-2021	40
2021-2022	
2022-2023	
2023-2024	

Fiscal Year	Total # of Copies of Educational Materials to be Distributed	Description of Educational Materials
2020-2021	1,500	Brochures for the elder abuse prevention program
2021-2022		

Fiscal Year	Total # of Copies of Educational Materials to be Distributed	Description of Educational Materials
2022-2023		
2023-2024		

Fiscal Year	Total Number of Individuals Served
2020-2021	1,000
2021-2022	
2022-2023	
2023-2024	

TITLE III E SERVICE UNIT PLAN OBJECTIVES

CCR Article 3, Section 7300(d) 2020-2024 Four-Year Planning Period

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

Direct and/or Contracted III E Services

CATEGORIES	1	2	3
Family Caregiver Services Caring for Elderly	<i>Proposed</i> Units of Service	<i>Required</i> Goal #(s)	<i>Optional</i> Objective #(s)
Information Services	# of activities and Total est. audience for above		
2020-2021	# of activities: 300 Total est. audience: 3,000	2	
2021-2022	# of activities: Total est. audience:		
2022-2023	# of activities: Total est. audience:		
2023-2024	# of activities: Total est. audience:		
Access Assistance	Total contacts		
2020-2021	15,075	2	
2021-2022			
2022-2023			
2023-2024			

Access Assistance		Total contacts	
Support Services	Total hours		
2020-2021	4,200	2	
2021-2022			
2022-2023			
2023-2024			
Respite Care	Total hours		
2020-2021	3,000	2	
2021-2022			
2022-2023			
2023-2024			
Supplemental Services	Total occurrences		
2020-2021	150	2	
2021-2022			
2022-2023			
2023-2024			

Direct and/or Contracted IIIE Services

Grandparent Services Caring for Children	<i>Proposed</i> Units of Service	<i>Required</i> Goal #(s)	<i>Optional</i> Objective #(s)
Information Services	# of activities and Total est. audience for above		
2020-2021	# of activities: 60 Total est. audience: 300	2	
2021-2022	# of activities: Total est. audience:		
2022-2023	# of activities: Total est. audience:		
2023-2024	# of activities: Total est. audience:		

Grandparent Services Caring for Children	<i>Proposed</i> Units of Service	<i>Required</i> Goal #(s)	<i>Optional</i> Objective #(s)
Access Assistance	Total contacts		
2020-2021	1,050	2	
2021-2022			
2022-2023			
2023-2024			
Support Services	Total hours		
2020-2021			
2021-2022			
2022-2023			
2023-2024			
Respite Care	Total hours		
2020-2021			
2021-2022			
2022-2023			
2023-2024			
Supplemental Services	Total occurrences		
2020-2021			
2021-2022			
2022-2023			
2023-2024			

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

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

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

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

The new five federal PMs generally reflect the former seven PMs (PM 2.1 through PM 2.7), except for PM 2.7, (Total Counseling Hours), which was removed because it is already being captured under the *SHIP Annual Resource Report*. As a part of these changes, ACL eliminated the performance-based funding scoring methodology and replaced it with a Likert scale comparison model for setting National Performance Measure Targets that define the proportional penetration rates needed for improvements.

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

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

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

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

HICAP Legal Services Units of Service (if applicable) ⁶

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

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

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

⁶ Requires a contract for using HICAP funds to pay for HICAP Legal Services.

SECTION 11. FOCAL POINTS**COMMUNITY FOCAL POINTS LIST**

CCR Title 22, Article 3, Section 7302(a)(14), 45 CFR Section 1321.53(c), OAA 2006
306(a)

In the form below, provide the current list of designated community focal points and their addresses. This information must match the total number of focal points reported in the National Aging Program Information System (NAPIS) State Program Report (SPR), i.e., California Aging Reporting System, NAPISCare, Section III.D.

Name	Address	City/Community	Phone
Adelanto Senior Center	11565 Cortez Road	Adelanto, CA, 92301	(760) 605-0549
Apple Valley Senior Club	13188 Central Road	Apple Valley, CA, 92308	(760) 247-3155
Barstow Senior Citizen Club	555 Melissa Avenue	Barstow, CA, 92311	(760) 256-5023
Bear Valley Senior Center	42651 Big Bear Boulevard	Big Bear Lake, CA, 92315	(909) 584-0323
Bonnie Baker Senior Citizens Club	149356 Ukiah Trail	Big River, CA, 92242	(760) 665-2667
13170 Chemehuevi Indian Tribal Center	1990 Palo Verde	Havasupai Lake, CA, 92363	(760) 858-4219
Chino Senior Center	13170 Central Avenue	Chino, CA, 91710	(909) 334-3453
Crest Forrest Senior Citizens Club	24658 San Moritz Drive	Crestline, CA, 92325	(909) 338-5036
Dino Papavero Senior Center	16707 Magnolia Avenue	Fontana, CA, 92335	(909) 350-0575
Fontana Community Senior Center	16710 Ceres Avenue	Fontana, CA, 92335	(909) 854-5151
Ft. Mojave Tribal Senior Nutrition Program	700 Harrison Street	Needles, CA, 92363	(760) 629-2371
George M. Gibson Senior Center	250 N. Third Avenue	Upland, CA, 91786	(909) 891-4501
George White Senior Center	8565 Nuevo Avenue	Fontana, CA, 92335	(909) 822-4493
Grace Vargas Senior Center	1411 S. Riverside Avenue	Rialto, CA, 92376	(909) 877-9706
Grand Terrace Senior Center	22627 Grand Terrace Road	Grand Terrace, CA, 92313	(909) 824-1091
Helendale Senior Center	15350 Riverview Road Bldg. #2	Helendale, CA, 92342	(760) 243-5690
Hesperia Leisure League	9122 Third Avenue	Hesperia, CA, 92345	(760) 244-3223
Highland Senior Center	3102 E. Highland Avenue	Patton, CA, 92369	(909) 862-8104
Hinkley Community and Senior Center	35997 Mountain View Road	Hinkley, CA, 92347	(760) 253-4677
Hutton Senior Center	660 Colton Avenue	Colton, CA, 92324	(909) 370-6168
James L. Brutle Senior Center	11200 Baseline Road	Rancho Cucamonga, CA, 91701	(909) 477-2780

Joshua Tree Community Center	6171 Sunburst	Joshua Tree, CA, 92252	(760) 366-2471
Joslyn Senior Center	21 Grant Street	Redlands, CA, 92373	(909) 798-7550
Loma Linda Senior Center	25571 Barton Road	Loma Linda, CA, 92354	(909) 799-2820
Luque Family Center	292 East "O" Street	Colton, CA, 92324	(909) 370-5087
Lytle Creek Community Center	380 S. "K" Street	San Bernardino, CA 92410	(909) 384-5424
Mentone Senior Center	1331 Opal Avenue	Mentone, CA, 92359	(909) 794-5280
Montclair Senior Center	5111 Benito Street	Montclair, CA, 91763	(909) 625-9483
Morongo Basin Senior Center	57121 Sunnyslope Drive	Yucca Valley, CA, 92284	(760) 356-9661
Mountain Communities Senior Center	675 Grandview Road	Twin Peaks, Ca, 92391	(909) 337-1824
Needles Senior Center	1699 Bailey Avenue	Needles, CA, 92363	(760) 326-4789
Newberry Springs Family Center	33383 Newbery Road	Newberry Springs, CA, 92365	(760) 257-3284
Ontario Senior Center	225 East "B" Street	Ontario, CA, 91764	(909) 395-2021
Percy Baker Community Center	P.O. Box 104055/ 9333 E Avenue	Hesperia, CA, 92340	(760) 244-5488
Perris Hill Senior Center	780 E. 21 Street	San Bernardino, CA 92404	(909) 384-5436
Phelan Senior Center	4128 Warbler Road #A	Phelan, CA, 92371	(760) 868-8067
Pinon Hills Senior Club	10433 Mountain Road	Pinion Hills, CA, 92374	(909) 868-6637
Redlands Community Senior Center	11 W. Lugonia Road	Redlands, CA, 92374	(909) 798-7579
Rudy Hernandez Community Center	222 N. Lugo Ave	San Bernardino, CA, 92408	(909) 384-5420
San Bernardino 5th St Senior Center	600 W. Fifth Street	San Bernardino, CA, 92410	(909) 384-5430
San Moritz Lodge	24658 San Moritz Drive	Crestline, CA, 92325	(909) 338-5036
Trona Community Senior Center	13187 Market Street	Trona, CA, 93562	(760) 372-5889
Twenty Nine Palms Senior Center	6539 Adobe Road	Twenty Nine Palms, CA, 92277	(760) 367-3891
Victorville Senior Center	14874 Mojave Road	Victorville, CA, 92392	(760) 245-5018
Wrightwood community Center	1543 Barbara Street	Wrightwood, CA, 92397	(760) 249-3205
Yucaipa Senior Center	12202 First Street	Yucaipa, CA, 92399	(909) 797-1177
Yucca Valley Senior Center	57088 29 Palms Highway	Yucca Valley, CA, 92284	(760) 228-5453

Following are the addresses of the Department of Aging and Adult Services offices.

City	Address	Zip	Phone
Barstow	536 East Virginia Way	92311	(760) 256-5544
Needles	1090 East Broadway St	92363	(760) 326-9328
Rancho Cucamonga	9445 Fairway View Place, Suite 110	91730	(909) 948-6200
San Bernardino	784 East Hospitality Lane	92415	(909) 891-3700
Victorville	17270 Bear Valley Road, Suite 108	92395	(760) 243-8400
Yucca Valley	56357 Pima Trail	92284	(760) 228-5390

SECTION 12. DISASTER PREPAREDNESS

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

1. Describe how the AAA coordinates its disaster preparedness plans and activities with local emergency response agencies, relief organizations, state and local governments, and other organizations responsible for emergency preparedness and response as required in OAA, Title III, Section 310:

The AAA is a department within San Bernardino County Human Services System, and is included in the County's comprehensive disaster preparation planning. San Bernardino County Fire Office of Emergency Services, as the Operational Area for the County, coordinates the development and implementation of the disaster plan. DAAS Emergency Operations Plan describes the roles, responsibilities and relationships of the Department consistent with the Standardized Emergency Management systems (SEMS) and the National Incident Management System (NIMS), as they relate to disaster response. SEMS incorporates the use of the Incident Command System (ICS), the Master Mutual Aid Agreement, existing mutual aid systems, the operational area concept, and multiagency or inter-agency coordination. Local governments must use SEMS to be eligible for funding of their personnel related costs under state disaster assistance programs. At the field (incident) level, the use of SEMS standardizes the response to emergencies involving multiple jurisdictions or multiple agencies. The Incident Command System (ICS) is the basic emergency management system. ICS provides a common organizational framework within which agencies can work collectively at the scene of an emergency. ICS is also an effective emergency management system for either single or multiple agency use. DAAS will activate the Department Emergency Operation Center (DOC) in the event of a disaster. The DOC will establish a system to receive and process task assignments, establish an outline of steps to secure the safety of department personnel, establish a system to provide the necessary resources as needed, ensure the continuing performance of the department's essential operations/functions, and establish a plan of action for restoring normal day-to-day operations. Emergency response sections will be established in the DOC as described in the Emergency Operations Plan. In alignment with SEMS and NIMS, DOC staff has been designated to one of the following sections: Management, Operations, Planning, Logistics, and Finance. Critical functions have been identified below. Essential Disaster Response functions include:

- a. Ensure all records, documents, critical supplies, and other items needed to perform critical functions are available offsite and/or can be readily obtained if the facility is lost.
- b. Check on the most vulnerable clients from all programs.
- c. Coordinate assistance to vulnerable clients with OES and first responders.
- d. Provide disaster information in alternative languages as necessary.
- e. Investigate APS reports.

A decision making process in disaster settings has been put in place to ensure that there is continuity of operations (COOP). If the disaster is regional, the disaster plan will be implemented at the regional level. Communication may be from the bottom up. For a countywide disaster, the disaster plan will be implemented by the Director or successor, based on the lines of succession established in the plan. The Director will oversee the relief efforts conducted by the department. The Deputy Directors and District Managers will provide information to the Director about each Region and financial concerns. The Deputy Directors will supervise and coordinate relief efforts in their respective regions as well as specific activities based on their assignments. The District Manager will coordinate the establishment of emergency sites for provision of food/nutrition along with the assignment of Senior Information and Assistance staff to Senior Centers and nutrition sites. The other Deputy Directors will coordinate efforts in their regions and maintain contact with regional supervisors. Authority for DAAS operations will be the responsibility of the highest-level employee.

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	E-mail
Daniel Munoz	Emergency Services Manager	Office: 909-356-3943 Cell: 909-855-6234	Daniel.Munoz@oes.sbcounty.gov

3. Identify the Disaster Response Coordinator within the AAA:

Name	Title	Telephone	E-mail
Christopher Tarr	Deputy Director	Office: 760-243-8489 Cell: 760-401-1353	ctarr@hss.sbcounty.gov

4. List critical services the AAA will continue to provide after a disaster and describe how these services will be delivered:

Critical Services	Method of Delivery
Check on most vulnerable clients	Program staff has disaster contact sheets used to document if the client has a live-in care provider or not, is on oxygen, is bed bound, etc. The most dependent clients are contacted during a disaster
Coordinate with first responders	Department Disaster Coordinators assigned to each facility will conduct a self-assessment of the staff, visitors, and facility and report back to DOC.
Investigate Adult Protective Services reports	Deputy Directors will supervise and coordinate relief efforts in their respective regions as well as specific activities based on their assignments.

5. List any agencies with which the AAA has formal emergency preparation or response agreements.

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

6. Describe how the AAA will:

- Identify vulnerable populations.

Each program identifies vulnerable service populations by keeping disaster contact sheets numbered according to their needs assessment and whether there is a live-in care provider or not. The highest priority clients are those who do not have live-in help and who are dependent on oxygen or other durable medical equipment. Social Workers keep in touch with these high priority clients during any disaster.

- Follow-up with these vulnerable populations after a disaster event.

The DAAS social workers keep in touch with high priority clients after any disaster.

SECTION 13. PRIORITY SERVICES

2020-2024 Four-Year Planning Cycle

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

The CCR, Article 3, Section 7312, requires the AAA to allocate an “adequate proportion” of federal funds to provide Access, In-Home Services, and Legal Assistance in the PSA. The annual minimum allocation is determined by the AAA through the planning process. The minimum percentages of applicable Title III B funds⁷ listed below have been identified for annual expenditure throughout the four-year planning period. These percentages are based on needs assessment findings, resources available within the PSA, and discussions at public hearings on the Area Plan.

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

Access:

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

20-21 <u>40%</u>	21-22 <u>40%</u>	22-23 <u>40%</u>	23-24 <u>40%</u>
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In-Home Services:

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

20-21 <u>5%</u>	21-22 <u>5%</u>	22-23 <u>5%</u>	23-24 <u>5%</u>
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Legal Assistance Required Activities:⁸

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

20-21 <u>10%</u>	21-22 <u>10%</u>	22-23 <u>10%</u>	23-24 <u>10%</u>
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Explain how allocations are justified and how they are determined to be sufficient to meet the need for the service within the PSA.

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

⁷ 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.

⁸ Legal Assistance must include all the following activities: Legal Advice, Representation, Assistance to the Ombudsman Program and Involvement in the Private Bar.

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

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

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

<u>Check applicable direct services</u>	<u>Check each applicable Fiscal Year</u>			
Title IIIB	20-21	21-22	22-23	23-24
☒ Information and Assistance	☒	☒	☒	☒
☐ Case Management	☐	☐	☐	☐
☒ Outreach	☒	☒	☒	☒
☐ Program Development	☐	☐	☐	☐
☐ Coordination	☐	☐	☐	☐
☒ Long Term Care Ombudsman	☒	☒	☒	☒
Title IID	20-21	21-22	22-23	23-24
☐ Disease Prevention and Health Promo.	☐	☐	☐	☐
Title IIIE⁹	20-21	21-22	22-23	23-24
☒ Information Services	☒	☒	☒	☒
☒ Access Assistance	☒	☒	☒	☒
☐ Support Services	☐	☐	☐	☐
Title VIIA	20-21	21-22	22-23	23-24
☒ Long Term Care Ombudsman	☒	☒	☒	☒
Title VII	20-21	21-22	22-23	23-24
☒ Prevention of Elder Abuse, Neglect, and Exploitation.	☒	☒	☒	☒

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

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

The AAA will continue and expand outreach efforts to create additional partnerships and collaborations to reach the senior community. The objectives include enhancing transportation

services, working with local Farmers' Markets to make sure low income seniors can use the Farmers' Market check booklets throughout the County, and ensuring the success and effectiveness of the Scam Alert program.

⁹ Refer to PM 11-11 for definitions of Title III E categories.

SECTION 15. REQUEST FOR APPROVAL TO PROVIDE DIRECT SERVICES

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

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

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

Identify Service Category: Cash / Material Aid

Check applicable funding source:¹⁰

☒ IIIB

☐ IIIC-1

☐ IIIC-2

☐ IIID

☐ IIIE

☐ VIIA

☐ HICAP

Request for Approval Justification:

☐ Necessary to Assure an Adequate Supply of Service OR

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

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

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

¹¹ Section 15 does not apply to Title V (SCSEP).

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

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

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

² For a HICAP direct services waiver, the managing AAA of HICAP services must document that all affected AAAs are in agreement .

SECTION 15. REQUEST FOR APPROVAL TO PROVIDE DIRECT SERVICES

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

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

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

Identify Service Category: Housing

Check applicable funding source:¹⁰

☒ IIIB

☐ IIIC-1

☐ IIIC-2

☐ IIID

☐ IIIE

☐ VIIA

☐ HICAP

Request for Approval Justification:

☐ Necessary to Assure an Adequate Supply of Service OR

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

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

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

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

¹¹ Section 15 does not apply to Title V (SCSEP).

The AAA maintains six Senior Information and Assistance (SIA) offices strategically located to

serve the entire PSA, distribute information about resources, and provide direct services in both Titles IIIB and IIIE. SIA staff are committed to identifying service gaps, assisting seniors in accessing resources, and following up on the provision of services in a timely manner. They perform outreach efforts at senior centers, nutrition sites, mobile home parks, senior apartment complexes, food distribution sites, and health and resource fairs. SIA staff also attend community meetings and events where they make available information about services throughout the AAA.

SIA staff answers a number of Housing inquiries. They provide information about senior housing, senior mobile home parks, and low income housing located throughout the County

² Section 15 does not apply to Title V (SCSEP).

³ For a HICAP direct services waiver, the managing AAA of HICAP services must document that all affected AAAs agree.

SECTION 15. REQUEST FOR APPROVAL TO PROVIDE DIRECT SERVICES

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

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

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

Identify Service Category: Interpretation / Translation

Check applicable funding source:¹⁰

☒ IIIB

☐ IIIC-1

☐ IIIC-2

☐ IIID

☐ IIIE

☐ VIIA

☐ HICAP

Request for Approval Justification:

☐ Necessary to Assure an Adequate Supply of Service OR

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

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

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

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

¹¹ Section 15 does not apply to Title V (SCSEP).

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

SIA staff provides Interpretation and Translation to the senior minority population. This can be from a general phone call to attending a health fair and providing bilingual information. Additionally, SIA staff also translates letters and other documents, and translates and assists with applications for benefits and services.

² Section 15 does not apply to Title V (SCSEP).

³ For a HICAP direct services waiver, the managing AAA of HICAP services must document that all affected AAAs agree.

SECTION 15. REQUEST FOR APPROVAL TO PROVIDE DIRECT SERVICES

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

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

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

Identify Service Category: Mobility Management Activities

Check applicable funding source:¹⁰

☒ IIIB

☐ IIIC-1

☐ IIIC-2

☐ IIID

☐ IIIE

☐ VIIA

☐ HICAP

Request for Approval Justification:

☐ Necessary to Assure an Adequate Supply of Service OR

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

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

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

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

¹¹ Section 15 does not apply to Title V (SCSEP).

The AAA maintains six Senior Information and Assistance (SIA) offices strategically located to

serve the entire PSA, distribute information about resources, and provide direct services in both Titles IIIB and IIIE. SIA staff are committed to identifying service gaps, assisting seniors in accessing resources, and following up on the provision of services in a timely manner. They perform outreach efforts at senior centers, nutrition sites, mobile home parks, senior apartment complexes, food distribution sites, and health and resource fairs. SIA staff also attend community meetings and events where they make available information about services throughout the AAA.

SIA staff provides presentations on the various transportation options that exist throughout San Bernardino County. When they issue bus passes they often describe the schedule and provide trip planning. SIA staff also presents the various volunteer driver options that exist in San Bernardino County. SIA staff attends and provide testimony at unmet transportation needs hearings throughout the County; they collect information from seniors about their unmet transit needs which may include petitions or anecdotal testimony.

² Section 15 does not apply to Title V (SCSEP).

³ For a HICAP direct services waiver, the managing AAA of HICAP services must document that all affected AAAs agree.

SECTION 15. REQUEST FOR APPROVAL TO PROVIDE DIRECT SERVICES

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

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

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

Identify Service Category: Personal Affairs Assistance

Check applicable funding source:¹⁰

☒ IIIB

☐ IIIC-1

☐ IIIC-2

☐ IIID

☐ IIIE

☐ VIIA

☐ HICAP

Request for Approval Justification:

☐ Necessary to Assure an Adequate Supply of Service OR

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

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

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

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

¹¹ Section 15 does not apply to Title V (SCSEP).

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

SIA staff provides Personal Affairs Assistance throughout the year. Examples include Medi-Cal/Medicare applications, income tax forms, housing applications, and HEAP (Home Energy Assistance Program) applications.

Section 15 does not apply to Title V (SCSEP).

² For a HICAP direct services waiver, the managing AAA of HICAP services must document that all affected AAAs agree.

SECTION 15. REQUEST FOR APPROVAL TO PROVIDE DIRECT SERVICES

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

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

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

Identify Service Category: Transportation

Check applicable funding source:¹⁰

☒ IIIB

☐ IIIC-1

☐ IIIC-2

☐ IIID

☐ IIIE

☐ VIIA

☐ HICAP

Request for Approval Justification:

☐ Necessary to Assure an Adequate Supply of Service OR

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

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

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

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

¹¹ Section 15 does not apply to Title V (SCSEP).

The AAA maintains six Senior Information and Assistance (SIA) offices strategically located to

serve the entire PSA, distribute information about resources, and provide direct services in both Titles IIIB and IIIE. SIA staff are committed to identifying service gaps, assisting seniors in accessing resources, and following up on the provision of services in a timely manner. They perform outreach efforts at senior centers, nutrition sites, mobile home parks, senior apartment complexes, food distribution sites, and health and resource fairs. SIA staff also attend community meetings and events where they make available information about services throughout the AAA.

DAAS directly receives many requests annually for assistance with public transportation services through the 1-800-510-2020 number. In addition, 2-1-1 has also observed that transportation is an unmet need. In order to assist seniors with transportation needs, DAAS works with five of the six transit operators in the County to purchase bus passes. The five agencies are: Mountain Transit, Needles Area Transit (NAT), San Bernardino Valley Omnitrans, Morongo Basin Transit Authority (MBTA) and the Victor Valley Transit Authority (VVTa). Five of the six agencies (Needles does not) provide specialized access transportation services to senior and disabled persons. Foothill Transit Agency serves the most easterly, urbanized region of the County with rides directed to LA County. A not for profit agency has a viable volunteer driver program that serves the senior community in this area.

The County of San Bernardino can be more cost effective and service efficient in providing regular bus passes and access bus passes because of the following:

- We are the only IIIB transportation provider serving all areas of the County.
- Our SIA staff has existing relationships with local transportation agencies.
- Our SIA program holds various countywide outreach efforts all year-long.
- Our County can negotiate government price discounts.
- There is no additional administrative overhead cost to provide this service.
- The County has existing staff, policies, procedures, and practices in place to administer this service in the most efficient and cost effective manner (successful similar programs include: Farmer's Market Coupons and Adult Protective Services Tangibles).

¹⁰ Section 15 does not apply to Title V (SCSEP).

¹¹ For a HICAP direct services waiver, the managing AAA of HICAP services must document that all affected AAAs agree.

SECTION 15. REQUEST FOR APPROVAL TO PROVIDE DIRECT SERVICES

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

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

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

Identify Service Category: Community Education

Check applicable funding source:¹⁰

☒ IIIB

☐ IIIC-1

☐ IIIC-2

☐ IIID

☐ IIIE

☐ VIIA

☐ HICAP

Request for Approval Justification:

☐ Necessary to Assure an Adequate Supply of Service OR

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

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

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

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

¹¹ Section 15 does not apply to Title V (SCSEP).

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

Senior Information and Assistance staff attend a number of Community Events and are the best positioned provider to inform older adults about the network of programs that are available in the County

² Section 15 does not apply to Title V (SCSEP).

³ For a HICAP direct services waiver, the managing AAA of HICAP services must document that all affected AAAs agree.

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

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

Total Number of Board Members: 5

Name and Title of Officers:	Office Term Expires:
Curt Hagman, Chairman, Fourth District Supervisor	2022
Janice Rutherford, Vice-Chairman, Second District Supervisor	2022

Names and Titles of All Members:	Board Term Expires:
Robert A. Lovingood, First District Supervisor	2020
Dawn Rowe, Third District Supervisor	2020
Josie Gonzales, Fifth District Supervisor	2020

SECTION 17. ADVISORY COUNCIL**ADVISORY COUNCIL MEMBERSHIP
2020-2024 Four-Year Planning Cycle**

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

Total Council Membership (include vacancies) 21

Number of Council Members over age 60 15

	<u>% of PSA's 60+Population</u>	<u>% on Advisory Council</u>
Race/Ethnic Composition		
White	<u>71.3</u>	<u>66.7</u>
Hispanic	<u>30.2</u>	<u>6.7</u>
Black	<u>7.5</u>	<u>20.0</u>
Asian/Pacific Islander	<u>8.5</u>	<u>0.0</u>
Native American/Alaskan Native	<u>0.1</u>	<u>6.7</u>
Other	<u>9.5</u>	<u>6.7</u>

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

Linda J. Titus, Chair	12/04/2023
David Wilder, Vice-Chair, Access Committee Chair, East Valley Regional Council on Aging, and California Senior Senator	RCA
Suzanne Yoakum, Secretary, and California Senior Assembly Member	12/5/2022

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

Gwen Alber, West Valley Regional Council on Aging	RCA
Maricela S. Ferguson, Chair Legislative Committee	12/07/2020
Heather Lopez, Victor Valley Regional Council on Aging	RCA
Marion Black	12/7/2020
Jane Jarlsberg, Intergenerational Committee Chair, Morongo Basin Regional Council on Aging, and California Senior Assembly Member	RCA
Charles Marlett, North Desert Regional Council on Aging	RCA
Lisbeth Koenig, Nutrition Committee Chair	12/6/2021
Penny Shubnell, Mountain Regional Council on Aging, Healthy Aging Committee Chair	RCA

Joanne L. Iavello	12/4/2023
James S. Welte	12/4/2023
Larry Grable	12/5/2022
Denise K. Benton	12/4/2023
Daniel Burke	1/5/2021
Terry Conaway, Colorado River Regional Council on Aging	RCA

Member(s) represent each of the “Other Representation” categories listed below.

Yes No

- ☒ ☐ Low Income
- ☒ ☐ Representative Disabled
- ☒ ☐ Representative
- ☒ ☐ Supportive Services
- ☒ ☐ Provider Representative
- ☒ ☐ Health Care Provider
- ☒ ☐ Representative
- ☒ ☐ Family Caregiver
- ☒ ☐ Representative Local
- ☒ ☐ Elected Officials
- ☒ ☐ Individuals with
Leadership Experience
in Private and Voluntary
Sectors

Explain any "No" answer(s): N/A

Individual SAC member information is on file with the Department of Aging and Adult Services.

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

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

PROFESSIONAL MEMBERS: At the recommendation of the Director of the Department of Aging, the Board of Supervisors may appoint up to 2 commissioners having relevant Professional experience in fields

including but not limited to: gerontology, social work, education, banking or financial management. The term of office of the Professional Members shall be for four years.

REPRESENTATIVE MEMBERS: The chairs of the Regional Council on Aging (RCA) or a designated member shall serve on the commission. In the event 1 or more of the chairs of the RCA is already a member of the Commission, he/she may continue to serve in the position of his/her choice. The RCA shall designate a representative in the event the chair elects to serve on the Commission in another position. The term of the office of the chair elects to serve on the Commission in another position. The term of office of the representative members shall be coterminous with the term of office for the chairs of the RCA.

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

SECTION 18. LEGAL ASSISTANCE

2020-2024 Four-Year Area Planning Cycle

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

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

PSA 20's Legal Services Mission Statement:

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

Inland Counties Legal Services (ICLS) Mission Statement:

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

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

A minimum of 10% of IIIB funding is allocated to meet the need for Legal Services in San Bernardino County. This percentage was determined using data from the needs assessment as well as a five-year analysis of service and funding trends.

3. Specific to Legal Services, has there been a change in your local needs in the past four years? If so, please identify the change (include whether the change affected the level of funding and the difference in funding levels in the past four years).

Yes, there has been a change in that more seniors are dealing with landlord/tenant issues, fraud, debt collection, estate planning, bankruptcies, and health care access.

2015/16	\$191,000
2016/17	\$191,000
2017/18	\$210,000
2018/19	\$303,533
2019/20	\$266,100

4. Specific to Legal Services, does the AAA's contract/agreement with the Legal Services Provider(s) (LSPs) specify that the LSPs are expected to use the California Statewide Guidelines in the provision of OAA legal services?

Yes.

5. Does the AAA collaborate with the Legal Services Provider(s) to jointly establish specific priorities issues for legal services? If so, what are the top four (4) priority legal issues in your PSA?

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

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

6. Specific to Legal Services, does the AAA collaborate with the Legal Services Provider(s) to jointly identify the target population? If so, what is the targeted senior population in your PSA AND what mechanism is used for reaching the target population?

No, but the Legal Services provider is aware of the targeted population. They respond to all requests for assistance regardless of the individual. Seniors who have low income, live in rural areas, are alone or at risk for victimization are priorities. Regular presence at senior citizen centers and outreach is scheduled; and client intake is done on appointment. Outreach includes urban, rural and desert areas as well as telephone intake for advising on routine legal matters.

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

See 6.

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

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

¹² For Information related to Legal Services, contact Chisorom Okwuosa at 916 419-7500 or chisorom.okwuosa@aging.ca.gov

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

Yes; 1-888-245-4257.

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

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

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

Fiscal Year	Name of Provider	Geographic Region covered
2020-2021	Inland Counties Legal Services	San Bernardino County
2021-2022	<i>Leave Blank until 2021</i>	<i>Leave Blank until 2021</i>
2022-2023	<i>Leave Blank until 2022</i>	<i>Leave Blank until 2022</i>
2023-2024	<i>Leave Blank until 2023</i>	<i>Leave Blank until 2023</i>

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

Older adults are interviewed concerning their legal problems during outreach activities at senior citizen centers throughout the County. Those activities have been limited due to the current pandemic. Additionally, initial contact can be from the seniors reaching ICLS by telephone at 1-888-245-4257 or through their website at <https://www.inlandlegal.org/>. ICLS recently formed practice groups based on areas of expertise to better serve clients. ICLS has an intake unit that directly receives incoming phone calls. The intake specialist assists with the issue and forwards the call to the appropriate practice group based on the issue. There is no change to the types of cases, as outlined in the contract, that ICLS accepts.

ICLS has three branch offices located in the County of San Bernardino.

- San Bernardino
- Ontario
- Victorville

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

13. Identify the major types of legal issues that are handled by the Title IIIB legal provider(s) in your PSA. Discuss (please include new trends of legal problems in your area):

Identified in number 5 above.

- 14.** In the past four years, has there been a change in the types of legal issues handled by the Title III B legal provider(s) in your PSA?

Identified in number 5 above.

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

Barriers include a lack of public transportation in the more rural and remote parts of the County, geographic size of the County, and limited resources for legal assistance.

Strategies: ICLS is accessible toll free by telephone and performs regularly scheduled outreach at senior citizen centers throughout the County.

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

Department of Aging and Adult Services, Ombudsman, Adult Protective Services, California Advocates for Nursing Home Reform, and 2-1-1.

SECTION 19. MULTIPURPOSE SENIOR CENTER ACQUISITION OR CONSTRUCTION COMPLIANCE REVIEW³

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		Compliance Verification State Use Only
				Begin	End	
Name: Address:						
Name: Address:						
Name: Address:						
Name: Address:						

³ 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 20. FAMILY CAREGIVER SUPPORT PROGRAM

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

2020-2024 Four-Year Planning Cycle

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

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

Family Caregiver Services

Category	2020-2021	2021-2022	2022-2023	2023-2024
Family Caregiver Information Services	☒ Yes ☐ No ☒ Direct ☒ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract
Family Caregiver Access Assistance	☒ Yes ☐ No ☒ Direct ☒ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract
Family Caregiver Support Services	☒ Yes ☐ No ☐ Direct ☒ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract
Family Caregiver Respite Care	☒ Yes ☐ No ☐ Direct ☒ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract
Family Caregiver Supplemental Services	☒ Yes ☐ No ☐ Direct ☒ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract

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

Grandparent Services

Category	2020-2021	2021-2022	2022-2023	2023-2024
Grandparent Information Services	☒ Yes ☐ No ☒ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract
Grandparent Access Assistance	☒ Yes ☐ No ☒ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract
Grandparent Support Services	☐ Yes ☒ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract
Grandparent Respite Care	☐ Yes ☒ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract
Grandparent Supplemental Services	☐ Yes ☒ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract	☐ Yes ☐ No ☐ Direct ☐ Contract

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

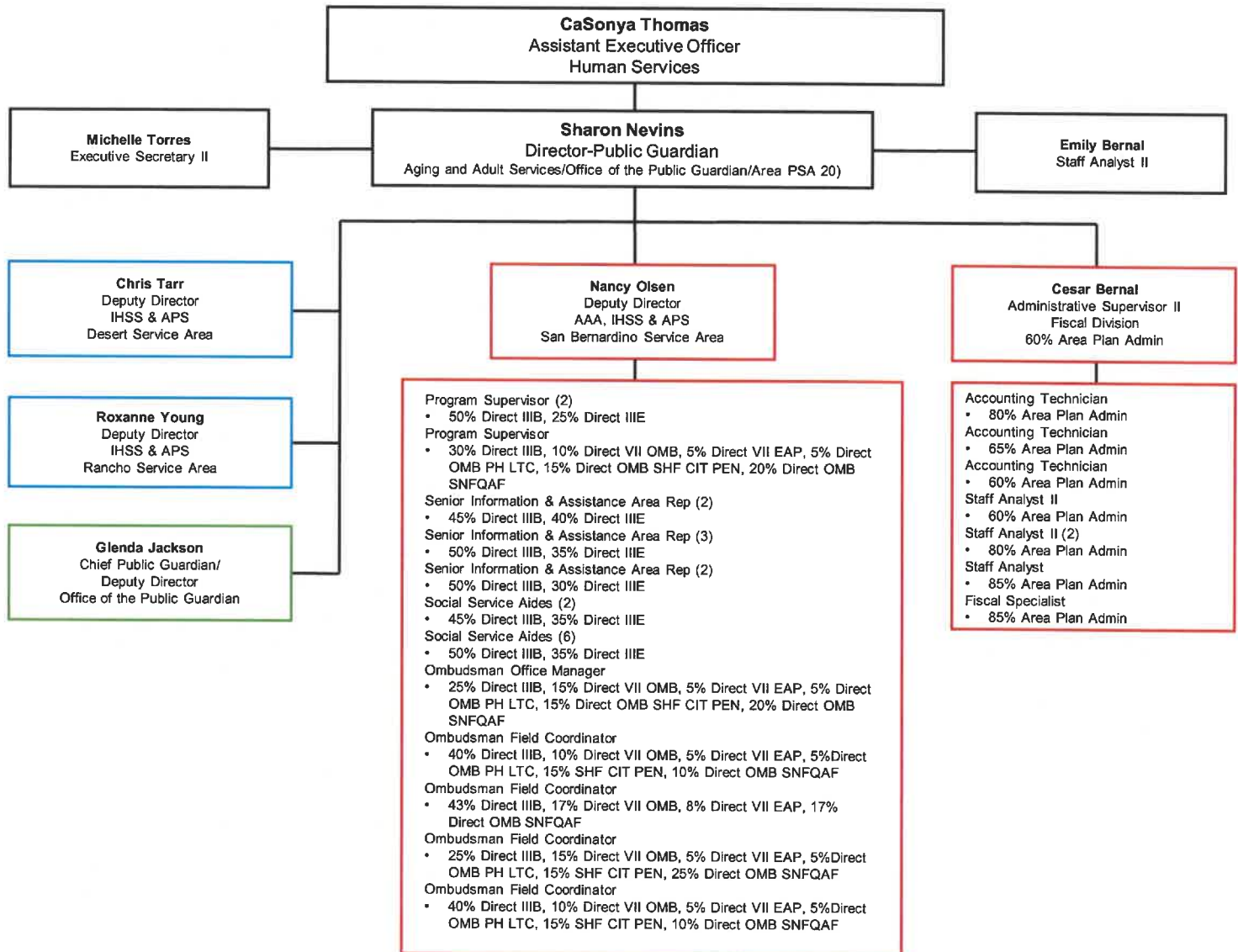
Justification: For each service category checked “no”, explain how it is being addressed within the PSA. The justification must include the following:

- Provider name and address of agency
- Description of the service
- Where the service is provided (entire PSA, certain counties, etc.)
- Information that influenced the decision not to provide the service (research, needs assessment, survey of senior population in PSA, etc.)
- How the AAA ensures the service continues to be provided in the PSA without the use of Title III E funds

Justification:

San Bernardino County's Kinship Support Services Program is a collaborative between the Department of Children and Family Services (CFS) and not-for-profit organizations serving the central, west end and High Desert regions of the County. The Kinship Support Services Program is funded by a combination of State, Federal and foundation grants. The Kinship Support Services Program helps strengthen families of individuals who are raising children of their extended family. The program provides a variety of support services to kinship families, ranging from great-grandmothers raising their great-grandchildren, to older siblings raising their brothers and sisters. Services are designed to combat the isolation, stress, and needs kinship families encounter in their day-to-day lives, and include support groups, parenting classes, informational workshops, caregiver respite, children's activities, and family recreation. Additional services are developed in response to caregiver and kin-child needs. In order to prevent duplication, PSA 20 determined that III E GP contracted services would not be provided beginning in fiscal year 14/15. No gap in services has been reported in the two years that III E GP contracted services have not been funded.

SECTION 21. ORGANIZATION CHART



SECTION 22. ASSURANCES

Pursuant to the Older Americans Act Reauthorization Act of 2016, (OAA), the Area Agency on Aging assures that it will:

A. Assurances

1. OAA 306(a)(2)

Provide an adequate proportion, as required under Older Americans Act Reauthorization Act of 2016 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 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 who are victims of 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;

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

(I) provide assurances that the area agency on aging will -

- (aa) set specific objectives, consistent with State policy, for providing services to older individuals with greatest economic need, older individuals with greatest social need, and older individuals at risk for institutional placement;
- (bb) include specific objectives for providing services to low-income minority older individuals, older individuals with limited English proficiency, and older individuals residing in rural areas; and;

(II) include proposed methods to achieve the objectives described in (aa) and (bb) of subclause (I);

3. OAA 306(a)(4)(A)(ii)

Include in each agreement made with a provider of any service under this title, a requirement that such provider will—

- (I) specify how the provider intends to satisfy the service needs of low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in the area served by the provider;
- (II) to the maximum extent feasible, provide services to low-income minority individuals, older individuals with limited English proficiency, and older individuals residing in rural areas in accordance with their need for such services; 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;

4. OAA 306(a)(4)(A)(iii)

With respect to the fiscal year preceding the fiscal year for which such plan is prepared—

- (I) identify the number of low-income minority older individuals in the planning and service area;
- (II) describe the methods used to satisfy the service needs of such minority older individuals; and
- (III) provide information on the extent to which the area agency on aging met the objectives described in assurance number 2.

5. OAA 306(a)(4)(B)

Use outreach efforts that —

- (i) identify individuals eligible for assistance under this Act, with special emphasis on—

- (I) older individuals residing in rural areas;
- (II) older individuals with greatest economic need (with particular attention to low-income minority individuals and older individuals residing in rural areas);
- (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; 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;

6. OAA 306(a)(4)(C)

Contain an assurance that the Area Agency on Aging will ensure that each activity undertaken by the agency, including planning, advocacy, and systems development, will include a focus on the needs of low-income minority older individuals and older individuals residing in rural areas;

7. OAA 306(a)(5)

Provide assurances that the Area Agency on Aging will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention to individuals with severe disabilities, and individuals at risk for institutional placement with agencies that develop or provide services for individuals with disabilities;

8. OAA 306(a)(9)

Provide assurances that the Area Agency on Aging will carry out the State Long-Term Care Ombudsman program under 307(a)(9), will expend not less than the total amount

of funds appropriated under this Act and expended by the agency in fiscal year 2000 in carrying out such a program under this title;

9. OAA 306(a)(11)

Provide information and assurances concerning services to older individuals who are Native Americans (referred to in this paragraph as “older Native Americans”), including—

(A) information concerning whether there is a significant population of older Native Americans in the planning and service area and if so, 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.

10. OAA 306(a)(13)(A-E)

(A) maintain the integrity and public purpose of services provided, and service providers, under this title in all contractual and commercial relationships;

(B) disclose to the Assistant Secretary and the State agency—

(i) the identity of each nongovernmental entity with which such agency has a contract or commercial relationship relating to providing any service to older individuals; 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;

11. 306(a)(14)

Provide assurances that preference in receiving services under this Title shall not be given to particular older individuals as a result of a contract or commercial relationship that is not carried out to implement this title;

12. 306(a)(15)

Provide assurances that funds received under this title will be used—

(A) to provide benefits and services to older individuals, giving priority to older individuals identified in Older Americans Act Reauthorization Act

of 2016, Section 306(a)(4)(A)(i); and
(B) in compliance with the assurances specified in Older Americans Act Reauthorization act of 2016, Section 306(a)(13) and the limitations specified in Older Americans Act Reauthorization Act of 2016, Section 212;

13: OAA 305(c)(5)

In the case of a State specified in subsection (b)(5), the State agency; and shall provide assurance, determined adequate by the State agency, that the area agency on aging will have the ability to develop an area plan and to carry out, directly or through contractual or other arrangements, a program in accordance with the plan within the planning and service area.

14. OAA 307(a)(7)(B)

(i) no individual (appointed or otherwise) involved in the designation of the State agency or an area agency on aging, or in the designation of the head of any subdivision of the State agency or of an area agency on aging, is subject to a conflict of interest prohibited under this Act;

(ii) no officer, employee, or other representative of the State agency or an area agency on aging is subject to a conflict of interest prohibited under this Act; and

(iii) mechanisms are in place to identify and remove conflicts of interest prohibited under this Act.

15. OAA 307(a)(11)(A)

(i) enter into contracts with providers of legal assistance, which can demonstrate the experience or capacity to deliver legal assistance;

(ii) include in any such contract provisions to assure that any recipient of funds under division (i) will be subject to specific restrictions and regulations promulgated under the Legal Services Corporation Act (other than restrictions and regulations governing eligibility for legal assistance under such Act and governing membership of local governing boards) as determined appropriate by the Assistant Secretary; and

(iii) attempt to involve the private bar in legal assistance activities authorized under this title, including groups within the private bar furnishing services to older individuals on a pro bono and reduced fee basis.

16. OAA 307(a)(11)(B)

That no legal assistance will be furnished unless the grantee administers a program designed to provide legal assistance to older individuals with social or economic need and has agreed, if the grantee is not a Legal Services Corporation project grantee, to coordinate its services with existing Legal Services Corporation projects in the planning and service area in order to concentrate the use of funds provided under this title on individuals with the greatest such need; and the area agency on aging makes a finding, after assessment, pursuant to standards for service promulgated by the Assistant Secretary, that any grantee selected is the entity best able to provide the particular services.

17. OAA 307(a)(11)(D)

To the extent practicable, that legal assistance furnished under the plan will be in addition to any legal assistance for older individuals being furnished with funds from sources other than this Act and that reasonable efforts will be made to maintain existing levels of legal assistance for older individuals; and

18. OAA 307(a)(11)(E)

Give priority to legal assistance related to income, health care, long-term care, nutrition, housing, utilities, protective services, defense of guardianship, abuse, neglect, and age discrimination.

19. OAA 307(a)(12)(A)

In carrying out such services conduct a program consistent with relevant State law and coordinated with existing State adult protective service activities for -

- (i) public education to identify and prevent abuse of older individuals;
- (ii) receipt of reports of abuse of older individuals;
- (iii) active participation of older individuals participating in programs under this Act through outreach, conferences, and referral of such individuals to other social service agencies or sources of assistance where appropriate and consented to by the parties to be referred; and
- (iv) referral of complaints to law enforcement or public protective service agencies where appropriate.

20. OAA 307(a)(15)

If a substantial number of the older individuals residing in any planning and service area in the State are of limited English-speaking ability, then the State will require the area agency on aging for each such planning and service area -

(A) To utilize in the delivery of outreach services under Section 306(a)(2)(A), the services of workers who are fluent in the language spoken by a predominant number of such older individuals who are of limited English-speaking ability.

(B) To designate an individual employed by the area agency on aging, or available to such area agency on aging on a full-time basis, whose responsibilities will include:

- (i) taking such action as may be appropriate to assure that counseling assistance is made available to such older individuals who are of limited English-speaking ability in order to assist such older individuals in participating in programs and receiving assistance under this Act; and
- (ii) providing guidance to individuals engaged in the delivery of supportive services under the area plan involved to enable such individuals to be aware of cultural sensitivities and to take into account effective linguistic and cultural differences.

21. OAA 307(a)(18)

Conduct efforts to facilitate the coordination of community-based, long-term care services, pursuant to Section 306(a)(7), for older individuals who -

- (A) reside at home and are at risk of institutionalization because of limitations on their ability to function independently;
- (B) are patients in hospitals and are at risk of prolonged institutionalization; or
- (C) are patients in long-term care facilities, but who can return to their homes if community-based services are provided to them.

22. OAA 307(a)(26)

That funds received under this title will not be used to pay any part of a cost (including an administrative cost) incurred by the State agency, or an area agency on aging, to carry out a contract or commercial relationship that is not carried out to implement this title.

23. OAA 307(a)(27)

Provide, to the extent feasible, for the furnishing of services under this Act, consistent with self-directed care.

B. Code of Federal Regulations (CFR), Title 45 Requirements:**24. CFR [1321.53(a)(b)]**

(a) The Older Americans Act intends that the area agency on aging shall be the leader relative to all aging issues on behalf of all older persons in the planning and service area. This means that the area agency shall proactively carry out, under the leadership and direction of the State agency, a wide range of functions related to advocacy, planning, coordination, interagency linkages, information sharing, brokering, monitoring and evaluation, designed to lead to the development or enhancement of comprehensive and coordinated community based systems in, or serving, each community in the Planning and Service Area. These systems shall be designed to assist older persons in leading independent, meaningful and dignified lives in their own homes and communities as long as possible.

(b) A comprehensive and coordinated community-based system described in paragraph (a) of this section shall:

(1) Have a visible focal point of contact where anyone can go or call for help, information or referral on any aging issue;

(2) Provide a range of options;

(3) Assure that these options are readily accessible to all older persons: The independent, semi-dependent and totally dependent, no matter what their income;

(4) Include a commitment of public, private, voluntary and personal resources committed to supporting the system;

(5) Involve collaborative decision-making among public, private, voluntary, religious and fraternal organizations and older people in the community;

(6) Offer special help or targeted resources for the most vulnerable older persons, those in danger of losing their independence;

(7) Provide effective referral from agency to agency to assure that information or assistance is received, no matter how or where contact is made in the community;

(8) Evidence sufficient flexibility to respond with appropriate individualized assistance, especially for the vulnerable older person;

(9) Have a unique character which is tailored to the specific nature of the community;

(10) Be directed by leaders in the community who have the respect, capacity and authority necessary to convene all interested individuals, assess needs, design solutions, track overall success, stimulate change and plan community responses for the present and for the future.

25. CFR [1321.53(c)]

The resources made available to the area agency on aging under the Older Americans Act are to be used to finance those activities necessary to achieve elements of a community based system set forth in paragraph (b) of this section.

26. CFR [1321.53(c)]

Work with elected community officials in the planning and service area to designate one or more focal points on aging in each community, as appropriate.

27. CFR [1321.53(c)]

Assure access from designated focal points to services financed under the Older Americans Act.

CFR [1321.53(c)]

Work with, or work to assure that community leadership works with, other applicable agencies and institutions in the community to achieve maximum collocation at, coordination with or access to other services and opportunities for the elderly from the designated community focal points.

28. CFR [1321.61(b)(4)]

Consult with and support the State's long-term care ombudsman program.

29. CFR [1321.61(d)]

No requirement in this section shall be deemed to supersede a prohibition contained in the Federal appropriation on the use of Federal funds to lobby the Congress; or the lobbying provision applicable to private nonprofit agencies and organizations contained in OMB Circular A-122.

30. CFR [1321.69(a)]

Persons age 60 and older who are frail, homebound by reason of illness or incapacitating disability, or otherwise isolated, shall be given priority in the delivery of services under this part.