

Area Plan Update

July 1, 2025, to June 30, 2026



OFFICE ON AGING
ORANGE COUNTY

California, PSA 22

California Department of Aging
Revised March 21, 2025

Table of Contents

AREA PLAN UPDATE (APU) CHECKLIST	3
TRANSMITTAL LETTER	4
SECTION 2. DESCRIPTION OF THE PLANNING AND SERVICE AREA (PSA).....	5
SECTION 6. PRIORITY SERVICES & PUBLIC HEARINGS	14
SECTION 8. SERVICE UNIT PLAN (SUP)	18
SECTION 11. LEGAL ASSISTANCE	50
SECTION 15. GOVERNING BOARD.....	51
SECTION 16. ADVISORY COUNCIL.....	54

AREA PLAN UPDATE (APU) CHECKLISTCheck one: FY25-26 FY 26-27 FY 27-28

Use for APUs only

AP Guidance Section	APU Components (Update/Submit A through G) ANNUALLY:	Check if Included
n/a	A) Transmittal Letter- (submit by email with electronic or scanned original signatures)	<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"/>
6	D) Priority Services and Public Hearings	<input checked="" type="checkbox"/>
n/a	E) Annual Budget, should match Org. Chart	<input checked="" type="checkbox"/>
8	F) Service Unit Plan (SUP) and LTC Ombudsman Program Outcomes	<input checked="" type="checkbox"/>
11	G) Legal Assistance	<input checked="" type="checkbox"/>

AP Guidance Section	APU Components (To be attached to the APU) ➤ <i>Update/Submit the following only if there has been a CHANGE to the section that was not included in the 2024-2028 Area Plan:</i>	Mark C for Changed	Mark N/C for Not Changed
1	Mission Statement	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	Needs Assessment/Targeting	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	AP Narrative Objectives:	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	• System-Building and Administration	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	• Title IIIB-Funded Programs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	• Title IIIB-Program Development/Coordination (PD or C)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	• Title IIIC-1 or Title IIIC-2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	• Title IIID-Evidence Based	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	• HICAP Program	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	Senior Centers and Focal Points	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10	Title IIIE-Family Caregiver Support Program	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12	Disaster Preparedness	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13	Notice of Intent to Provide Direct Services	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14	Request for Approval to Provide Direct Services	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15	Governing Board	<input checked="" type="checkbox"/>	<input type="checkbox"/>
16	Advisory Council	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17	Multipurpose Senior Center Acquisition or Construction	<input type="checkbox"/>	<input checked="" type="checkbox"/>
18	Organizational Chart(s) (Must match Budget)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
19	Assurances	<input type="checkbox"/>	<input checked="" type="checkbox"/>

TRANSMITTAL LETTER
2024-2028 Four Year Area Plan/ Annual Update
Check one: FY 24-25 FY 25-26 FY 26-27 FY 27-28

AAA Name: County of Orange 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 Commission have each had the opportunity to participate in the planning process and to review and comment on the Area Plan. The Governing Board, Advisory Commission, 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. Donald P. Wagner
 (Type Name)

 Signature: Governing Board Chair¹

04/23/2024
 Date

2. Crystal Miles
 (Type Name)

 Signature: Advisory Commission Chair

 Date

3. Claudia Harris
 (Type Name)

 Signature: Area Agency Director

 Date

***In a Minute Order dated 04/23/2024, the Orange County Board of Supervisors, as the governing body of the PSA 22, Area Agency on Aging, approved the 2024-2028 Area Plan and authorized the Director of the Office on Aging to execute and submit plan updates and amendments for the 2024-2028 planning period.**

¹ Original signatures or electronic signatures are required.

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

Approximately 529,832 older adults 65 years or older reside in Orange County. Although predominantly White (Non-Hispanic) (54.4%), the 65 and over population continues to be diverse with Asian making up approximately (23.8%) of the population, followed by Hispanic/Latino (17.2%), Black/African American (1.2%), American Indian/Alaskan Native (0.6%), Native Hawaiian/Pacific Islander (0.2%), and two or more races/other race (10.2%).¹ Although precise data on lower-income minority older adults in Orange County is not easily accessible, recent information indicates that about 28% of older adults (65 and over) in the county lack sufficient income to meet their basic needs, given the local cost of living.² This amounts to approximately 148,000 individuals experiencing economic insecurity.

¹ Source: U.S. Census Bureau, U.S. Department of Commerce. (2023). Population 65 years and over in the United States (Table S0103). American Community Survey, ACS 1-Year Estimates Subject Tables. <https://data.census.gov/table/ACSST1Y2023.S0103?q=s0103&g=050XX00US06059>.

² Source: Justice in Aging. (2023). Snapshot of older adults in Orange County: Economic security and access to services. Justice in Aging. <https://justiceinaging.org/wp-content/uploads/2023/03/Snapshot-of-Older-Adults-in-Orange-County-Accessible-Outline.pdf>

SECTION 6. PRIORITY SERVICES & PUBLIC HEARINGS

2024-2028 Four-Year Planning Cycle

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

The CCR, Article 3, Section 7312, requires the AAA to allocate an “adequate proportion” of federal funds to provide Access, In-Home Services, and Legal Assistance in the PSA. The annual minimum allocation is determined by the AAA through the planning process. The minimum percentages of applicable Title III B fund⁸ listed below have been identified for annual expenditure throughout the four-year planning period. These percentages are based on needs assessment findings, resources available within the PSA, and discussions at public hearings on the Area Plan.

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

Access:

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

2024-25 42 % 25-26 42 % 26-27 _____% 27-28 _____%

In-Home Services:

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

2024-25 20 % 25-26 20 % 26-27 _____% 27-28 _____%

Legal Assistance Required Activities:⁹

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

2024-25 12 % 25-26 12 % 26-27 _____% 27-28 _____%

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

The allocations are justified through a comprehensive analysis of various factors, including historical funding levels, service level trends, needs assessments, and anticipated future demands. To determine if the allocations are sufficient to meet the need, we conduct thorough assessments of the resources available against anticipated demand. This involves evaluating the effectiveness of past allocations, identifying any gaps in services, and forecasting future needs based on factors such as population growth, and changing service demands.

⁸Minimum 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.

⁹Legal Assistance must include all the following activities: Legal Advice, Representation, Assistance to the Ombudsman Program and Involvement in the Private Bar.

Furthermore, the Office on Aging engages in ongoing monitoring and evaluation to assess the adequacy of allocations. By regularly reviewing performance metrics, feedback mechanisms, and emerging trends, we can make informed adjustments to allocations as necessary to ensure that they remain sufficient to effectively address the identified needs.

PUBLIC HEARING:

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

Fiscal Year	Date	Location	Number of Attendees	Presented in languages other than English?¹⁰ Yes or No	Was hearing held at a Long-Term Care Facility?¹¹ Yes or No
2024-2025	03/08/24	Easterseals 1063 McGaw Ave. #100, Irvine, CA 92614	23	No	No
2025-2026	04/24/25	Easterseals 1063 McGaw Ave. #100, Irvine, CA 92614		No	No
2026-2027					
2027-2028					

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

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

The Area Plan draft was posted on the Office on Aging's website and for those who were unable to attend the public hearing and wanted to provide a comment could do so by emailing the areaagencyonaging@occr.ocgov.com.

The Office on Aging utilized its network of community organizations, service providers, senior centers, and disability advocacy groups to assist with reaching out to homebound and/or disabled older adults and help facilitate communication and engagement with their

¹⁰A translator is not required unless the AAA determines a significant number of attendees require translation services.

¹¹AAAs are encouraged to include individuals in LTC facilities in the planning process, but hearings are not required to be held in LTC facilities.

participants.

Furthermore, the Community Assessment Survey for Older Adults was administered to a random sample of 5,000 households with an older adult. These households first received a half-page postcard inviting them to complete the survey online, followed by a mailed hard copy survey packet which included a cover letter, a copy of the questionnaire and a postage-paid return envelope. The survey distribution was used as a form of outreach to seeking input in the planning process and ensure that homebound and disabled older adults were heard and considered in the decision-making process.

Additionally, the Office on Aging advertised the Area Plan Update draft in its newsletter and on social media platforms to increase awareness and encourage further public engagement. These channels were used to reach a broader audience and ensure that the community had multiple opportunities to provide input.

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.**

Not Applicable.

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.**

TBD.

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

TBD.

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

TBD.

SECTION 8. SERVICE UNIT PLAN (SUP)**TITLE III/VII SERVICE UNIT PLAN
CCR Article 3, Section 7300(d)**

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

For services not defined in OAAPS, refer to the [Service Categories and Data Dictionary](#).

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

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	2,200	2	
2025-2026	2,418	2	
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	4,400	2	
2025-2026	4,836	2	
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	600	2	
2025-2026	541	2	
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	32,000	2	
2025-2026	28,832	2	
2026-2027			
2027-2028			

Case Management (Access) Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	10,000	2	
2025-2026	9,010	2	
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	18,000	2	
2025-2026	18,000	2	
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	20,000	1	
2025-2026	18,020	1	
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	5,000	1	1.1
2025-2026	4,505	1	1.1
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	8,300	2	
2025-2026	8,300	2	
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	350,000	2	
2025-2026	315,350	2	
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	1,000,000	2	
2025-2026	950,000	2	
2026-2027			
2027-2028			

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	16	1, 2	
2025-2026	16	1, 2	
2026-2027			
2027-2028			

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

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

Title IIIB, Other Priority and Non-Priority Supportive Services

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

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

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

Other Supportive Service Category Senior Center Activities**Unit of Service = 1 Hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (if applicable)
2024-2025	20,000	2	
2025-2026	21,980	2	
2026-2027			
2027-2028			

Other Supportive Service Category Cash/Material Aid Unit of Service = 1 Assistance

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (If applicable)
2024-2025	14,500	2	
2025-2026	15,936	2	
2026-2027			
2027-2028			

Other Supportive Service Category Community Education Unit of Service = 1 Activity

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (If applicable)
2024-2025	40	1	
2025-2026	40	1	
2026-2027			
2027-2028			

Other Supportive Service Category Disaster Preparedness Materials**Unit of Service = 1 Activity**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (If applicable)
2024-2025	1,000	1	1.2
2025-2026	901	1	1.2
2026-2027			
2027-2028			

Other Supportive Service Category Residential Repairs/Modifications**Unit of Service = 1 Activity**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (If applicable)
2024-2025	15	2	
2025-2026	14	2	
2026-2027			
2027-2028			

Other Supportive Service Category Public Information**Unit of Service = 1 Activity**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (If applicable)
2024-2025	24	1	1.4
2025-2026	22	1	1.4
2026-2027			
2027-2028			

3. Title IIID/Health Promotion—Evidence-Based

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

Evidence-Based Program Name(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)

Unit of Service = 1 contact

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers (If applicable)
2024-2025	2,000	2	2.8
2025-2026	1,802	2	2.8
2026-2027			
2027-2028			

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

2024-2028 Four-Year Planning Cycle

As mandated by the Older Americans Act Reauthorization Act of 2020, the mission of the LTC Ombudsman Program is to seek resolution of problems and advocate for the rights of residents of LTC facilities with the goal of ensuring their dignity, quality of life, and quality of care.

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

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

Complete all Measures and Targets for Outcomes 1-3.

Outcome 1.

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

Measures and Targets:

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

Fiscal Year Baseline Resolution Rate	# Of complaints Resolved	+ # of partially resolved complaints	Divided by the total number of Complaints	= Baseline Resolution Rate	Fiscal Year Target Resolution Rate
2022-2023	806	0	1,111	73%	<u>73</u> % 2024-2025
2023-2024	984	0	1,262	78%	<u>78</u> % 2025-2026
2024-2025					<u> </u> % 2026-2027
2026-2027					<u> </u> % 2027-2028

Program Goals and Objective Numbers: Goal# 2

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

1. FY 2022-2023 Baseline: Number of Resident Council meetings attended <u>920</u> FY 2024-2025 Target: <u>920</u>
2. FY 2023-2024 Baseline: Number of Resident Council meetings attended <u>1,042</u> FY 2025-2026 Target: <u>1,042</u>
3. FY 2024-2025 Baseline: Number of Resident Council meetings attended _____ FY 2026-2027 Target: _____
4. FY 2025-2026 Baseline: Number of Resident Council meetings attended _____ FY 2027-2028 Target: _____
Program Goals and Objective Numbers: <u>2</u>

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

1. FY 2022-2023 Baseline: Number of Family Council meetings attended <u>21</u> FY 2024-2025 Target: <u>21</u>
2. FY 2023-2024 Baseline: Number of Family Council meetings attended <u>21</u> FY 2025-2026 Target: <u>21</u>
3. FY 2024-2025 Baseline: Number of Family Council meetings attended _____ FY 2026-2027 Target: _____
4. FY 2025-2026 Baseline: Number of Family Council meetings attended _____ FY 2027-2028 Target: _____
Program Goals and Objective Numbers: <u>2</u>

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 2022-2023 Baseline: Number of Instances <u>4,376</u> FY 2024-2025 Target: <u>4,376</u>
2. FY 2023-2024 Baseline: Number of Instances <u>4,479</u> FY 2025-2026 Target: <u>4,479</u>
3. FY 2024-2025 Baseline: Number of Instances _____ FY 2026-2027 Target: _____
5. FY 2025-2026 Baseline: Number of Instances _____ FY 2027-2028 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.

6. FY 2022-2023 Baseline: Number of Instances <u>9,662</u> FY 2024-2025 Target: <u>9,662</u>

7. FY 2023-2024 Baseline: Number of Instances <u>9,837</u> FY 2025-2026 Target: <u>9,837</u>
8. FY 2024-2025 Baseline: Number of Instances _____ FY 2026-2027 Target: _____
9. FY 2025-2026 Baseline: Number of Instances _____ FY 2027-2028 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 2022-2023 Baseline: Number of Sessions <u>15</u> FY 2024-2025 Target: <u>17</u>
2. FY 2023-2024 Baseline: Number of Sessions <u>14</u> FY 2025-2026 Target: <u>16</u>
3. FY 2024-2025 Baseline: Number of Sessions _____ FY 2026-2027 Target: _____
4. FY 2025-2026 Baseline: Number of Sessions _____ FY 2027-2028 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.

FY 2024-2025**FY 2024-2025 Systems Advocacy Effort(s):**

There is an increasing need to protect the state's growing population of vulnerable elderly and disabled residents in licensed facilities from abuse and neglect and to counter an unfortunate statewide decline in Program volunteers. Ombudsman advocacy in FY 24-25 must focus on improving the education about and the awareness of the Program. Ombudsmen, along with the California Long Term Care Ombudsman Association (CLTCOA), will advocate by educating legislators about Program accomplishments and the important role Ombudsmen have in securing the safety and well-being of the state's most vulnerable citizens.

FY 2025-2026**Outcome of FY 2024-2025 Efforts:**

The Systems Advocacy for FY 24-25 to educate state legislators about Program accomplishments was successful as demonstrated by acceptance of an increase in program funding through One-Time Only funds. This was due to a CLTCOA/Ombudsman Program designed proposal that was not dependent on General Funds.

FY 2025-2026 Systems Advocacy Effort(s):

This need continues into FY 25-26, however the advocacy will expand to efforts at the federal level to promote awareness of vital programs our vulnerable facility residents depend on. Joining national advocacy groups such as Consumer Voice, Center for Medicare Advocacy and Justice in Aging, Ombudsmen will educate their representatives in Washington on Medicaid, which is a key element of long-term skilled nursing facility payments and essential healthcare services. Similarly, Ombudsmen will educate representatives on Medicare as both programs are key to the health and safety of our core older adult constituency.

FY 2026-2027**Outcome of FY 2025-2026 Efforts:****FY 2026-2027 Systems Advocacy Effort(s):****FY 2027-2028****Outcome of 2026-2027 Efforts:****FY 2027-2028 Systems Advocacy Effort(s):**

Outcome 2.

Residents have regular access to an Ombudsman. [(Older Americans Act Reauthorization Act of 2020), Section 712(a)(3)(D), (5)(B)(ii)]

Measures and Targets:

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

1. FY 2022-2023 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint 67 divided by the total number of Nursing Facilities 72 = Baseline 93 %

FY 2024-2025 Target: 68

2. FY 2023-2024 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint 68 divided by the total number of Nursing Facilities 73 = Baseline 93 %

FY 2025-2026 Target: 69

3. FY 2024-2025 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint _____ divided by the total number of Nursing Facilities _____ = Baseline _____ %

FY 2026-2027 Target: _____

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

FY 2027-2028 Target: _____

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.

<p>1. FY 2022-2023 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint <u>734</u> divided by the total number of RCFEs <u>1,002</u> = Baseline <u>73</u> %</p> <p>FY 2024-2025 Target: <u>850</u></p>
<p>2. FY 2023-2024 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint 837 divided by the total number of RCFEs 1,068 = Baseline 78%</p> <p>FY 2025-2026 Target: <u>855</u></p>
<p>3. FY 2024-2025 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint _____ divided by the total number of RCFEs _____ = Baseline _____ %</p> <p>FY 2026-2027 Target: _____</p>
<p>4. FY 2025-2026 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint _____ divided by the total number of RCFEs _____ = Baseline _____ %</p> <p>FY 2027-2028 Target: _____</p>
<p>Program Goals and Objective Numbers: _____</p>

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.

<p>1. FY 2022-2023 Baseline: <u>13.46</u> FTEs FY 2024-2025 Target: <u>14.94</u> FTEs</p>
<p>2. FY 2023-2024 Baseline: <u>13.69</u> FTEs FY 2025-2026 Target: <u>13.69</u> FTEs</p>
<p>3. FY 2024-2025 Baseline: _____ FTEs FY 2026-2027 Target: _____ FTEs</p>
<p>4. FY 2025-2026 Baseline: _____ FTEs FY 2027-2028 Target: _____ FTEs</p>
<p>Program Goals and Objective Numbers: <u>2</u> _____</p>

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

1. FY 2022-2023 Baseline: Number of certified LTC Ombudsman volunteers <u>27</u> FY 2024-2025 Projected Number of certified LTC Ombudsman volunteers <u>30</u>
2. FY 2023-2024 Baseline: Number of certified LTC Ombudsman volunteers <u>24</u> FY 2025-2026 Projected Number of certified LTC Ombudsman volunteers <u>28</u>
3. FY 2024-2025 Baseline: Number of certified LTC Ombudsman volunteers _____ FY 2026-2027 Projected Number of certified LTC Ombudsman volunteers _____
4. FY 2025-2026 Baseline: Number of certified LTC Ombudsman volunteers _____ FY 2027-2028 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 2020, Section 712(c)]

Measures and Targets:

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

Some examples could include:

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

Fiscal Year 2024-25

The LTC Ombudsman program has several systems in place to ensure Ombudsmen are consistently submitting activities and complaint reports in a timely manner. All reports are tracked on a spreadsheet and the Ombudsmen report how and when the issue was resolved. Each month, Ombudsmen are provided with a list of their outstanding issues, which managers review. The LTC Ombudsman program will also begin auditing Ombudsmen in ODIN to ensure none are falling behind and to address any concerns.

Fiscal Year 2025-2026

The Program will provide two (2) trainings annually for new and veteran Ombudsmen that will be focused on documentation, both for Activities and for Cases. A particular focus will be on the distinction between a Case and an I&A (Information & Assistance), which has been an issue of concern and training on a statewide level.

Fiscal Year 2026-2027
Fiscal Year 2027-2028

TITLE VII ELDER ABUSE PREVENTION
SERVICE UNIT PLAN

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

<input type="checkbox"/>	Ombudsman Program
<input type="checkbox"/>	Legal Services Provider
<input type="checkbox"/>	Adult Protective Services
<input checked="" type="checkbox"/>	Other (explain/list) <ul style="list-style-type: none"> • Council on Aging- Southern California

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 IIIIE Family Caregiver Support Program, educational materials distributed, and hours of activity spent developing a coordinated system which addresses elder abuse prevention, investigation, and prosecution.

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 2020, 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 VII ELDER ABUSE PREVENTION SERVICE UNIT PLAN

The agency receiving Title VII Elder Abuse Prevention funding is: Council on Aging – Southern California.

Total # of:	2024-2025	2025-2026	2026-2027	2027-2028
Individuals Served	4,500	4,500		
Public Education Sessions	34	31		
Training Sessions for Professionals	21	19		
Training Sessions for Caregivers served by Title III E	6	6		
Hours Spent Developing a Coordinated System	300	300		

Fiscal Year	Total # of Copies of Educational Materials to be Distributed	Description of Educational Materials
2024-2025	8,000	FAST brochure and bookmarks, Healthcare Fraud brochure from Senior Medicare Patrol Materials.
2025-2026	8,000	FAST brochure and bookmarks, Healthcare Fraud brochure from Senior Medicare Patrol Materials; SPP Fraud Booklet, Recovery Guide, and Bookmark; and Answers Guide.
2026-2027		
2027-2028		

TITLE III E SERVICE UNIT PLAN

CCR Article 3, Section 7300(d)

2024-2028 Four-Year Planning Period

This Service Unit Plan (SUP) uses the five federally mandated service categories that encompass 16 subcategories. Refer to the [CDA Service Categories and Data Dictionary](#) for eligible activities and service unit measures. Specify proposed audience size or units of **service for ALL** budgeted funds.

Providing a goal with associated objectives is mandatory for services provided. The goal states the big picture and the objectives are the road map (specific and measurable activities) for achieving the big picture goal.

For example: **Goal 3:** Provide services to family caregivers that will support them in their caregiving role, thereby allowing the care receiver to maintain a healthy, safe lifestyle in the home setting.

- Objective 3.1: Contract for the delivery of virtual self-paced caregiver training modules. Review data monthly to strategize how to increase caregiver engagement in these modules.
- Objective 3.2: Facilitate a monthly in person support group for caregivers where they can share success stories and challenges, share information regarding experiences with HCBS. Respite day care will be available for their loved one if needed.
- Objective 3.3: Do caregiver assessments every 6 months to stay connected to the caregiver and knowledgeable about their needs.

Direct and/or Contracted III E Services

CATEGORIES (16 total)	1	2	3
Family Caregivers – Caregivers of Older Adults and Adults who are caring for an individual of any age with Alzheimer’s disease or a related disorder with neurological and organic brain dysfunction.	<i>Proposed</i> Units of Service	<i>Required</i> Goal #(s)	<i>Required</i> Objective #(s)
Caregiver Access Case Management	Total hours	<i>Required</i> Goal #(s)	<i>Required</i> Objective #(s)
2024-2025	4,000	2	2.2
2025-2026	4,000	2	2.2
2026-2027			
2027-2028			

Caregiver Access Information & Assistance	Total Contacts	<i>Required</i> Goal #(s)	<i>Required</i> Objective #(s)
2024-2025	16,000	2	2.5
2025-2026	16,000	2	2.5
2026-2027			
2027-2028			
Caregiver Information Services	# Of activities and Total est. audience (contacts) for above:	<i>Required</i> Goal #(s)	<i>Required</i> Objective #(s)
2024-2025	# Of activities and Total est. audience (contacts) for above: 226 Activities 177, 650 Est. Audience	2	2.1
2025-2026	# Of activities and Total est. audience (contacts) for above: 226 Activities 177, 650 Est. Audience	2	2.1

2026-2027	# Of activities and Total est. audience (contacts) for above:		
2027-2028	# Of activities and Total est. audience (contacts) for above:		
Caregiver Respite In-Home	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	1,385	2	2.2
2025-2026	1,248	2	2.2
2026-2027			
2027-2028			
Caregiver Respite Other	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	250	2	2.2
2025-2026	225	2	2.2
2026-2027			
2027-2028			
Caregiver Respite Out-of-Home Day Care	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	4,700	2	2.2
2025-2026	4,235	2	2.2
2026-2027			
2027-2028			
Caregiver Respite Out-of-Home Overnight Care	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Supplemental Services Assistive Technologies	Total Occurrences	Required Goal #(s)	Required Objective #(s)
2024-2025	15	2	2.2
2025-2026	15	2	2.2

2026-2027			
2027-2028			
Caregiver Supplemental Services Caregiver Assessment	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	825	2	2.2
2025-2026	825	2	2.2
2026-2027			
2027-2028			
Caregiver Supplemental Services Caregiver Registry	Total Occurrences	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Supplemental Services Consumable Supplies	Total occurrences	Required Goal #(s)	Required Objective #(s)
2024-2025	60	2	2.2
2025-2026	60	2	2.2
2026-2027			
2027-2028			
Caregiver Supplemental Services Home Modifications	Total occurrences	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Supplemental Services Legal Consultation	Total contacts	Required Goal #(s)	Required Objective #(s)
2024-2025	23	2	2.2
2025-2026	23	2	2.2
2026-2027			

2027-2028			
Caregiver Support Groups	Total sessions	Required Goal #(s)	Required Objective #(s)
2024-2025	120	2	2.2
2025-2026	120	2	2.2
2026-2027			
2027-2028			
Caregiver Support Training	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	500	2	2.2
2025-2026	500	2	2.2
2026-2027			
2027-2028			
Caregiver Support Counseling	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	600	2	2.2
2025-2026	600	2	2.2
2026-2027			
2027-2028			

Direct and/or Contracted IIIE Services- Older Relative Caregivers

CATEGORIES (16 total)	1	2	3
Older Relative Caregivers	Proposed Units of Service	Required Goal #(s)	Required Objective #(s)
Caregiver Access Case Management	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Access Information & Assistance	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		

2026-2027			
2027-2028			
Caregiver Information Services	# Of activities and Total est. audience (contacts) for above	Required Goal #(s)	Required Objective #(s)
2024-2025	# Of activities: Total est. audience for above: N/A		
2025-2026	# Of activities: Total est. audience for above: N/A		
2026-2027	# Of activities: Total est. audience for above: N/A		
2027-2028	# Of activities: Total est. audience for above: N/A		
Caregiver Respite In-Home	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Respite Other	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Respite Out-of-Home Day Care	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			

Caregiver Respite Out-of-Home Overnight Care	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Supplemental Services Assistive Technologies	Total Occurrences	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Supplemental Services Caregiver Assessment	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Supplemental Services Caregiver Registry	Total Occurrences	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Supplemental Services Consumable Supplies	Total occurrences	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			

Caregiver Supplemental Services Home Modifications	Total occurrences	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Supplemental Services Legal Consultation	Total contacts	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Support Groups	Total sessions	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Support Training	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			
Caregiver Support Counseling	Total hours	Required Goal #(s)	Required Objective #(s)
2024-2025	N/A		
2025-2026	N/A		
2026-2027			
2027-2028			

**HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (HICAP)
SERVICE UNIT PLAN
CCR Article 3, Section 7300(d)
WIC § 9535(b)**

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

CDA contracts with 26 AAAs to locally manage and provide HICAP services in all 58 counties. Four AAAs are contracted to provide HICAP services in multiple Planning and Service Areas (PSAs). The “Managing” AAA is responsible for providing HICAP services in a way that is equitable among the covered service areas.

HICAP PAID LEGAL SERVICES: Complete this section if HICAP Legal Services are included in the approved HICAP budget.

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

https://www.aging.ca.gov/Providers_and_Partners/Area_Agencies_on_Aging/Planning/

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

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

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

SECTION 1: STATE PERFORMANCE MEASURES

HICAP Fiscal Year (FY)	PM 1.1 Clients Counseled (Estimated)	Goal Numbers
2024-2025	4,769	1
2025-2026	4,769	1
2026-2027		
2027-2028		
HICAP Fiscal Year (FY)	PM 1.2 Public and Media Events (PAM) (Estimated)	Goal Numbers
2024-2025	254	1
2025-2026	254	1
2026-2027		
2027-2028		

SECTION 2: FEDERAL PERFORMANCE MEASURES

HICAP Fiscal Year (FY)	PM 2.1 Client Contacts (Interactive)	Goal Numbers
2024-2025	10,649	1
2025-2026	10,649	1
2026-2027		
2027-2028		
HICAP Fiscal Year (FY)	PM 2.2 PAM Outreach (Interactive)	Goal Numbers
2024-2025	5,629	1
2025-2026	5,629	1
2026-2027		
2027-2028		

HICAP Fiscal Year (FY)	PM 2.3 Medicare Beneficiaries Under 65	Goal Numbers
2024-2025	818	1, 2
2025-2026	818	1, 2
2026-2027		
2027-2028		

HICAP Fiscal Year (FY)	PM 2.4 Hard to Reach (Total)	PM 2.4a LIS	PM 2.4b Rural	PM 2.4c ESL	Goal Numbers
2024-2025	5,996	3,519	0	2,477	1, 2
2025-2026	5,996	3,519	0	2,477	1, 2
2026-2027					
2027-2028					

HICAP Fiscal Year (FY)	PM 2.5 Enrollment Contacts (Qualifying)	Goal Numbers
2024-2025	10,602	1
2025-2026	10,602	1
2026-2027		
2027-2028		

SECTION 3: HICAP LEGAL SERVICES UNITS OF SERVICES (IF APPLICABLE)¹⁴

HICAP Fiscal Year (FY)	PM 3.1 Estimated Number of Clients Represented Per FY (Unit of Service)	Goal Numbers
2024-2025	N/A	
2025-2026	N/A	
2026-2027		
2027-2028		
HICAP Fiscal Year (FY)	PM 3.2 Estimated Number of Legal Representation Hours Per FY (Unit of Service)	Goal Numbers
2024-2025	N/A	
2025-2026	N/A	
2026-2027		
2027-2028		
HICAP Fiscal Year (FY)	PM 3.3 Estimated Number of Program Consultation Hours Per FY (Unit of Service)	Goal Numbers
2024-2025	N/A	
2025-2026	N/A	
2026-2027		
2027-2028		

¹⁴Requires a contract for using HICAP funds to pay for HICAP Legal Services.

SECTION 11. LEGAL ASSISTANCE

2024-2028 Four-Year Area Planning Cycle

This section must be completed and submitted annually. The Older Americans Act Reauthorization Act of 2020 designates legal assistance as a priority service under Title III B [42 USC §3026(a)(2)]. CDA developed *California Statewide Guidelines for Legal Assistance* (Guidelines), which are to be used as best practices by CDA, AAAs and LSPs in the contracting and monitoring processes for legal services, and located at: <https://aging.ca.gov/Providers and Partners/Legal Services/#pp-gg>

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

A minimum of 12 percent.

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

In the past four years, landlord-tenant issues remain significantly high and the LSP continues to see a high volume of clients seeking elder abuse restraining orders. There has also been changes in the law with regards to conservatorships and preserving individual rights. These changes have required the LSP to undergo multiple trainings to remain abreast of the new laws. As a result, the needs of legal services have increased leading new and existing older adult clients to repeatedly contact the Legal Services Provider (LSP) to seek counseling, advice, and interpretations to remain informed. These shifts have affected funding levels, with an increased need for resources to address the growing demand for legal assistance. Compared to four years ago, funding has increased to support services, but the rising demand continues to challenge available resources.

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

The requirement to use the California Statewide Guidelines in the provision of Older Americans Act (OAA) legal services is included in the provider contract scope of services.

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

The Office on Aging (OoA) and LSP use client data, needs assessments, and the California Statewide Guidelines to review legal services priorities on an annual basis. In a collaborative effort the following legal service were established as priority issues:

- **Housing** related to landlord and tenant issues and subsidized housing.
- **Income Maintenance** including government benefits like Social Security and Supplemental Security Income (SSI)
- **Elder Abuse** to include financial and consumer scams.

- **Consumer Issues** related to probate, debt collection, and bankruptcy.

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

In a collaborative effort with the LSP, data from various internal, local and state sources is used to assist with identifying the targeted population. In addition, the LSP has become an active member in community stakeholder groups such as the Financial Elder Abuse Specialist Team (FAST) and the Elder Abuse Forensic Center (Currently being converted to APS & Community Partners MDT) to gather information and determine trending legal issues within the older adult population.

These collaborative efforts have assisted us with identifying the targeted population which are older adults aged 60 and older, specifically those who show the greatest economic and social needs, and limited access to resources.

Outreach efforts are used as a main mechanism for reaching targeted groups in Orange County include but are not limited to:

- Active participation in local events where the targeted population is likely to attend, providing opportunities for direct engagement and information sharing.
- Visiting outside county sites and clinics for legal presentation and clinics are also part of the LSP's monthly schedule.
- Utilizing digital outreach and traditional media, when funding is available, to advertise services which include, but not limited to social media, local publications, and websites. Such publications include:
 - Council on Aging's ANSWERS resource guide
 - El Clasificado
 - Laguna Woods Globe
 - Leisure World Weekly
 - Nguoi Viet
 - Radio ChieuThuBay
 - Facebook
- Conduct community outreach and education at senior centers, community-based organizations, and local community fairs where older adults can ask questions, speak to a LSP staff, and share contact information for further legal consultation.

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

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

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

The LSP utilizes a combination of outreach methods to effectively raise awareness and engage with the targeted population.

In addition to the outreach efforts outlined in question 5, the LSP does the following on a regular basis:

- Disseminates informational flyers throughout the community.
- Visits senior centers, senior apartment complexes and community service centers countywide to educate older adults, stakeholders, and the community on legal services offered.
- Conduct presentations and legal clinics in-person and virtually.
- Collaborate with community partners such as Boat People SOS, the Vietnamese Cancer Society, the County Community Service Center, and Leisure World in Seal Beach and participate in community events.
- Provide virtual and in-person outreach at community event and resource fairs.
- Offer weekly workshops at the Orange County Public Law Library on topics related to consumer defense.

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

Fiscal Year	Name of Provider	Geographic Region covered
2024-2025	a. Community Legal Aid SoCal b. c.	a. Countywide b. c.
2025-2026	a. Community Legal Aid SoCal b. c.	a. Countywide b. c.
2026-2027	a. b. c.	a. b. c.
2027-2028	a. b. c.	a. b. c.

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

The most widely used and preferred methods to accessing legal services are traditional methods which is calling the LSP's legal hotline and walking in.

Additionally, the targeted population can use any of the other available methods to access legal services which are:

- Visiting one of the multiple senior centers the LSP visits on a scheduled rotation.
- Utilizing the on-line intake application process.
- Scheduling their consultation via a virtual platform such as Zoom.
- Attend a virtual or in-person legal clinic.

Special accommodations are made to allow persons with disabilities or lack of access to technology to access legal services.

The LSP continues to explore other user-friendly platforms to broaden accessibility and encourage participation.

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

Major types of legal issues that are handled by the LSP include, but are not limited to:

- Government benefits and assistance
- Landlord-tenant disputes
- Elder abuse including financial abuse and consumer scams
- Probate
- Estate planning
- Immigration
- Health access
- Conservatorships

Although not new, the LSP has seen an upward trend for assistance in areas concerning conservatorships for family members, and landlord-tenant issues specifically for non-payment of rent, and elder abuse restraining orders against persons residing with the elderly client.

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

As a result of the COVID 19 pandemic, governmental agencies either suspended or limited access to in-person appearances and have required virtual appearances making access to technology a barrier.

To mitigate access to technology barriers the LSP created several workspaces within its physical offices to allow participants access to computers and make virtual appearances at court hearings, trials, and/or administrative law hearings. LSP staff is available to assist with setting up virtual appearances. Furthermore, the LSP continues to assist participants with technology issues through phone consultations.

Another prominent barrier when it comes to accessing legal services is access to transportation.

Proposed strategies to assist with mitigating transportation barriers include:

- Continue to offer limited offsite visits to homebound older adults.
- Augment current cross-referral system with local transportation service providers.
- Offer user-friendly remote platforms.

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

The LSP has a robust aging network of professional experts to coordinate and help facilitate

the planning of comprehensive services to the targeted population which consist of, but not limited to:

- Senior and community centers
- Financial Abuse Specialist Team
- Elder Abuse Forensics Center Team (Currently being converted to APS & Community Partners MDT)
- Adult Protective Services
- Social Services Agency
- Public Guardian
- Law Enforcement
- Legal Advocates
- Long-Term Care Ombudsman Program
- Council on Aging Southern California
- Orange County Superior Court
- 2-1-1

The LSP continues to augment their network by actively seeking partnerships with community stakeholders and government agencies to assist.

SECTION 15. GOVERNING BOARD**ORNAGE COUNTY BOARD OF SUPERVISORS MEMBERSHIP
2024-2028 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:
Janet Nguyen 1 st District	12/04/2028
Vincent Sarmiento 2 nd District	01/04/2027
Don Wagner 3 rd District	01/07/2027
Doug Chaffee 4 th District	01/04/2027
Katrina Foley 5 th District	01/04/2027

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

Andrew Do resigned from his position on October 22, 2024, and was succeeded by Janet Nguyen, who assumed the role after being elected on December 4, 2024.

Don Wagner's previous term was set to end on 01/06/2025. He was re-elected for a new term during the 2020 election, which will run until January 7, 2027.

SECTION 16. ADVISORY COUNCIL**ORANGE COUNTY OLDER ADULTS ADVISORY COMMISSION
2024-2028 Four-Year Planning Cycle**

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

Total Council Membership (include vacancies) 40

Number and Percent of Council Members over age 60: 21 75% Council 60+

Race/Ethnic Composition	% Of PSA's 60+Population*	% on Advisory
White	56%	54%
Hispanic	18%	7%
Black	1%	0%
Asian/Pacific Islander	23%	11%
Native American/Alaskan Native	1%	0%
Other (Includes some other race and two or more races)	19%	18%

*Source: U.S. Census Bureau, U.S. Department of Commerce. (2023). Population 60 years and over in the United States. American Community Survey, ACS 1-Year Estimates Subject Tables, Table S0102. Retrieved March 5, 2025, from https://data.census.gov/table/ACSST1Y2023.S0102?g=050XX00US06059_9700000US4104500

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

1. Crystal Miles – Chair	12/31/24
2. Rachel Owens – Vice Chair	01/06/25
3. Meredith Chillemi – Past Chair	12/31/23
4. Ken Higman – Secretary	12/31/24

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

5. Charlene Ashendorf	12/31/24
6. Debbie Baker	12/31/25
7. Cash Benton	12/31/25
8. Elizabeth Busick	12/31/23
9. Jerry Chang	12/31/23
10. Lynette Fujitani	12/31/24
11. Howard Hart	12/31/25
12. Eugene Hernandez	12/31/24

13. Richard Hernandez	01/04/27
14. Mariann Klinger	01/06/25
15. Janice Lim	12/31/25
16. Felix Lopez	01/04/27
17. Patty Mouton	01/04/27
18. Joan Nichols	01/04/27
19. John W. Pointer	12/31/23
20. Amina Sen-Matthews	01/06/25
21. Marty Simonoff	12/31/25
22. Preeti Singh	12/31/26
23. Barbara Sloate	12/31/23
24. Sandy Stang	12/31/23
25. Nathan Steele	12/31/24
26. Gary Taylor	12/31/26
27. Dave Tetzlaff	12/31/24
28. Dave Wheeler	12/31/24

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

Yes No

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

Yes No Additional Other (Optional)

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

Explain any “No” answer(s):

The Orange County Older Adults Advisory Commission (OCOAAC) members have the opportunity to indicate in their membership application if they represent any or all of the categories listed above. None of the current commission members have indicated that they are

Tribal Representatives, and/or identify themselves as LGBTQ.

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

According to the OCOAAC bylaws and pursuant to Government Code section 1302, a member whose term has expired may continue serving as a member until reappointed, resigns, or replaced.

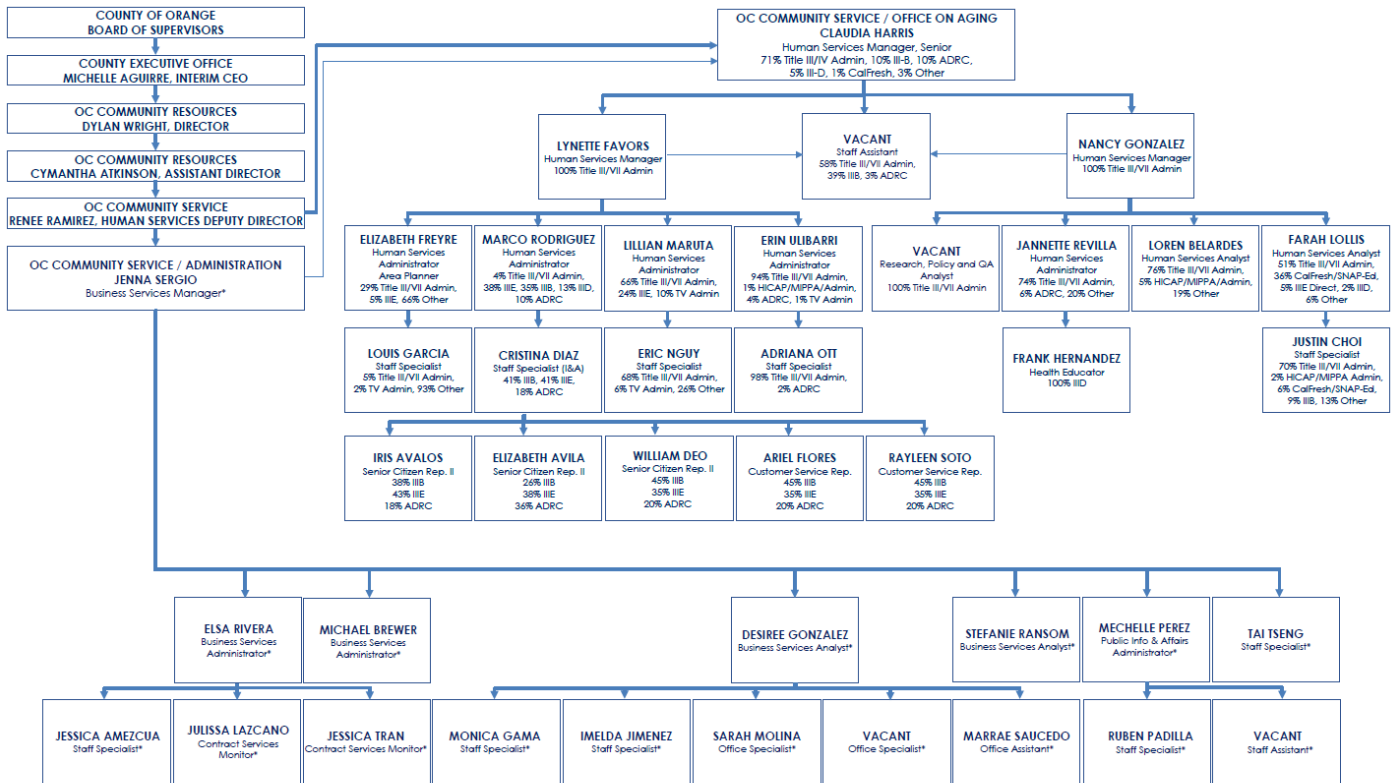
Briefly describe the local governing board's process to appoint Advisory Council members:

The OCOAAC consists of forty (40) members with the Board of Supervisors (Board) appointing ten (10) of those members. Commission members are appointed by the Board with each Supervisor nominating two (2) commission members from inside or outside of their respective district. No person living outside of the Supervisor's district shall be nominated for appointment to the Commission without the written consent of the Supervisor representing the district where the nominee resides.

The remaining twenty (20) members are appointed by the City Selection Committee (10 appointees) and the Advisory Commission's Executive Committee (10 appointees).

SECTION 18. ORGANIZATION CHART

**COUNTY OF ORANGE
OFFICE ON AGING ORGANIZATIONAL CHART**



*Administrative staff charges are calculated based on the actual time worked, percentage of time worked, or percentage of FTE of program general admin via a cost pool job number.