

Orange County Office on Aging PSA 22

2021-2022 Area Plan Update

(Rev 06/2021)



AREA PLAN UPDATE (APU) CHECKLIST

PSA 22

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)	<input checked="" type="checkbox"/>	
n/a	B) APU- (submit entire APU electronically only)	<input checked="" type="checkbox"/>	
2, 3, or 4	C) Estimate- of the number of lower income minority older individuals in the PSA for the coming year	<input checked="" type="checkbox"/>	
7	D) Public Hearings- that will be conducted	<input checked="" type="checkbox"/>	
n/a	E) Annual Budget	<input type="checkbox"/>	
10	F) Service Unit Plan (SUP) Objectives and LTC Ombudsman Program Outcomes	<input checked="" type="checkbox"/>	
18	G) Legal Assistance	<input checked="" type="checkbox"/>	
	➤ <i>Update/Submit the following only if there has been a CHANGE or the section was not included in the 2020-2024</i>	Mark Changed/Not Changed (C or N/C)	
5	Minimum Percentage/Adequate Proportion	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	Needs Assessment	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	AP Narrative Objectives:	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	• System-Building and Administration	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	• Title IIIB-Funded Programs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	• Title IIIB-Transportation	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	• Title IIIB-Funded Program Development/Coordination (PD or C)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	• Title IIIC-1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	• Title IIIC-2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	• Title IIID	<input type="checkbox"/>	<input checked="" type="checkbox"/>
20	• Title IIIE-Family Caregiver Support Program	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	• HICAP Program	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12	Disaster Preparedness	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14	Notice of Intent-to Provide Direct Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15	Request for Approval-to Provide Direct Services	<input type="checkbox"/>	<input checked="" type="checkbox"/>
16	Governing Board	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17	Advisory Council	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21	Organizational Chart(s)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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: Orange County Office on Aging

PSA 22

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. (see below)
(Type Name)

Signature: Governing Board Chair ¹

Date

2. Elaine Gennawey

Signature: Advisory Council Chair

Date

3. Ericka Danczak
(Type Name)

Signature: Area Agency Director

Date

** In a Minute Order dated April 14, 2020, the Orange County Board of Supervisors, as the governing body of the PSA 22 Area Agency on Aging, approved the 2020-24 Area Plan and authorized the Director of the Office on Aging to execute and submit plan updates and amendments for the 2020-24 planning period.

¹ Original signatures or official signature stamps are required.

Estimate of the number of lower income minority older individuals (60+) in the PSA for the coming year.

The older adult population (60+) in Orange County has steadily increased from 496,404 in 2010 to an estimated 674,878 older adults in 2019, according to the U.S. Census Bureau. An estimate number of lower income (below 100% of the Federal Poverty Guideline) minorities aged 60 and above in Orange County has been estimated for the coming year. The chart below shows an estimate number of lower income (below 100% of the Federal Poverty Guideline) minorities aged 60 and above in Orange County has been estimated for the coming year.

PROJECTED COUNTS	2016	2017	2018	2019	2020	2021
Lower Income 60+	54,777 ¹	53,162 ¹	63,824 ¹	55,422 ¹	56,150	56,888
Black or African American	785	1,254	959	1,098	1,188	1,427
American Indian and Alaska Native	157	367	90	53	49	51
Asian	7,505	9,284	9,186	6,359	5,635	5,549
Native Hawaiian and Other Pacific Islander	65	28	17	-	-	-
Hispanic	17,407	19,665	17,217	13,288	11,310	10,697
White	9,527	10,943	9,897	7,136	6,043	5,686

¹ Census: American Community Survey 1-Year Estimates

SECTION 7. PUBLIC HEARINGS

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At least one public hearing must be held each year of the four-year planning cycle.
CCR Title 22, Article 3, Section 7302(a)(10) and Section 7308, OAA 2006 306(a)

Fiscal Year	Date	Location	Number of Attendees	Presented in languages other than English?² Yes or No	Was hearing held at a Long-Term Care Facility?³ Yes or No
2020-21	4/14/2020	Office on Aging in Santa Ana, CA	27	No	No
2021-22	4/9/2021	Via Zoom	45	No	No
2022-23					
2023-24					

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.

The needs of institutionalized, homebound and/or disabled older individuals were identified and addressed by key informant service providers as part of the needs assessment and planning process. A draft of the area plan was available on the Office on Aging website and representatives from organizations providing services to these individuals were in attendance at the public hearing. The public hearing was also conducted via Zoom which could allow for greater accessibility to the homebound and disabled populations.

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

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

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

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

N/A

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.

No comments were received on the minimum percentages.

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

One comment was received that spoke to the elimination of one specific service activity (translation) starting FY 20-21. All other comments were general observations related to COVID-19 operations and increasing older adult populations and level funding.

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

None.

SECTION 10 - SERVICE UNIT PLAN (SUP) OBJECTIVES

PSA 22

**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	3,500	2	
2021-2022	3,500	2	
2022-2023	3,500	2	
2023-2024	3,500	2	

Homemaker (In-Home)

Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	6,000	2	
2021-2022	6,000	2	
2022-2023	6,000	2	
2023-2024	6,000	2	

Chore (In-Home)**Unit of Service = 1 hour**

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

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

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

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	45,500	2	
2021-2022	45,500	2	
2022-2023	45,500	2	
2023-2024	45,500	2	

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	12,000	2	
2021-2022	12,000	2	
2022-2023	12,000	2	
2023-2024	12,000	2	

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

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

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	33,000	2	
2021-2022	33,000	2	
2022-2023	33,000	2	
2023-2024	33,000	2	

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	8,300	2	
2021-2022	8,300	2	
2022-2023	8,300	2	
2023-2024	8,300	2	

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	14,000	1,2	
2021-2022	14,000	1,2	
2022-2023	14,000	1,2	
2023-2024	14,000	1,2	

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	20,000	1	
2021-2022	20,000	1	
2022-2023	20,000	1	
2023-2024	20,000	1	

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	5,000	1	1.1
2021-2022	5,000	1	1.1
2022-2023	5,000	1	1.1
2023-2024	5,000	1	1.1

1. 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.)

2. 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.

If applicable, all “Other” services must be listed separately. Duplicate the table below as needed.

Service Category: Senior Center Activities **Unit of Service = 1 Hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	10,000	2	
2021-2022	10,000	2	
2022-2023	10,000	2	
2023-2024	10,000	2	

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	6,600	2	
2021-2022	6,600	2	
2022-2023	6,600	2	
2023-2024	6,600	2	

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	40	1	1.3
2021-2022	40	1	1.3
2022-2023	40	1	1.3
2023-2024	40	1	1.3

Service Category: Disaster Preparedness Materials**Unit of Service = 1 Product**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	1,000	1	1.2
2021-2022	1,000	1	1.2
2022-2023	1,000	1	1.2
2023-2024	1,000	1	1.2

**Service Category: Residential Repairs/Modifications
Modification****Unit of Service = 1**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	15	2	
2021-2022	15	2	
2022-2023	15	2	
2023-2024	15	2	

Service Category: Public Information**Unit of Service = 1 Activity**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	24	1	1.4
2021-2022	24	1	1.4

2022-2023	24	1	1.4
2023-2024	24	1	1.4

3. Title IIID/ Disease Prevention and Health Promotion

Instructions for Title IIID Disease Prevention and Health Promotion: Enter the name of each proposed program that meets the criteria for evidence-based programs described in PM 15-10, proposed units of service, and the Program Goal and Objective number(s).

1. Chronic Disease Self-Management Program (CDSMP)
2. Tomando Control de su Salud
3. Diabetes Self-Management Program (DSMP)
4. Programa de Manejo Personal de la Diabetes
5. A Matter of Balance (AMOB)

Each of these programs has been deemed evidence-based by the Administration on Aging.

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

Unit of Service = 1 Contact

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2020-2021	2,000	2	2.8
2021-2022	2,000	2	2.8
2022-2023	2,000	2	2.8
2023-2024	2,000	2	2.8

**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 471 + number of partially resolved complaints 112 divided by the total number of complaints received 803 = Baseline Resolution Rate 72.6 % FY 2020-2021 Target Resolution Rate 70 %

2. FY 2019-2020 Baseline Resolution Rate:

Number of complaints partially or fully resolved 626 divided by the total number of complaints received 794 = Baseline Resolution Rate 79 %
FY 2021-2022 Target Resolution Rate 70 %

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: 2

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

1. FY 2018-2019 Baseline: Number of Resident Council meetings attended 932 ____
 FY 2020-2021 Target: 950

2. FY 2019-2020 Baseline: Number of Resident Council meetings attended 500
 FY 2021-2022 Target: 921

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: 2

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

1. FY 2018-2019 Baseline: Number of Family Council meetings attended 21 ____
 FY 2020-2021 Target: 25

2. FY 2019-2020 Baseline: Number of Family Council meetings attended 14
 FY 2021-2022 Target: 23

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: 2

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 2,062 ____
 FY 2020-2021 Target: 2,000

2. FY 2019-2020 Baseline: Number of Instances <u>10241</u> FY 2021-2022 Target: <u>2000</u>
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: <u>2</u>

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 5,480 _____ FY 2020-2021 Target: <u>5,000</u>
2. FY 2019-2020 Baseline: Number of Instances <u>4994</u> FY 2021-2022 Target: <u>5,000</u>
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: <u>2</u>

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 21 _____ FY 2020-2021 Target: <u>20</u>
2. FY 2019-2020 Baseline: Number of Sessions <u>13</u> FY 2021-2022 Target: <u>20</u>
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: <u>2</u>

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

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

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

Enter information in the relevant box below.

System Advocacy Efforts

FY 2020-2021

FY 2020-2021 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)

The Program will continue its focus on closely collaborating with the Elder Abuse Prevention Program's Financial Abuse Specialist Team (FAST) to help increase awareness and prevention of elder financial abuse within LTC facilities. The ombudsman representatives will use the information learned from FAST meetings to educate the families and caregivers of LTC residents on the latest trends in elder adult scams and recognize its warning signs.

The Program will also continue participating in the Elder Abuse Forensic Center of Orange County, which is a collaboration of legal, medical, social service and law enforcement agencies. The Forensic Center strives to better identify, understand, and treat victims of elder abuse, with an eye towards prevention. The Ombudsman Program participates in the EAFC meetings on a weekly basis.

FY 2021-2022

FY 2021-2022 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)

The Program will continue participating in the Residential Care for the Elderly (RCFE) Task Force, which is comprised of the California Community Care Licensing Division - Orange County Office, the Orange County Health Care Agency, the OCHCA MHOAC, Orange County Sheriff's Department, EMS Division, Orange County Social Services Agency and the Council on Aging, Southern California, LTC Ombudsman Program. This Task Force was assembled to support RCFEs through the COVID-19 pandemic and beyond.

Objectives of the Task Force include:

- Identifying roles and responsibilities of agencies involved in COVID-19 outbreaks at an RCFE and other assisted living facilities, including memory care facilities, within Orange County;
- Coordinating solutions and identifying resources inside and outside of the task force;
- Identifying emergency response plans due to staffing shortages within facilities;
- Identifying proactive approaches for RCFE facilities through education.

FY 2022-2023

FY 2022-2023 Systems Advocacy Effort(s): (Provide one or more new systems advocacy efforts)

FY 2023-2024

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.

<p>1. FY 2018-2019 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint <u>71</u> FY 2020-2021 Target: <u>72</u></p>
<p>1. FY 2019-2020 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint <u>0</u> FY 2021-2022 Target: <u>72</u></p>
<p>2. FY 2020-2021 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint _____ FY 2022-2023 Target: _____</p>
<p>3. FY 2021-2022 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint _____ FY 2023-2024 Target: _____</p>
<p>Program Goals and Objective Numbers: <u>2</u></p>

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>599</u> FY 2020-2021 Target: 873
2. FY 2019-2020 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint <u>0</u> FY 2021-2022 Target: 818
3. FY 2020-2021 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint _____ FY 2022-2023 Target:
4. FY 2021-2022 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint _____ FY 2023-2024 Target:
Program Goals and Objective Numbers: <u>2</u>

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: 11.07_FTEs FY 2020-2021 Target: <u>15.53</u> _FTEs
2. FY 2019-2020 Baseline: <u>13.11</u> _FTEs FY 2021-2022 Target: <u>14.13</u> _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: <u>2</u>

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

1. FY 2018-2019 Baseline: Number of certified LTC Ombudsman volunteers 61 _____ FY 2020-2021 Projected Number of certified LTC Ombudsman volunteers 65

2. FY 2019-2020 Baseline: Number of certified LTC Ombudsman volunteers <u>39</u> FY 2021-2022 Projected Number of certified LTC Ombudsman volunteers <u>59</u>
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: <u>2</u>

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:

A. 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

The Program will require that the Ombudsmen participate in NORS Consistency Training to ensure there is accuracy in case reporting and entry.

The Program Director and Field Services Managers will review data on a weekly basis to ensure data integrity.

The Program will continue to require Ombudsmen to report their Activities on a weekly basis to ensure data is entered in a timely manner.

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: Council on Aging – Southern California

Fiscal Year	Total # of Public Education Sessions
2020-2021	25
2021-2022	25
2022-2023	25
2023-2024	25

Fiscal Year	Total # of Training Sessions for Professionals
2020-2021	18
2021-2022	18
2022-2023	18
2023-2024	18

Fiscal Year	Total # of Training Sessions for Caregivers served by Title III E
2020-2021	6
2021-2022	6
2022-2023	6
2023-2024	6

Fiscal Year	Total # of Hours Spent Developing a Coordinated System
2020-2021	300
2021-2022	300
2022-2023	300
2023-2024	300

Fiscal Year	Total # of Copies of Educational Materials to be Distributed	Description of Educational Materials
2020-2021	6,000	FAST brochure and bookmarks
		Healthcare Fraud brochure from SMP
		Materials relevant to specific subject matter
2021-2022	6,000	FAST brochure and bookmarks
		Healthcare Fraud brochure from SMP
		Materials relevant to specific subject matter
2022-2023	6,000	FAST brochure and bookmarks
		Healthcare Fraud brochure from SMP
		Materials relevant to specific subject matter
2023-2024	6,000	FAST brochure and bookmarks
		Healthcare Fraud brochure from SMP
		Materials relevant to specific subject matter

Fiscal Year	Total Number of Individuals Served
2020-2021	3,500
2021-2022	3,500
2022-2023	3,500
2023-2024	3,500

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

Family Caregiver Services Caring for Elderly			
Category	Proposed Units of Service	Required Goal #(s)	Optional Objective #(s)
Information Services	# of activities and Total est. audience for above	2	
2020-2021	# of activities: 250 Total est. audience for above: 130,000		
2021-2022	# of activities: 250 Total est. audience for above: 130,000		
2022-2023	# of activities: 250 Total est. audience for above: 130,000		
2023-2024	# of activities: 250 Total est. audience for above: 130,000		
Access Assistance	Total contacts	2	
2020-2021	20,000		
2021-2022	20,000		
2022-2023	20,000		
2023-2024	20,000		

Support Services	Total hours	2	
2020-2021	5,500		
2021-2022	5,500		
2022-2023	5,500		
2023-2024	5,500		
Respite Care	Total hours	2	
2020-2021	7,000		
2021-2022	7,000		
2022-2023	7,000		
2023-2024	7,000		
Supplemental Services	Total occurrences	2	
2020-2021	70		
2021-2022	70		
2022-2023	70		
2023-2024	70		

Grandparent Services Caring for Children			
Category	Proposed Units of Service	Required Goal #(s)	Optional Objective #(s)
Information Services	# of activities and Total est. audience for above	N/A	
2020-2021	# of activities: Total est. audience for above:		
2021-2022	# of activities: Total est. audience for above:		
2022-2023	# of activities: Total est. audience for above:		

2023-2024	# of activities: Total est. audience for above:		
Access Assistance	Total contacts	N/A	
2020-2021			
2021-2022			
2022-2023			
2023-2024			
Support Services	Total hours	N/A	
2020-2021			
2021-2022			
2022-2023			
2023-2024			
Respite Care	Total hours	N/A	
2020-2021			
2021-2022			
2022-2023			
2023-2024			
Supplemental Services	Total occurrences	N/A	
2020-2021			
2021-2022			
2022-2023			
2023-2024			

SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM (SCSEP)

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

Enrollment Location/Name (AAA office, One Stop, Agency, etc.): Working Wardrobes
Street Address: 2000 E. McFadden Ave. Suite 100, Santa Ana, CA 92705
Name and title of all SCSEP paid project staff members (Do not list participant or participant staff names): Albert Stone: Program Coordinator Sheri Olson: SCSEP Admin
Number of paid staff: 2 Number of participant staff: 0
How many participants are served at this site? 46

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 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:
 - o PM 2.4a Low-income (LIS)
 - o PM 2.4b Rural
 - o 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/ProgramsProviders/AAA/Planning/>.

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).

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.

Check applicable direct services Check **each applicable Fiscal Year**

Title IIIB	2020-2021	2021-2022	2022-2023	2023-2024
<input checked="" type="checkbox"/> Information and Assistance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Case Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Outreach	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Program Development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Coordination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Long Term Care Ombudsman	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Title IID	2020-2021	2021-2022	2022-2023	2023-2024
<input checked="" type="checkbox"/> Disease Prevention and Health Promotion	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Title IIIE⁸	2020-2021	2021-2022	2022-2023	2023-2024
<input type="checkbox"/> Information Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Access Assistance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Support Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Title VIIA	2020-2021	2021-2022	2022-2023	2023-2024
<input type="checkbox"/> Long Term Care Ombudsman	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Title VII	2020-2021	2021-2022	2022-2023	2023-2024
<input type="checkbox"/> Prevention of Elder Abuse, Neglect, and Exploitation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

The Office on Aging operates a state-of-the-art call center with the capacity to directly connect callers with referral agencies. The Office on Aging toll-free number has been widely marketed in Orange County, and Office on Aging is increasingly recognized by service agencies and the general public as the single point of entry for information on programs and services for older adults, their families

⁸ Refer to PM 11-11 for definitions of Title III E categories.

and caregivers. The Office on Aging will continue to target services to those having the greatest social and economic need, including ethnic minorities, caregivers, frail elderly and/or disabled, and low-income older adults; through cooperative efforts with others in the aging network.

The Office on Aging health educator has developed a well-established network of contacts with a broad spectrum of direct service providers in Orange County, including those addressing the needs of individuals having the greatest social and economic need, caregivers, ethnic minorities, frail elderly and/or disabled. The health educator manages the Chronic Disease Self-Management Program, including Tomando Control de su Salud, Diabetes Self-Management Program, including Programa de Manejo Personal de la Diabetes, and A Matter of Balance. These workshops are offered in a variety of settings such as community centers, senior apartment complexes, and churches. An ongoing goal is to recruit and train bilingual leaders; currently lay leaders and coaches offer these classes in English, Spanish, and Chinese.

SECTION 16 - GOVERNING BOARD

PSA 22

**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:
Andrew Do 1 st District - Chair	2021
Katrina Foley 2 nd District	2023
Don Wagner 3 rd District	2021
Doug Chaffee 4 th District - Vice	2023
Lisa Bartlett 5 th District	2023

Names and Titles of All Members:	Board Term Expires:

**ADVISORY COUNCIL MEMBERSHIP
2020-2024 Four-Year Planning Cycle**

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

Total Council Membership (include vacancies) 40

Number of Council Members over age 60 26

	<u>% of PSA's 60+Population</u>	<u>% on Advisory Council</u>
Race/Ethnic Composition		
White	<u>57.0</u>	<u>61.3</u>
Hispanic	<u>17.9</u>	<u>25.8</u>
Black	<u>1.5</u>	<u>3.2</u>
Asian/Pacific Islander	<u>22.7</u>	<u>0.0</u>
Native American/Alaskan Native	<u>0.5</u>	<u>0.0</u>
Other	<u>0.0</u>	<u>9.7</u>

Name and Title of Officers:

Office Term Expires:

Elaine Gennawey – Chair	12/31/21
Eugene Hernandez - Vice Chair	12/31/21
Elizabeth Busick - Secretary	12/31/21
John Pointer – Past Chair	12/31/21
Cynthia Thacker – Member-At-Large	12/31/21
Dave Tetzlaff – Member-At-Large	12/31/22
Phil Mandeville – Member-At-Large	12/31/22

Name of other members:

Office Term Expires:

Cecilia Aguinaga	12/31/22
Anthony Allevato	12/31/21
Linda Barcelona	12/31/17
Denise Barnes	12/31/21
Laval Brewer	12/31/21
Amelia Castro	12/31/21

Meredith Chillemi	12/31/21
Susan Dobak	12/31/22
Carol Downey	12/31/22
Sherry Geyer	12/31/21
Shari L. Horne	12/31/22
Carolyn Inmon	12/31/22
Larry Kramer	12/31/21
Tish Leon	12/31/21
Jim Levy	12/31/22
Nelida Mendoza	12/31/21
Crystal Miles	12/31/22
Patty Mouton	12/31/20
Phil Orland	12/31/20
Tony Rodella	12/31/21
Jeffrey Rodriguez	Indefinite
Barbara Sloate	12/31/21
Dave Sullivan	12/31/22
Sandy Stang	12/31/21
Evelyn Velez	12/31/22

Indicate which member(s) represent each of the “Other Representation” categories listed below. To protect the privacy of the members of the Advisory Council, this personal information will not be included in this public document, but will be provided to CDA upon request.

- | | Yes | No |
|---|-------------------------------------|--------------------------|
| Low Income Representative | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Disabled Representative | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supportive Services Provider Representative | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Health Care Provider Representative | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Family Caregiver Representative | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Local Elected Officials | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Individuals with Leadership Experience in Private and Voluntary Sectors | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

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

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

The Board of Supervisors appoints ten members, the City Selection Committee appoints ten members, and the council itself appoints the remaining twenty members. All members appointed by the Board of Supervisors and by the City Selection Committee shall serve at the pleasure of the appointing body except that the Board of Supervisors, by majority vote, may reject appointment by any authority. Service beyond a two-year term shall be considered by the appointing authority at the end of each two-year term. A member who has not been reappointed or replaced at the termination date of appointment shall serve as a member until reappointed or replaced unless the appointing authority rules otherwise.

2020-2024 Four-Year Area Planning Cycle

This section must be completed and submitted with the Four-Year Area Plan. Any changes to this Section must be documented on this form and remitted with Area Plan Updates.⁴

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

The Legal Services mission of PSA 22 is to support the Legal Services Provider (LSP) by providing Title IIIB funds to supplement the existing program’s funding level so that Orange County older adults in the greatest social and economic need will be provided access to legal services.

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

A minimum of 12 percent.

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/No, Discuss:

There continues to be a high demand for legal assistance for older adults, most of which present varying degrees of complexity. Increased referrals for elder abuse (including financial elder abuse and consumer scams) and landlord-tenant disputes can be attributed to the prevalence of fraud and surge in housing/rental prices within the PSA. There has also been an increased demand in requests of conservatorships and workshops to discuss other legal matters, such as obtaining power of attorney and creating advanced health care directives. During the Covid19 pandemic, landlord-tenant disputes and questions increased significantly due to loss of income and the ever-changing rules, policies and government actions concerning evictions. Additionally, during the pandemic issues regarding access to government agencies and benefits will continue to be an issue as agencies are still trying to determine how to best provide services to the public.

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/No, Discuss:

Yes. The requirement to use the California Statewide Guidelines in the provision of OAA legal services is included in the provider contract scope of services.

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? Yes?No, Discuss:

Yes. The AAA and LSP collaborated to establish the following legal service priority issues:

- a. Housing (landlord and tenant issues and subsidized housing)
- b. Income Maintenance (including government benefits like Social Security and SSI)
- c. Elder Abuse (including financial elder abuse and consumer scams)
- d. Consumer Issues (probate, debt collection, and bankruptcy)

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? Yes/No, Discussion:

Yes. The AAA and LSP collaborates on identifying a target population by analyzing the data reported and using it to establish priority legal needs. To keep in line with the Older Americans Act requirements, the AAA and LSP seek to target services to seniors, specifically ones who show the greatest economic and social needs. These targeted older adults are reached through the LSP hotline and in-person (by means of a walk-in consultation) at their main location. The LSP also visits multiple senior centers and bilingual community services centers for one-on-one consultations with clients. Visits to homeless shelters and other county sites for legal presentations and clinics are also part of the LSP's monthly schedule. During the Covid19 pandemic and continuing until the local, state and federal government allows for the full reopening of services, the LSP has suspended all in person contacts with clients. The LSP are in constant contact with the multiple senior centers in Orange County, and the senior centers continue to refer clients with legal needs for a telephone consultation. Client contacts are made virtually via telephone, zoom or other virtual platforms.

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

The LSP targets low-income, minority, frail, and disabled older adults aged 60 and over within Orange County. The older adults generally request direct assistance by calling the LSP's hotline, walking in for in-person consultations, attending one of the multiple senior center appointments, or attending local community fairs. The LSP also provides offsite visits to homebound or hospitalized older adults. A higher level of assistance is provided by the LSP in cases primarily affecting older adults with limited resources.

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	1
2022-2023	
2023-2024	

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

Yes. The LSP hotline is open from 9am to 6pm on Mondays through Thursday, and 9am to 5pm on Fridays. Walk-ins are welcome Monday through Fridays from 9am to 5pm.

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

The LSP visits multiple senior and community services centers and homeless shelters monthly throughout the County of Orange to provide one-on-one consultations with clients. The LSP also offers presentations and clinics at various locations on subjects such as creating advanced health care directives and obtaining power of attorney. During the Covid19 pandemic, the LSP provides virtual outreaches to the community. Additionally, the LSP provides informational flyers to the agencies upon request.

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

Fiscal Year	Name of Provider	Geographic Region covered
2020-2021	Community Legal Aid So Cal	Countywide
2021-2022	Community Legal Aid So Cal	Countywide
2022-2023		
2023-2024		

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

Clients typically request direct assistance by calling the LSP’s legal hotline, walking in for in-person consultation at the LSP’s location or visiting one of the multiple senior centers served by the LSP within the county. The LSP also disseminates pertinent legal information on subjects like creating advanced health care directives or help with setting up a will (including applicable forms), on their website. The LSP also offers a variety of legal clinics conducted by attorneys in areas such as Supplemental Security Income (SSI), divorce, family, bankruptcy, landlord-tenant disputes, limited conservatorships, consumer rights, worker rights, and small-claims matters. They also work closely with the Office on Aging’s Information and Assistance call center to coordinate legal referrals for older adults.

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):

The primary legal issues handled by the LSP include, but are not limited to, the following: government benefits, landlord-tenant disputes, elder abuse (including financial abuse and consumer scams), probate, and health and consumer issues. The following areas have also seen an increase in the LSP’s fielded requests: conservatorships for family members and issues with student loan repayments.

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

The continuing increase in cost of living within the PSA have resulted in a rise in the following legal matters for older adults: housing (landlord-tenant disputes), income maintenance, and government benefit issues (such as Social Security and SSI). There was also a remarkable increase in requests for conservatorships and elder abuse cases (including financial abuse and consumer scams).

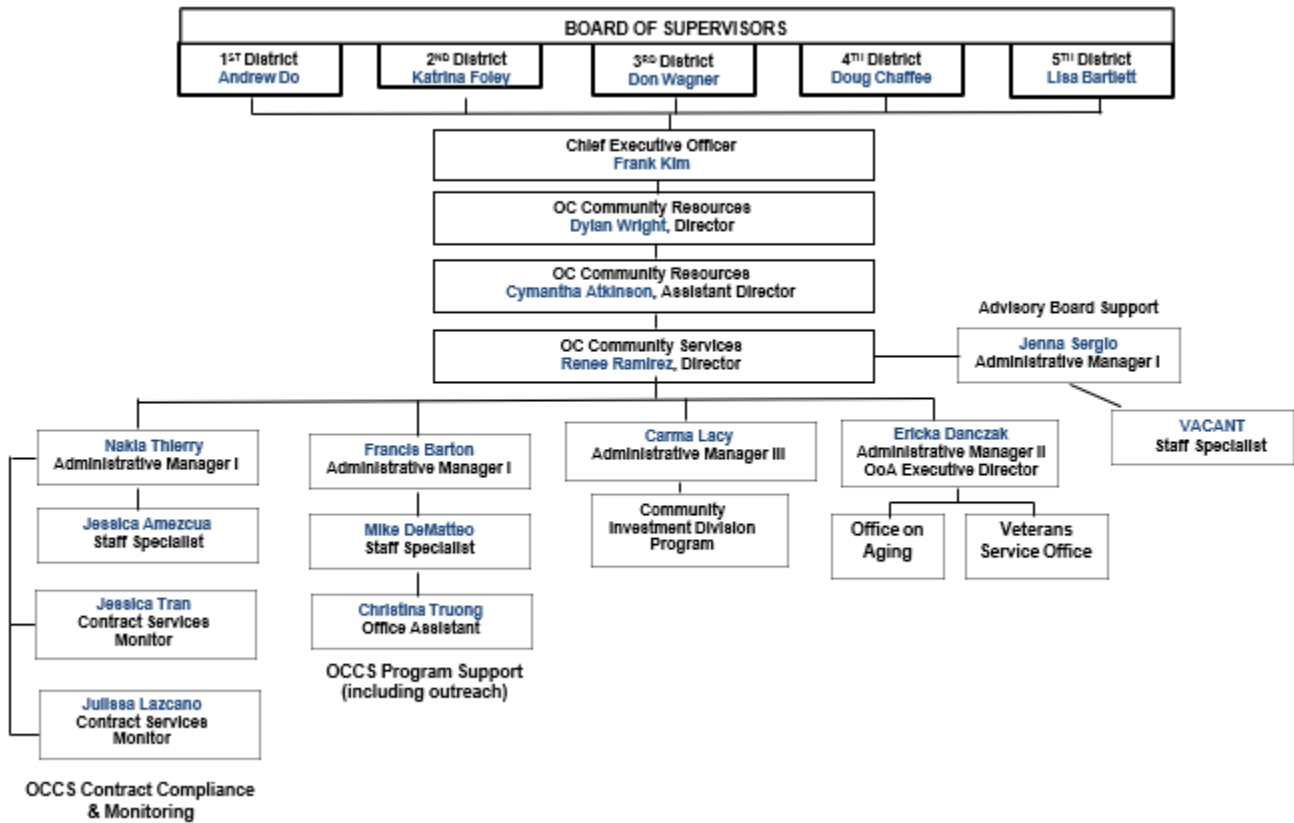
15. What are the barriers to accessing legal assistance in your PSA? Include proposed strategies for overcoming such barriers. Discuss:

Transportation is a prominent barrier to accessing legal assistance. The County of Orange has a vast area that is not easily covered by the local transportation authority. Offsite visits by the LSP to homebound older adults are conducted on a limited basis since they require a minimum of 2 staff members for security purposes. Partnerships and cross-referrals between the LSP and local transportation service providers may help mitigate this barrier to accessing legal assistance.

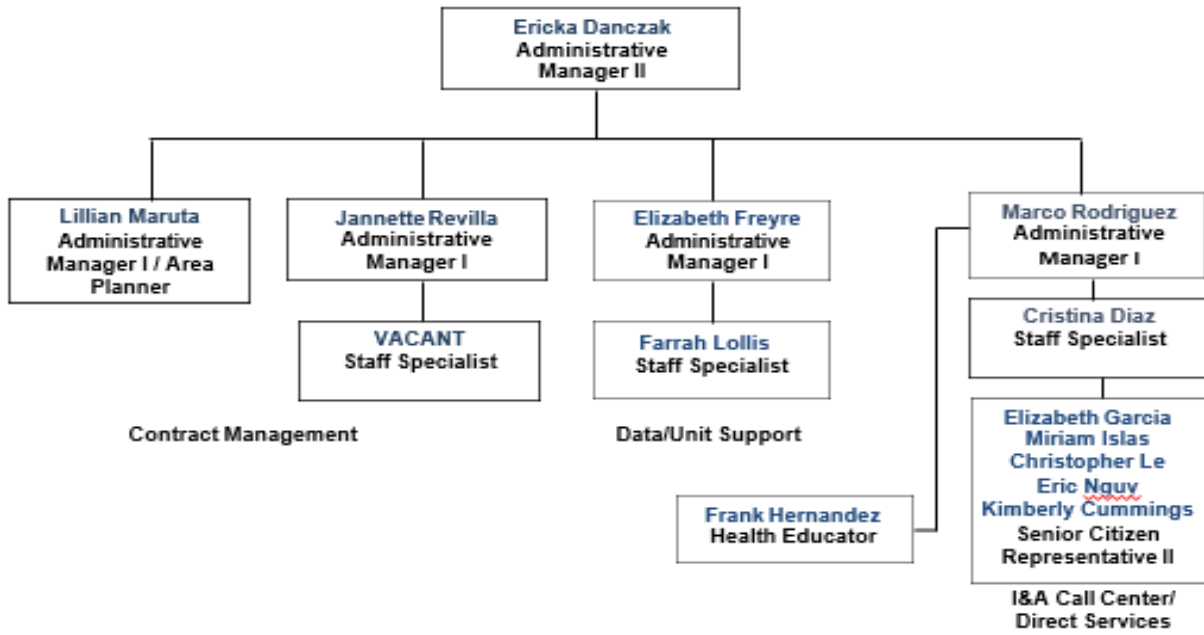
16. What other organizations or groups does your legal service provider coordinate services with? Discuss:

The LSP is involved with several local organizations serving older adults. They work with multiple senior and community services centers to conduct legal consultation appointments and deliver presentations. The LSP is also an active member of the Financial Abuse Specialist Team (FAST) and the Elder Abuse Forensics Center Team, which also involves Adult Protective Services (APS) and the Long-Term Care Ombudsman Program. The LSP also has an existing MOU with the local HICAP and Ombudsman program.

SECTION 21 - ORGANIZATION CHART: OC COMMUNITY SERVICES



SECTION 21 - ORGANIZATION CHART: OFFICE ON AGING



Name	Title III/VII Admin	Title III Direct	HICAP/FA/ MIPPA Admin	TV Admin	Other
Executive Director: E. Danczak	25%		2%	3%	70%
Admin Manager I: E. Freyre	65%	IIIB 10%, IIID 5%, IIIE 5%	5%	1%	9%
Admin Manager I: M. Rodriguez	20%	IIIB 30%, IIIE 20%			30%
Admin Manager I: L. Maruta	70%			5%	25%
Admin Manager I: J. Revilla	90%		10%		
Admin Manager I N. Thierry	30%		5%	4%	61%
Admin Manager I: J. Sergio	15%				85%
Admin Manager I: F. Barton	30%				70%
Staff Specialist: Vacant	70%		3%	3%	24%
Staff Specialist: C. Diaz	60%	IIID 10%			30%
Staff Specialist: M. De Matteo	25%				75%
Staff Specialist: F. Lollis	77%	IIID 5%	5%	3%	10%
Staff Specialist: J. Amezcua	34%		4%	2%	60%
Senior Citizen Rep.: E. Nguy	5%	IIIB 40%, IIIE 30%			25%
Senior Citizen Rep.: E. Garcia	5%	IIIB 40%, IIIE 30%			25%
Senior Citizen Rep.: C. Le	5%	IIIB 35%, IIIE 40%			20%
Senior Citizen Rep.: M. Islas	3%	IIIB 30%, IIID 2%, IIIE 30%			35%
Health Educator: F. Hernandez	5%	IIIB 5%, IIID 88%, IIIE 2%			
Office Supervisor: S. Munoz	20%				80%
Office Specialist: N. Malette	10%				90%
Office Assistant: C. Truong	20%	IIID 20%			60%
Contract Services Monitor: J. Lazcano	20%			2%	78%
Contract Services Monitor: J. Tran	51%		4%	5%	40%