



VENTURA COUNTY AREA AGENCY ON AGING  
ADVISORY COUNCIL MEETING

May 12, 2021

9:00 a.m. to 11:00 am

Area Agency on Aging Advisory Council Center  
646 County Square Drive, Ventura

Via Zoom: <https://zoom.us/j/92625890902>

VCAAA Advisory Council Role – To provide leadership, input, and advocacy as facilitators between VCAAA and the community, in support of VCAAA’s mission.

VCAAA Role – VCAAA is the responsible agency to seek, serve, administer and manage available funding to ensure resources are allocated to serve Ventura County, creating integrated community-based services where older adults and people with disabilities can age in their community with dignity and respect.

AGENDA

- 9:00 a.m. 1. Call to Order and Agenda Review Suz  
Montgomery
  - 2. Pledge of Allegiance Suz  
Montgomery
  - 3. Approval of Area Agency on Aging Advisory Council Minutes of March 10, 2021 Suz  
Montgomery
  - 4. Public Comments
- Procedure: The public is welcome to comments. All comments not related to items on the agenda may be made at the beginning of the meeting only. Comments are limited to three minutes per person.
- 5. Consent Agenda Items Suz  
Montgomery
    - 5.1 Transportation Committee Report from March 10, 2021

DISCUSSION ITEMS/PRESENTATION/MOTION

- |     |   |                                |
|-----|---|--------------------------------|
| 6.1 | VCAAA Nominating Committee Report and Reappointment of One (1) Service Provider and Three (3) Focused Population Seats for FY 2021-2023 | Toni Olson                     |
| 6.2 | Recommendation to Renew FY 2021-2022 Grantee/Contractor Funding and Related Service Categories.   | Joaquin Serrato                |
| 6.3 | Ratification and Approval of the FY 2021-2022 Strategic Plan Update   | Victoria Jump                  |
| 6.4 | Recognition of Advisory Council members leaving the Council   | Monique Nowlin                 |
| 6.5 | VCAAA Covid 19 Response Update and Fiscal Outlook<br><i>Materials will be available 5/12/2021</i>                                       | Victoria Jump and Brian Murphy |
| 6.6 | Older Americans Month, PIO and Outreach Update  | Jannette Jauregui              |

INFORMATIONAL ITEMS

- |              |  |   |
|--------------|--|---|
| 7            | Advisory Council Committee Membership form for FY 2021 – 2022<br><i>Materials will be available 5/12/2021</i>  | Suz Montgomery  |
| 8            | Advisory Council Meeting Schedule for FY 2021-2022<br><i>Materials will be available 5/12/2021</i>   | Suz Montgomery  |
| 9            | Other Committee Meetings: <ul style="list-style-type: none"> <li>a. California Senior Legislature Update</li> <li>b. Triple A Council of California Update</li> <li>c. VCAAA Foundation Update</li> <li>d. LGBTQ Aging Coalition</li> <li>e. Dementia Friendly Ventura County</li> </ul> | Gitt/Gorback/<br>Guerra<br>Olson<br>Sherbok<br>Sherbok<br>Hashemzadeh |
| 10           | Comments from the Chair  | Suz Montgomery  |
| 11           | Other Business   | Suz Montgomery  |
| 11:00 am 12. | Adjournment  | Suz Montgomery  |

The next meeting will be:

Wednesday, July 14, 2021 (9:00 am – 11:00 am)

Via Zoom

Individuals who require accommodations for their disabilities (including interpreters and alternate formats) are requested to contact the Area Agency on Aging staff at (805) 477-7300 at least three days prior to the meeting.

Ventura County Area Agency on Aging  
Advisory Council Meeting Minutes  
Advisory Council Center  
646 County Square Drive, Suite 100  
Ventura, CA 93003  
March 10, 2021

Advisory Council Members Present:

Loretta Allen (Thousand Oaks COA)  
Danielle Anderson (Focused Population)  
Smita Dandekar (Supervisory Appointee)  
John Gardner (Camarillo COA)  
Tony Gitt (CSL)  
Karen Gorback (CSL)  
Lori Harasta (Ventura COA)  
Ari Larson (Filmore COA)  
Carol Martin (Simi Valley COA)  
Suz Montgomery (Chair) (Ventura CFS)  
Dr. Maria Munguia (Santa Paula COA)  
Bill Nugent (Ojai COA)  
Antoinette Olson (Simi Valley COA)  
Clark Owens (Oxnard COA)  
John Posta (Thousand Oaks COA)  
Jeanette Sanchez (Supervisory Appointee)  
Martha Shapiro (Service Provider)  
Marcy Sherbok (Focused Population)  
Sylvia Stein (Focused Population)  
Alice Sweetland (Oxnard COA)  
Sue Tatangelo (Focused Population)  
Mike Williams (Service Provider)  
Dr. Allen Zarkin (Camarillo COA)

Advisory Council Members Absent:

Aleta Bucklew (Thousand Oaks COA)  
Bill Cunneen (Supervisory Appointee)  
Deirdre Daly (Ojai COA)

VCAAA Staff Members Present:

Jakeline De Leon  
Julianna Eusano  
Dr. Haleh Hashemzadeh  
Jannette Jauregui  
Victoria Jump  
Brian Murphy

Denise Noguera  
Monique Nowlin  
Joaquin Serrato

Guests:

Diane Duncan  
Rossanna Guerra  
Jaydon Gaines  
Lynette Harvey  
Katy Krul  
Chris Morrow  
Peter Schreiner  
Ronda Wilkin

1. **Call to Order and Agenda Review** – The meeting was called to order at 9:04AM by Chair Suz Montgomery. Jakeline De Leon took roll call of the advisory council members. Suz introduced a new member to the Advisory Council, Jeanette Sanchez; she then introduced herself and a bit of her background.
2. **Pledge of Allegiance** – The Pledge of Allegiance was led by Chair Suz Montgomery.
3. **Approval of Area Agency on Aging Advisory Council Meeting Minutes of January 13, 2021** – (Owens/Olson/Passed)
4. **Public Comments** – Karen Gorback announced that Monday, March 15, 2021, at 10:30AM, she will be teaching “Pro’s with a Purpose” at Conejo Valley Adult School. Smita Dandekar announced that she will be conducting a yoga class via zoom for Simi Valley; it is an eight-week class and it is going very well.
5. **Consent Agenda Items** – All committee reports were approved (Gorback/Olson/Passed).
  - 5.1 Employment Committee Report from January 22, 2021
  - 5.2 Transportation Committee Report from January 13, 2021
  - 5.3 Health and Nutrition Committee Report from January 20, 2021
  - 5.4 Optimal Aging Committee Report from January 27, 2021

**DISCUSSION ITEMS/PRESENTATION/MOTION**

- 6.1 **VCAAA Nominating Committee Report and Election of Advisory Council Officers for FY 2021-2022 and Reappointment of One (1) Service Provider and One (1) Focused Population Seat for FY 2020-2022** – The motion was accepted to accept the slate as presented by the nominating

committee (Tatangelo/Olson/Passed). All committee members were in favor of slate being reappointed.

**6.2 VCAAA Nominating Committee Report and Election of (1) Service Provider – Health Care, (1) Consumer Seat, (1) Focused Population Seat – Behavioral Health for a Two Year Term (2021 – 2023) and (1) Seat – Behavioral Health for a Two Year Term (2021 – 2023) and (1) California Senior Legislature Representative for FY 2021-2025.** – Toni Olson presented the nominating committee report which included the following slate:

- Service Provider (Health Care) - Katy Krul and Lynette Harvey
- Focused Population - Behavioral Health: Peter Schreiner and Ronda Wilkin
- California State Legislator Seat - Rossanna Guerra

There were no further nominations. The slate was accepted by all committee members (Sweetland/Sherbok/Passed). The Advisory Council elected Lynette Harvey to the Service Provider (Health Care) for a two-year term and Peter Schreiner to the Focused Population seat for a two-year term and Rossanna Guerra to a four year term as the CSL representative.

**6.3 VCAAA Covid 19 Response Update** – Victoria gave an update on the VCAAA Covid 19 Response. Overall, VCAAA has hit over 3.5 million meals; closing in on 3.6 million meals served. All meals are being covered by FEMA Funds, the Older Americans Act Funds, the Cares Act funds, and additional funds. The budget is close to 60 million due to all of the efforts. As of now, there are over 50 restaurants participating in VCAAA’s various meal programs. There have been over 50 thousand requests for services. VCAAA has also been working with Human Service Agency and Public Health on vaccinating homebound older adults. The homebound vaccinations began in Piru. It began with the 75 plus older adults and now moving towards the 65 plus older adults. Letters of support are still being sent to VCAAA daily from the community. Lastly, Victoria reported that Google Home Devices have already gone out and been provided to the community. Suz Montgomery will be demonstrating to the community on social media how to use the Google Homes. There have been 500 chrome books purchased as well and are getting ready to go out soon. VCAAA is still working on receiving the Grand Pads.

**6.4 Recommendation for the Executive Committee to Approve the Planning and Allocation Committee’s Recommendations regarding FY 2020-2021 one-time-only funding from the California Department of Aging.** – The Advisory Council committee approved this recommendation (Gorback/Williams/Passed).

**6.5 Recommendation for the Executive Committee to Approve and Make Modifications to the FY 2021-2022 Strategic Plan based on Public Input and Forward to the Ventura County Board of Supervisors for Approval**

**(Due to CDA May 1, 2021).** – The Advisory Council committee approved this recommendation as stated in 6.5 of the agenda (Owens/Williams/Passed).

- 6.6 Long Term Care Ombudsman and Access to Facilities Update** – Sylvia Taylor Stein gave a brief overview of the Long-Term Care Services Ombudsman program and an update through a PowerPoint presentation. Monique will distribute Sylvia’s PowerPoint with all Advisory Council members.
- 6.7 Things You Should Know – COVID Rent Rules** – Mike Williams gave an update on the Covid Rent Rules through a PowerPoint presentation.
- 6.8 PIO and Outreach Update** – Jannette gave the PIO and Outreach Update. VCAAA has distributed more than 36 videos to the community from the last year, has distributed more than 160 different flyers over the last year and in January 2021, VCAAA launched the 2021 LiveWell Resource Guide. The VCAAA Foundation has had increased community donations due to the LiveWell Resource Guide. The VCAAA website has been modified and updated. The Letters of Support campaign started in September and it is continuing to this day. VCAAA has received approximately 10 thousand letters. Ongoing, VCAAA has a substantial increase in the amount of presentations both on local and national level. Social media following has increased as well. The latest outreach project is the VCAAA calendar, it is available both in English and Spanish. They include pictures of local residents and information in English and Spanish about different programs that VCAAA offers. Jannette then shared her screen with the committee and demonstrated the VCAAA websites new In Memoriam tab of all Advisory Council members who have passed to memorialize their service. Lastly, Jannette shared VCAAA’s latest video collaborating with the County CEO’s office, the Human Services Agency, and Health Care Agency to showcase the work that’s being done to get the vaccination to home bound seniors.

## **INFORMATIONAL ITEMS**

- 7. Advisory Council Committee Membership FY 2020-2021** – The list was included for informational purposes.
- 8. Advisory Council Meeting Schedule for FY 2020-2021** – The meeting schedule for FY 2020-2021 was included for informational purposes.
- 9. Other Committee Meetings:**
- a. California Senior Legislature Update** – Monique introduced Rosanna Guerra, the new appointed CSL representative. Tony then gave a brief update on CSL through a PowerPoint

presentation and announced that Senior Rally Day will be May 4, 2021 at 10AM via Zoom.

- b. Triple A Council of California Update** – Toni Olson gave a brief update on the Triple A Council of California. She announced that 3.4 million individuals in California as of March 5, 2021 have been fully vaccinated. California is also receiving 1.5 million doses per week of the vaccine, however in the next two weeks, the Johnson and Johnson vaccine will not be available for shipment to California. She announced by March 15<sup>th</sup>, from ages 16-64, they are opening vaccine appointments for individuals with underlining medical conditions. Lastly, she announced that any individuals who are having trouble getting the vaccine may go to the website: [www.myturn.ca.gov](http://www.myturn.ca.gov) or call +1(833) 422-4255.
  - c. VCAAA Foundation Update** – Marcy gave a brief update on the VCAAA Foundation.
  - d. LGBTQ Aging Coalition** – Martha gave a brief update on the LGBTQ Aging Coalition.
  - e. Dementia Friendly Ventura County** – Haleh gave a brief update on the Dementia Friendly Ventura County meeting
- 10. Comments from the Chair** – Suz announced that she will be on a “Empower Women, Past, Present, and Future” panel and she will be representing the Ventura Council Area on Aging.
- 11. Other Business** – No other discussions.
- 12. Adjournment** – The meeting was adjourned at 11:22AM (Owens/Olson).



**To:** Advisory Council Members  
**From:** Carol Martin, Committee Chair  
**Date:** March 10, 2021  
**Subject:** VCAAA Transportation Committee Report from March 10, 2021

Transportation Committee Members Present

Carol Martin (Chair) (Simi Valley) COA      John Posta (Thousand Oaks COA)  
Tony Gitt (CSL)      Clark Owens (Oxnard COA)

VCAAA Staff Members Present

Monique Nowlin      Jason Sagar  
Jakeline De Leon      Jannette Jauregui

1. **Welcome and Introductions** – Carol called the meeting to order at 11:27AM. No introductions were needed.
2. **Public Comments** – There were no public comments.
3. **Elderhelp Transportation Update; COVID Vaccine and Testing Sites** – Jason gave a brief update on the ElderHelp transportation program to include rides to the testing sites and for vaccinations. All vaccine locations can be found on [venturacountyrecovers.org](http://venturacountyrecovers.org). All appointments have been made through Information and Assistance at VCAAA. All rides are being provided by vendors free of charge to the older adult.
4. **Transportation Tab Website Update – PIO** – Jannette gave an update on the Transportation Tab website. Jannette added more information about the transportation services VCAAA provides and added more information on COVID services. She shared her screen with the committee and demonstrated all the new added information. Janette will add the ticket descriptions to the transportation website. Tony then suggested that, in the near future, an option should be added for scheduling appointments online and providing a link to the website tab for scheduling appointments.
5. **Discussion on Next Committee Project** – Monique suggested the next project should be developing the Online Trip Ordering System that VCAAA staff can work on. All committee members agreed to Monique’s suggestion and Tony then added developing a training video, PowerPoint, or adding instructions to the website to guide people on how to use the program. Tony also suggested getting one dial-a-

## **Agenda Item #5.1**

ride provider in the County to undertake with VCAAA to create a program, to find a solution on how to do door through door.

**6. Next Meeting Date – May 12, 2021 from 11AM – Noon**

**7. Adjournment –** The meeting was adjourned at 11:58AM (Owens/Posta).

**To:** Advisory Council Members

**From:** Toni Olson, Committee Chair

**Date:** May 3, 2021

**Subject:** VCAAA Nominating Committee Report and Reappointment of One (1) Service Provider and Three (3) Focused Population Seats for FY 2021-2023

The committee met via zoom on May 3, 2021, to discuss the need for filing the seats. Toni Olson served as chair of the committee. Committee members included Marcy Sherbok and Sylvia Taylor-Stein.

**Advisory Council Seats**

Per the current by-laws, individuals are limited to serving no more than two years. The committee discussed potential applicants and selected the following slate to present to the Advisory Council for election at the May meeting.

Focused Population – Caregiver	Maureen Hodge and Marcia Smart
Focused Population - LGBTQ:	Ron Berkowsky
Focused Population – Disability:	Carol Leish and Neill Spector

**Recommendation** - The committee is recommending that per the by-laws, an election be held to determine which of the above-mentioned individuals will occupy each seat. With the seats in which there is one applicant, the committee recommends that individual. Nominations from the floor will also be accepted and added to the slate.

The committee also discussed the one focused population seat whose term is expiring which is as follows:

Service Provider – Martha Shapiro (Senior Concerns)

**Recommendation** – The committee is recommending that that Martha be reelected to another two-year term for FY 2021-2023.



VENTURA COUNTY AREA AGENCY ON AGING

ADVISORY COUNCIL APPLICATION

APPLICATION FOR WHICH SEAT:

- Disability Advocate
- Lesbian, Gay, Bisexual, Transgendered or Questioning Advocate
- Family Caregiver Advocate

APPLICANT Maureen O'Keefe Hodge  
 ADDRESS: [REDACTED] PHONE: [REDACTED]  
Ventura, Ca 93003 FAX: [REDACTED]

1. Applicant is: (a) under 60 years of age  (b) over 60
2. Occupation/Title High Risk Program Manager
3. Your Employer Community Memorial Hospital
4. Your Email Address: mhodge@cmhshealth.org

5. Applicant:
- |   | Yes                                 | No                                  |
|---|-------------------------------------|-------------------------------------|
| (a) is a member of a minority race  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| (c) is <u>able</u> and <u>willing</u> to attend and participate in regular Advisory Council and Committee meetings. | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| (d) is capable of communicating opinions as a representative of the community you are applying to represent.        | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

6. Summarize your qualifications for appointment (i.e. education, training, employment, experiences, licenses, etc):

I am a Licensed Clinical Social Worker (LCSW) working the last 25 years in high risk populations. The last ten years I have worked specifically in health care settings including Community Memorial Health Systems (CMHS) and Oxnard Family Circle Adult Day program working with adults and their loved ones who face multiple issues including Alzheimer's, Dementia, Schizophrenia, Depression, and other mental and physical health conditions. I have spent 5 years living in a foreign country also working with the elderly and those who face extreme poverty. I am fully bilingual. Currently I manage a Pilot Program designed for Family Caregivers at CMHS.

7. Please briefly describe why you wish to serve on the Advisory Council:

While I have worked many years with caregivers and currently manage a Caregiver Navigation Program at CMHS, I have also personally cared for my mother who had Parkinson's and now have my 86 year old father living next door to me. Both professionally and personally I am committed to the issues caregivers face. Because I have lived abroad for many years, I also am sensitive to cultural nuances and have a firm belief that all voices be heard. I currently manage an exciting Caregiver Navigation program at CMHS that will hopefully bring to light strengths and weaknesses for caregivers and improve services for caregivers in our county. Serving on this Advisory Council I will be committed to helping raise the awareness, education, and services for our caregiving community.

**8. Community Involvement/Activities:**

I am active in both local and international programs. I currently serve as a volunteer at Encounter Church and am a Leader for Be the Bridge Racial Reconciliation group and Global Partners International Team. I am a leader with National Charity League volunteering the last 4 years with my daughter in programs including Food Share, Special Olympics, and homes for the Elderly. I also serve on the PTO for Foothill High School. I have served as a Board Member for the last 10 years for the Association for a More Just Society, which is an anti-corruption NGO with a focus on Honduras. I serve also with Servant Partners and am actively involved in international development for poor communities throughout the world.

**9. Special Interests:**

I have a passion for those who are disadvantaged and have worked tirelessly for advocating for those who cannot speak for themselves. I have helped launch 4 nonprofits (2 international) and helped raise over 20 million dollars for programs in San Bernardino, Riverside, and Los Angeles Counties as well as Honduras and Guatemala. While I do a lot of community and international work, I mostly love being with my family. We are avid hikers, enjoy backpacking together in the Sespe Wilderness, and I road and mountain bike on a regular basis.

**Applicant's Declaration and Signature**

I certify under penalty of perjury under the laws of the State of California that all the information on this form is true and correct.

Mamen O'Keefe Hodge

Signature

3/23/2021

Date



VENTURA COUNTY AREA AGENCY ON AGING  
ADVISORY COUNCIL APPLICATION

APPLICATION FOR WHICH SEAT:

- Disability Advocate
- Lesbian, Gay, Bisexual, Transgendered or Questioning Advocate
- Family Caregiver Advocate

APPLICANT: MARCI A SMART  
 ADDRESS: [REDACTED] PHONE: [REDACTED]  
THOUSAND OAKS 91360 FAX: —

1. Applicant is: (a) under 60 years of age  (b) over 60
2. Occupation/Title: RETIRED
3. Your Employer: \_\_\_\_\_
4. Your Email Address: marcia.smart@roadrunner.com

5. Applicant:
- |   | <u>Yes</u>                          | <u>No</u>                           |
|---|-------------------------------------|-------------------------------------|
| (a) is a member of a minority race  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| (c) is <u>able</u> and <u>willing</u> to attend and participate in regular Advisory Council and Committee meetings. | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| (d) is capable of communicating opinions as a representative of the community you are applying to represent.        | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

6. Summarize your qualifications for appointment (i.e. education, training, employment, experiences, licenses, etc):

I have years of experience working with the public, giving training programs and workshops, and public speaking engagements. My father suffered from dementia, and I was a caregiver for my husband, who passed away from Alzheimer's. So I understand first-hand the necessary emotional and physical requirements when caring for a failing loved one. I attended the support group held at Senior Concerns for over a year and gained more knowledge by listening to situations and challenges others faced as well.

7. Please briefly describe why you wish to serve on the Advisory Council:

I have been looking for a way to serve the community in a capacity that aligns with my organizational abilities and experiences. I considered becoming an Ombudsman, after I needed to put my husband in a facility and examined the options presented—which were often less than optimal. However, serving on a committee to advocate for family caregivers seems a better fit for me.

8. Community Involvement/Activities:

For over five years, I have served as the Coordinator of the Conejo Valley Writers Group. We meet at the Gobel Center and I have established a working relation with staff members there.

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9. Special Interests:

In addition to writing (I'm a published author of two books), I am a strong advocate for Senior fitness. I currently walk, Jazzercise and take ballet classes, as well as maintain a healthy diet (as long as you count chocolate). In that regard I think the Optimal Aging Committee would be a good match for my subcommittee involvement.

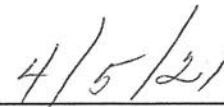
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10. **Applicant's Declaration and Signature**

I certify under penalty of perjury under the laws of the State of California that all the information on this form is true and correct.



Signature



Date



VENTURA COUNTY AREA AGENCY ON AGING

ADVISORY COUNCIL APPLICATION

APPLICATION FOR WHICH SEAT:

- Disability Advocate
- Lesbian, Gay, Bisexual, Transgendered or Questioning Advocate
- Family Caregiver Advocate

APPLICANT Ronald W. Berkowsky, PhD

ADDRESS: [REDACTED]  
Camarillo, CA 93012

PHONE: [REDACTED]  
FAX: \_\_\_\_\_

- 1. Applicant is: (a) under 60 years of age  (b) over 60
- 2. Occupation/Title Assistant Professor (Health Science Program)
- 3. Your Employer California State University Channel Islands
- 4. Your Email Address: ronald.berkowsky@csuci.edu

- 5. Applicant:
 

	<u>Yes</u>	<u>No</u>
(a) is a member of a minority race	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(c) is <u>able</u> and <u>willing</u> to attend and participate in regular Advisory Council and Committee meetings.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(d) is capable of communicating opinions as a representative of the community you are applying to represent.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Summarize your qualifications for appointment (i.e. education, training, employment, experiences, licenses, etc):  
 The entirety of my educational and work history has revolved around older adults and addressing issues related to aging. I received my PhD from the University of Alabama at Birmingham in 2014 along with a Certificate in Gerontology (my dissertation examined Internet use impacts among older adults). After, I worked as a Postdoctoral Associate (and, later, an Assistant Scientist) at the University of Miami Center on Aging from 2014-2018. Today, I am employed at California State University Channel Islands (CSUCI) where I teach mainly on topics related to gerontology, health informatics, and ethics in healthcare.

7. Please briefly describe why you wish to serve on the Advisory Council:  
 As an academic scholar who has studied and worked with older adults, I am cognizant and sensitive to the issues and needs of this segment of the community. Through my training and experience, I feel I may provide insight that can help promote and further the work of the VCAA Advisory Council. This extends to working with the Council to promote the well-being of LGBTQ+ older adults through VCAA activities and programs and to advocate for LGBTQ+ older adults for more programs and more program funding. I am cognizant of the unique issues that LGBTQ+ older adults face with regards to health outcomes, discrimination at the individual and institutional levels (e.g., barriers to care), health behaviors, levels of isolation/loneliness, etc. It is my intention to, through working with the Council, to highlight these issues and come up with strategies to address them and promote this vital segment of the Ventura County community (a community I will eventually join as I age, as I myself identify as bisexual). It is also my hope that, through collaborating with the Council, programs can be developed that involve other professionals and students from CSUCI, as I think their participation can help further the goals of the Council.



8. Community Involvement/Activities:

While a recent transplant to Ventura County (having moved to Camarillo in August of 2018), in my first few years I have involved myself in various initiatives at CSUCI, at the community level, at the national level, and at the professional level. Highlights include volunteering as a statistical consultant at Community Memorial Hospital (2019-present), serving as a member of the Senate Advisory Committee for the CSUCI Center for Multicultural Engagement (2020-2022), serving on the editorial board for the journal "The Gerontologist" (2020-present), and serving on the LGBT Aging Issues Network (LAIN) Council for the American Society on Aging (2020-present).

9. Special Interests:

As demonstrated in my research output, I have a keen interest in technology use among older adults (e.g., reasons for adoption, barriers to use, best practices in technology training, health impacts of use, etc.). I would love to help develop programs which increase technology access and promote well-being through use (e.g., develop programs to teach LGBTQ+ older adults and/or older adults in long-term care to use the Internet to help reduce isolation/loneliness).

10. **Applicant's Declaration and Signature**

I certify under penalty of perjury under the laws of the State of California that all the information on this form is true and correct.



04/06/2021

Signature

Date



VENTURA COUNTY AREA AGENCY ON AGING  
ADVISORY COUNCIL APPLICATION

APPLICATION FOR WHICH SEAT:

- Disability Advocate
- Lesbian, Gay, Bisexual, Transgendered or Questioning Advocate
- Family Caregiver Advocate

Carol Leish

APPLICANT

ADDRESS:

[REDACTED]  
Ventura, CA 93003

PHONE:

[REDACTED]

FAX: N/A

- 1. Applicant is: (a) under 60 years of age  (b) over 60
- 2. Occupation/Title Journalist/Motivational Speaker
- 3. Your Employer Self-Employed
- 4. Your Email Address: carol@callmecapable.net

- 5. Applicant:
 

	<u>Yes</u>	<u>No</u>
(a) is a member of a minority race	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(c) is <u>able and willing</u> to attend and participate in regular Advisory Council and Committee meetings.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(d) is capable of communicating opinions as a representative of the community you are applying to represent.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Summarize your qualifications for appointment (i.e. education, training, employment, experiences, licenses, etc): I have both a BA in Human Development and an MA in Education from CSU Sanbernardino. I've done/continue to do local journalism, such as for the, 'Ventura Breeze,' since 2013. My main focus has been on doing articles about people with disabilities (challenges). I also have/continue to do Motivational Speaking since 1997 that focuses on the capabilities that people with challenges have. It also focuses on ways of accommodating to various situations, such as typing this application instead

7. Please briefly describe why you wish to serve on the Advisory Council: of writing with a hand tremor.  
 I would like to serve on the Advisory Council in order to emphasize that people with disabilities (challenges), do have a voice in Ventura, and do need to be heard. Awareness and education, through the Advisory Council, are the first steps in order to eradicate prejudices towards people with challenges. It also helps to end stereotyping, just like my national speaking has done. I also want to emphasize that even though people may have challenges, they are more similar than different compared to people without challenges.

8. Community Involvement/Activities:

I've been writing for the, 'Ventura Breeze,' since 2013. I was a member of VCPWN (Ventura County Professional Women's Network), for 20 years. I wrote for their newsletter, 'Focal Points,' for 10 years. I've been a member of the Ladies Luncheon of Ventura for 15 years. I'm a member of the League of Women Voters. I'm also a member of the Women's VC Political Council.

9. Special Interests:

I enjoy playing popular music and Broadway Show tunes on the piano. I enjoy walking and swimming. I also enjoy photography.

10.

**Applicant's Declaration and Signature**

I certify under penalty of perjury under the laws of the State of California that all the information on this form is true and correct.

*Carol Leish*

3/21/2021

Signature

Date



VENTURA COUNTY AREA AGENCY ON AGING
ADVISORY COUNCIL APPLICATION

APPLICATION FOR WHICH SEAT:

- Disability Advocate (checked)
Lesbian, Gay, Bisexual, Transgendered or Questioning Advocate
Family Caregiver Advocate

APPLICANT: Neill Spector
ADDRESS: [Redacted] PHONE: [Redacted]
Simi Valley, CA 93065 FAX: [Redacted]

- 1. Applicant is: (a) under 60 years of age [ ] (b) over 60 [x]
2. Occupation/Title: Driver
3. Your Employer: DCH Auto Group
4. Your Email Address: nperry692@gmail.com

- 5. Applicant:
(a) is a member of a minority race [ ] Yes [ ] No [x]
(c) is able and willing to attend and participate in regular Advisory Council and Committee meetings. [x] Yes [ ] No [ ]
(d) is capable of communicating opinions as a representative of the community you are applying to represent. [x] Yes [ ] No [ ]

6. Summarize your qualifications for appointment (i.e. education, training, employment, experiences, licenses, etc):
As a senior with both friends, relatives & personal issues, (I have a visual limitation), I can empathize & relate to those with disabilities as I have for many years. That includes assisting & working with them to make life more bearable.

7. Please briefly describe why you wish to serve on the Advisory Council:
My first six years representing Simi Valley was an honor. It gave me pride to participate in a vital community organization. I want to offer my services & contribute to helping others in the community again.

8. Community Involvement/Activities:

*At present - none.*

9. Special Interests:

*Working ~~with~~ with the AAA counsel & staff  
to provide as much service & material needs  
to those less able & fortunate to benefit them & make  
life less stressful.*

10. **Applicant's Declaration and Signature**

I certify under penalty of perjury under the laws of the State of California that all the information on this form is true and correct.

*Neill K. [unclear]*

Signature

*3/24/21*

Date

TO: VCAAA Advisory Council Members

FROM: Joaquin Serrato, Grants and Contracts Administrator

DATE: May 12, 2021

SUBJECT: **Recommendation to Renew FY 2021-2022 Grantee/Contractor Funding and Related Service Categories.**

The service providers listed below are in their first, second, or third contract year; they are not at the end of their contract. All are being recommended by VCAAA staff for renewal, based on the applications received from the service providers and compliance with the terms and conditions of their FY 2021-2022 contracts. This addresses funding from the CDA only. Additional funding will likely be available and addressed separately when the funding award is known.

The table below provides a brief summary of the renewal reviews, and the worksheets that follow provide greater detail of each. Advisory Council Policy and Procedure III-G Contractual Procedures requires full Advisory Council approval for any proposed deviations from the original contracted service units of more than 10%, however, due to the COVID-19 impact, this will not be applicable as most of the grantees/contractors have far exceeded the 10% threshold. VCAAA staff reviewed the deviations and made revisions based on staff analysis of all service provider year-to-date performance levels and service level projections, with the goal of distributing funds to more accurately address the needs in each community and to revise service levels to correspond with what service providers have communicated they can provide.

	<b>SNP Service Provider</b>	<b>Funding Source</b>	<b>Project</b>	<b>Grant Amount</b>	<b>Renewal Recommendation</b>
1	Camarillo Health Care District	Title III C1 & C2	Senior Nutrition Program	\$96,058	Yes
2	City of Fillmore	Title III C1 & C2	Senior Nutrition Program	\$63,242	Yes
3	City of Moorpark	Title III C1 & C2	Senior Nutrition Program	\$31,615	Yes
4	City of Oxnard	Title III C1 & C2	Senior Nutrition Program	\$160,547	Yes
5	City of Port Hueneme	Title III C1 & C2	Senior Nutrition Program	\$57,030	Yes & AC Approval Required
6	City of Santa Paula	Title III C1 & C2	Senior Nutrition Program	\$106,241	Yes, with Contingencies
7	City of Simi Valley	Title III C1 & C2	Senior Nutrition Program	\$192,166	Yes & AC Approval Required

**Agenda Item #6.2**

8	City of Ventura	Title III C1 & C2	Senior Nutrition Program	\$75,410	Yes
9	HELP of Ojai	Title III C1 & C2	Senior Nutrition Program	\$81,552	Yes
10	Brenda's Casamia Restaurant & Catering	Title III C1 & C2	Senior Nutrition Program	\$63,771	Yes
11	Conejo Recreation & Park District	Title III C1	Senior Nutrition Program	\$101,101	Yes
12	Conejo Valley Senior Concerns	Title III C1 & C2	Senior Nutrition Program	\$117,000	Yes & AC Approval Required
<b>Total Meal Service Funding (289,576 Total Meals):</b>				<b>\$1,145,733</b>	
<b>Total Jordano's Food Costs (\$4.22 per meal):</b>				<b>\$972,085</b>	
<b>Total Meal Service &amp; Food Cost:</b>				<b>\$2,117,818</b>	

	<b>Non-SNP Service Provider</b>	<b>Funding Source</b>	<b>Project</b>	<b>Grant Amount</b>	<b>Renewal Recommendation</b>
13	Camarillo Health Care District	Title IIIB	Senior Support Line	\$50,000	Yes
14	Camarillo Health Care District	Title IIIE	Family Caregiver Resource Center	\$36,750	Yes
15	Conejo Valley Senior Concerns	Title IIIE	Family Caregiver Resource Center	\$26,750	Yes
16	Grey Law of Ventura County	Title IIIB, VIIb FAST, HICAP	Legal Services	\$74,000	Yes
17	Long Term Care Services of Ventura County	Title IIIE	Preplacement Counseling	\$27,624	Yes
18	Long Term Care Services of Ventura County	Title IIIB; VIIa; State: SDF; LCPF; SNF Q&A; IIIB	Long Term Care Ombudsman	\$364,698	Yes

<b>Grantee:</b>	<b>Camarillo Health Care District</b>			<b>1</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$96,058	
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022	
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes	
<input checked="" type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)			
<input type="checkbox"/> Title IIID	<input type="checkbox"/> Advisory Council Approval Required (see G)			
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No			
<input type="checkbox"/> Title V				
<input type="checkbox"/> Title VII				
<input type="checkbox"/> OMB				

**SUMMARY**

Due to the challenge of projecting the number of meals to be served for FY2122, CHCD proposed to provide the same quantity of meals reported for FY2021. HDM meals are delivered 5 days a week. This program is well managed and has a proven track record with VCAAA to provide accurate data in a timely manner and understands the SNP rules and regulations.

**I. Quality Assurance**

- a. Conformity to the intent of the RFP: Supports nutrition, socialization, health, senior independence.
- b. Adequate staff & resources: Qualified staff, trained volunteers, resources through CHCD
- c. Food quality: Yes

**II. Agency's History, Performance and Capacity**

- a. Proven ability: Operating with growth, acknowledging program regulations and restrictions
- b. Experience with the VCAAA: Since 2005, CHCD has served more than 360,000 HDMs to more than 3,000 unduplicated clients, following program requirements and regulations. Application supports this understanding.
- c. Ability to collaborate: Camarillo Council on Aging, Kiwanis, FOOD Share, and more

**III. Utilization of Program Funds**

- a. Bid price/Cost effectiveness: Budget conforms with standard program costs, utilizes volunteers, follows GASB (Governmental Accounting Standards Board)
- b. Ability leverage support: Camarillo Council on Aging – also uses other grant funding to supplement services.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	375	6,795	1812.0%
Home-Delivered Meals (C2)	1 meal	22,313	51,919	232.7%
Total (C1 + C2)	1 meal	22,688	58,714	258.8%



**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	500	500	0.0%
Home-Delivered Meals (C2)	1 meal	29,750	29,750	0.0%
Total (C1 + C2)	1 meal	30,250	30,250	0.0%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0		\$0
Home-Delivered Meals (C2)	\$3.11	\$0	29,750	\$92,523
Made-from-Scratch Meals (C1)	\$2.85	\$4.22	500	\$3,535
Made-from-Scratch Meals (C2)	\$3.11	\$4.22	0	\$0
<b>Total Funding (C1 + C2)</b>				<b>\$96,058</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		6.4%
Disability Status		14.9%
Living Alone (at risk for social isolation)		13.8%
Minority		24.9%
Limited English-Speaking Ability		7.6%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

N/A

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>City of Fillmore</b>		<b>2</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$63,242
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)		
<input type="checkbox"/> Title IIID	<input checked="" type="checkbox"/> Advisory Council Approval Required (see G)		
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No		
<input type="checkbox"/> Title V			
<input type="checkbox"/> Title VII			
<input type="checkbox"/> OMB			

**SUMMARY**

Fillmore's Active Adult Center has proposed hiring a new chef for the upcoming FY to begin offering hot meals to congregate and HDM clientele once again. Although Fillmore continued providing excellent meal service to seniors throughout the COVID-19 crisis, this grantee has consistently reported inaccurate meal and person count data on their Monthly Program Reports. While this grantee has made attempts to remedy the issues noted, they require disproportionate VCAAA staff time to address these issues through ongoing administrative and technical training.

I. Quality Assurance

- a. Conformity to the intent of the RFP: Supports nutrition & socialization, has onsite social services, provides community outreach
- b. Adequate staff & resources: Has adequate staff and volunteers to support program; city resources
- c. Food quality: Approved by VCAAA Registered Dietitian

II. Agency's History, Performance and Capacity

- a. Proven ability: Operating with growth, acknowledging program regulations and restrictions
- b. Experience with the VCAAA: Since 2005, the City of Fillmore has been providing SNP congregate and home-delivered meal services, following program requirements and regulations. Application supports this understanding.
- c. Ability to collaborate: Partners with VCAAA, Senior Services, Catholic Charities, FOOD Share, local churches

III. Utilization of Program Funds

- a. Bid price/Cost effectiveness:
- b. Ability leverage support: Works with city and local agencies

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	5,835	49,906	855.3%
Home-Delivered Meals (C2)	1 meal	3,570	5,007	140.3%
Total (C1 + C2)	1 meal	9,405	54,913	583.9%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	7,780	7,780	0.0%
Home-Delivered Meals (C2)	1 meal	4,760	4,760	0.0%
Total (C1 + C2)	1 meal	12,540	12,540	0.0%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0	3,918	\$11,166
Home-Delivered Meals (C2)	\$3.11	\$0	2,398	\$7,458
Made-from-Scratch Meals (C1)	\$2.85	\$4.22	3,862	\$27,304
Made-from-Scratch Meals (C2)	\$3.11	\$4.22	2,362	\$17,313
<b>Total Funding (C1 + C2)</b>				<b>\$63,242</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		24.7%
Disability Status		12.7%
Living Alone (at risk for social isolation)		7.8%
Minority		78.4%
Limited English-Speaking Ability		23.6%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>

Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input type="checkbox"/> Has some deficiencies (see F) <input checked="" type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

Fillmore's SNP has consistently reported inaccurate meal and person count data on the Monthly Program Reports throughout FY2021.

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>City of Moorpark</b>		<b>3</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$31,615
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)		
<input type="checkbox"/> Title IIID	<input type="checkbox"/> Advisory Council Approval Required (see G)		
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No		
<input type="checkbox"/> Title V			
<input type="checkbox"/> Title VII			
<input type="checkbox"/> OMB			

**SUMMARY**

The City of Moorpark proposes to continue serving hot home-delivered meals via multiple delivery routes, five days a week. This program is well managed and has a proven track record with VCAAA to provide accurate data in a timely manner and understands the SNP rules and regulations.

**I. Quality Assurance**

- a. Conformity to the intent of the RFP: Supports nutrition & socialization, has onsite social services, provides community outreach
- b. Adequate staff & resources: Qualified staff and volunteers to support program, city resources
- c. Food quality: Approved by VCAAA Registered Dietitian

**II. Agency's History, Performance and Capacity**

- a. Proven ability: Operating with growth, acknowledging program regulations and restrictions
- b. Experience with the VCAAA: Since 2004, the City of Moorpark has provided senior congregate and home-delivered meals through VCAAA, following program requirements and regulations. Track record as well as application support this understanding.
- c. Ability to collaborate: Partners with VCAAA, APS, various social service agencies, Senior Concerns, FOOD Share, Grey Law,

**III. Utilization of Program Funds**

- a. Bid price/Cost effectiveness: Sustains program within minimally funded budget. However, track record of donations (program income) is excessively low (see Box G)
- b. Ability leverage support: Works with local agencies

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	9,465	14,803	156.4%
Home-Delivered Meals (C2)	1 meal	6,806	6,221	91.4%
Total (C1 + C2)	1 meal	16,271	21,024	129.2%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	4,000	4,000	0.0%
Home-Delivered Meals (C2)	1 meal	6,500	6,500	0.0%
Total (C1 + C2)	1 meal	10,500	10,500	0.0%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0	4,000	\$11,400
Home-Delivered Meals (C2)	\$3.11	\$0	6,500	\$20,215
Made-from-Scratch Meals (C1)	\$0	\$4.22	0	\$0
Made-from-Scratch Meals (C2)	\$0	\$4.22	0	\$0
<b>Total Funding (C1 + C2)</b>				<b>\$31,615</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		7.2%
Disability Status		7.6%
Living Alone (at risk for social isolation)		13.7%
Minority		22.6%
Limited English-Speaking Ability		12.9%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\* Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
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<p>Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.</p>	<p>Meets most or all requirements <input checked="" type="checkbox"/>                  Has some deficiencies (see F) <input type="checkbox"/>                  Has major deficiencies (see F) <input type="checkbox"/></p>
<p>Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.</p>	<p>Meets most or all requirements <input checked="" type="checkbox"/>                  Has some deficiencies (see F) <input type="checkbox"/>                  Has major deficiencies (see F) <input type="checkbox"/></p>
<p>Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.</p>	<p>Meets most or all requirements <input checked="" type="checkbox"/>                  Has some deficiencies (see F) <input type="checkbox"/>                  Has major deficiencies (see F) <input type="checkbox"/></p>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

N/A

**H. Contract Contingency Requirements**

N/A



<b>Grantee:</b>	<b>City of Oxnard</b>			<b>4</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$160,547	
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022	
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes	
<input checked="" type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)			
<input type="checkbox"/> Title IIID	<input type="checkbox"/> Advisory Council Approval Required (see G)			
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No			
<input type="checkbox"/> Title V				
<input type="checkbox"/> Title VII				
<input type="checkbox"/> OMB				

**SUMMARY**

The City of Oxnard proposes to continue providing daily hot congregate (pick-up) and frozen home-delivered meals. The Wilson Center (senior Center) is currently the only site offering pick-up meals for congregate clientele due to the COVID-19 crisis. The City has proposed to take on all home-delivered meals and end its partnership with FOOD Share beginning July 1, 2021.

I. Quality Assurance

- a. Conformity to the intent of the RFP: Supports nutrition & socialization, referrals, community outreach
- b. Adequate staff & resources: Adequate staff to support program, city resources. Volunteers are minimum.
- c. Food quality: Approved by VCAAAA Registered Dietitian

II. Agency's History, Performance and Capacity

- a. Proven ability: Operating with growth, acknowledging program regulations and restrictions
- b. Experience with the VCAAAA: Since 2004, the City of Oxnard has provided senior congregate and home-delivered meals through VCAAAA, following program requirements and regulations.
- c. Ability to collaborate: Partners with VCAAAA, APS, FOOD Share

III. Utilization of Program Funds

- a. Bid price/Cost effectiveness: Uses Sungard Public Sector financial management system, guided by state and federal regulations.
- b. Ability leverage support: Plans to use Measure O funds for additional supplies, food delivery, etc., if necessary.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	15,045	25,595	170.1%
Home-Delivered Meals (C2)	1 meal	24,930	19,100	76.6%
Total (C1 + C2)	1 meal	39,975	44,695	111.8%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	20,060	20,060	0%
Home-Delivered Meals (C2)	1 meal	33,240	33,240	0%
Total (C1 + C2)	1 meal	53,300	53,300	0%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0	20,060	\$57,171
Home-Delivered Meals (C2)	\$3.11	\$0	33,240	\$103,376
Made-from-Scratch Meals (C1)	\$0	\$4.22	0	\$0
Made-from-Scratch Meals (C2)	\$0	\$4.22	0	\$0
<b>Total Funding (C1 + C2)</b>				<b>\$160,547</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		16.6%
Disability Status		12.7%
Living Alone (at risk for social isolation)		16.3%
Minority		73.5%
Limited English-Speaking Ability		32.3%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\* Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>

Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input type="checkbox"/> Has some deficiencies (see F) <input checked="" type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

None

**G. Concerns/Issues Regarding Contract**

The City of Oxnard's SNP has consistently reported inaccurate meal and person count data on the Monthly Program Reports throughout FY2021.

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>City of Port Hueneme</b>			<b>5</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$57,030	
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022	
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes	
<input checked="" type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)			
<input type="checkbox"/> Title IIID	<input checked="" type="checkbox"/> Advisory Council Approval Required (see G)			
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No			
<input type="checkbox"/> Title V				
<input type="checkbox"/> Title VII				
<input type="checkbox"/> OMB				

**SUMMARY**

The City of Port Hueneme typically provides only home-delivered meals, however, due to the COVID-19 crisis, it has provided congregate meals (home-delivered meals to folks who meet the congregate eligibility criteria) as well. It serves a weekly supply of frozen meals plus milk, bread, fruit and other VCAAA-approved items. It has a minimal staff and has a track record of performing within contracted levels and meeting reporting requirements.

**I. Quality Assurance**

- a. Conformity to the intent of the RFP: Supports nutrition to homebound seniors and provides referrals and community outreach
- b. Adequate staff & resources: Adequate staff to support program, city resources.
- c. Food quality: Approved by VCAAA Registered Dietitian

**II. Agency's History, Performance and Capacity**

- a. Proven ability: Provides services within program regulations and restrictions
- b. Experience with the VCAAA: Since 2005, the City of Port Hueneme has provided senior congregate and home-delivered meals through VCAAA, following program requirements and regulations. Track record and application support this understanding.
- c. Ability to collaborate: Partners with VCAAA, Hueneme Beautiful, Senior Volunteers

**III. Utilization of Program Funds**

- a. Bid price/Cost effectiveness: Follows accepted financial practices for municipal agencies.
- b. Ability leverage support: Participant and individual donations, Hueneme Beautiful annual donation, City of Port Hueneme Community Services donation program via utility bills and City website, special events such as merchandise sales and Hueneme Beach Festival.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	6,527	29,720	455.3%
Home-Delivered Meals (C2)	1 meal	10,127	7,968	78.7%
Total (C1 + C2)	1 meal	16,654	37,688	226.3%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	0	11,608	100%
Home-Delivered Meals (C2)	1 meal	7,700	7,700	0.0%
Total (C1 + C2)	1 meal	7,700	19,308	100%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0	11,608	\$33,083
Home-Delivered Meals (C2)	\$3.11	\$0	7,700	\$23,947
Made-from-Scratch Meals (C1)	\$0	\$4.22	0	\$0
Made-from-Scratch Meals (C2)	\$0	\$4.22	0	\$0
<b>Total Funding (C1 + C2)</b>				<b>\$57,030</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why  
 No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		15.0%
Disability Status		16.2%
Living Alone (at risk for social isolation)		10.1%
Minority		52.3%
Limited English-Speaking Ability		17.2%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

The City of Port Hueneme typically provides only home-delivered meals, however, due to the COVID-19 crisis, it has provided congregate meals (home-delivered meals to folks who meet the congregate eligibility criteria) to clientele throughout all of FY2021. Because the COVID-19 crisis is still in effect, they will continue offering congregate meals until CDA indicates otherwise.

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>City of Santa Paula</b>			<b>6</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$106,241	
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022	
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input type="checkbox"/> Yes	
<input checked="" type="checkbox"/> Title IIIC2	<input checked="" type="checkbox"/> Yes with Contingencies (see H)			
<input type="checkbox"/> Title IIID	<input checked="" type="checkbox"/> Advisory Council Approval Required (see G)			
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No			
<input type="checkbox"/> Title V				
<input type="checkbox"/> Title VII				
<input type="checkbox"/> OMB				

**SUMMARY**

The City of Santa Paula's SNP is well managed and provides nutritious meals to many older adults within its community. Despite the current COVID-19 crisis, they have continued to offer daily hot meals to congregate (pick-up) and home-delivered clientele. With regard to Data Reporting and Record Keeping, Santa Paula has had challenges consistently reporting accurate meal and person counts since the beginning of this fiscal year.

I. Quality Assurance

- a. Conformity to the intent of the RFP: Supports nutrition, socialization, referrals, provides community outreach
- b. Adequate staff & resources: Adequate staff to support program, city resources. Volunteers are minimum.
- c. Food quality: Approved by VCAAA Registered Dietitian

II. Agency's History, Performance and Capacity

- a. Proven ability: Santa Paula has recently gone through staff changes and is on track to meet service levels with growth. Staff follows program regulations and restrictions.
- b. Experience with the VCAAA: Since 2005, the City of Santa Paula has provided senior congregate meals through VCAAA. Track record and application support this understanding.
- c. Ability to collaborate: Partners with VCAAA, local churches, Vista Cove, Assistance Interest Meals Council (A.I.M.)

III. Utilization of Program Funds

- a. Bid price/Cost effectiveness:
- b. Ability leverage support:

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	5,400	20,119	372.6%
Home-Delivered Meals (C2)	1 meal	8,460	23,429	276.9%
Total (C1 + C2)	1 meal	13,860	43,548	314.2%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	7,200	7,200	0.0%
Home-Delivered Meals (C2)	1 meal	11,280	11,280	0.0%
Total (C1 + C2)	1 meal	18,480	18,480	0.0%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0	2,200	\$6,270
Home-Delivered Meals (C2)	\$3.11	\$0	4,280	\$13,311
Made-from-Scratch Meals (C1)	\$2.85	\$4.22	5,000	\$35,350
Made-from-Scratch Meals (C2)	\$3.11	\$4.22	7,000	\$51,310
<b>Total Funding (C1 + C2)</b>				<b>\$106,241</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		18.7%
Disability Status		14.4%
Living Alone (at risk for social isolation)		8.5%
Minority		81%
Limited English-Speaking Ability		27.9%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>



Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input type="checkbox"/> Has some deficiencies (see F) <input checked="" type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

Santa Paula's SNP has consistently reported inaccurate meal and person count data on the Monthly Program Reports throughout FY2021.

**H. Contract Contingency Requirements**

Will submit Legal Governing Body Resolution authorizing the submittal of the renewal application after the next city council meeting schedule for May 5, 2021.

<b>Grantee:</b>	<b>City of Simi Valley</b>			<b>7</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$192,166	
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022	
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes	
<input checked="" type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)			
<input type="checkbox"/> Title IIID	<input type="checkbox"/> Advisory Council Approval Required (see G)			
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No			
<input type="checkbox"/> Title V				
<input type="checkbox"/> Title VII				
<input type="checkbox"/> OMB				

**SUMMARY**

The City of Simi Valley provides excellent management of the Senior Nutrition Program, always looking to utilize technology and innovation to further enhance their program processes. It runs a stellar daily congregate (pick-up option currently due to COVID-19 crisis) and home-delivered meal program five days a week; it has 8 daily hot meal delivery routes and 2 weekly frozen routes. This provider continuously advocates for its senior population to ensure all seniors in need of meals are served.

**I. Quality Assurance**

- a. Conformity to the intent of the RFP: Supports nutrition & socialization, onsite social services, community outreach
- b. Adequate staff & resources: Qualified and highly trained staff and many volunteers to support program, has city and Council on Aging resources.
- c. Food quality: Approved by VCAAA Registered Dietitian

**II. Agency's History, Performance and Capacity**

- a. Proven ability: Operating with growth, acknowledging program regulations and restrictions
- b. Experience with the VCAAA: Since 2005, the City of Simi Valley has provided senior congregate and home-delivered meals via VCAAA with well-managed growth, following program requirements and regulations. Track record and application support this understanding.
- c. Ability to collaborate: Partners with VCAAA, APS, Senior Share, Shop Ahoy,

**III. Utilization of Program Funds**

- a. Bid price/Cost effectiveness: Uses in-kind donations for more volunteers
- b. Ability leverage support: Fiscal Services Department manages grant funding for SNP. Simi Valley's Council on Aging steps in to fund additional needed meals.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	25,933	73,252	282.5%
Home-Delivered Meals (C2)	1 meal	30,734	36,559	119.0%
Total (C1 + C2)	1 meal	56,667	109,811	193.8%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	11,000	14,214	29.2%
Home-Delivered Meals (C2)	1 meal	38,000	48,764	28.3%
Total (C1 + C2)	1 meal	49,000	62,978	28.5%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0	14,214	\$40,510
Home-Delivered Meals (C2)	\$3.11	\$0	48,764	\$151,656
Made-from-Scratch Meals (C1)	\$0	\$4.22	0	\$0
Made-from-Scratch Meals (C2)	\$0	\$4.22	0	\$0
<b>Total Funding (C1 + C2)</b>				<b>\$192,166</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		6.6%
Disability Status		10.8%
Living Alone (at risk for social isolation)		14.7%
Minority		24.7%
Limited English-Speaking Ability		9.3%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
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<p>Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.</p>	<p>Meets most or all requirements <input checked="" type="checkbox"/>                  Has some deficiencies (see F) <input type="checkbox"/>                  Has major deficiencies (see F) <input type="checkbox"/></p>
<p>Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.</p>	<p>Meets most or all requirements <input type="checkbox"/>                  Has some deficiencies (see F) <input checked="" type="checkbox"/>                  Has major deficiencies (see F) <input type="checkbox"/></p>
<p>Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.</p>	<p>Meets most or all requirements <input checked="" type="checkbox"/>                  Has some deficiencies (see F) <input type="checkbox"/>                  Has major deficiencies (see F) <input type="checkbox"/></p>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

Due to the present COVID-19 crisis, the demand for meal service has significantly increased. Therefore, the City of Simi Valley submitted a meal request higher than the allocated amount noted on the application renewal.

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>City of Ventura</b>		<b>8</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$75,410
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)		
<input type="checkbox"/> Title IIID	<input type="checkbox"/> Advisory Council Approval Required (see F & G)		
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No		
<input type="checkbox"/> Title V			
<input type="checkbox"/> Title VII			
<input type="checkbox"/> OMB			

**SUMMARY**

The City of Ventura's SNP is well managed and has a proven track record with VCAAA to provide accurate data in a timely manner and to understand SNP's regulations. Despite all the challenges the COVID-19 crisis has presented, including loss of critical staff, Ventura's SNP has continued to meet the demands of the senior population requesting congregate (pick-up) and home-delivered meals from their site.

**I. Quality Assurance**

- a. Conformity to the intent of the RFP: Supports nutrition, socialization, referrals, community outreach
- b. Adequate staff & resources: Designated qualified staff to support program, city resources. Initiating an ampler volunteer program.
- c. Food quality: Approved by VCAAA Registered Dietitian

**II. Agency's History, Performance and Capacity**

- a. Proven ability: Operating with growth, acknowledging program regulations and restrictions
- b. Experience with the VCAAA: Since 2005, the City of Ventura has provided senior congregate and home-delivered meals through VCAAA, following program requirements and regulations. Has operated two SNP sites in the past – on the west and east sides of town, as proposed. Track record and application support this understanding.
- c. Ability to collaborate: Partners with VCAAA, FOOD Share, nonprofits and other community partners

**III. Utilization of Program Funds**

- a. Bid price/Cost effectiveness: Uses standard budgeting procedures
- b. Ability leverage support: Partners with local agencies and nonprofits

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	7,500	27,294	363.9%
Home-Delivered Meals (C2)	1 meal	12,000	32,146	267.9%
Total (C1 + C2)	1 meal	19,500	59,440	304.8%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	10,000	9,000	-10.0%
Home-Delivered Meals (C2)	1 meal	16,000	16,000	0.0%
Total (C1 + C2)	1 meal	26,000	25,000	-3.8%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0	9,000	\$25,650
Home-Delivered Meals (C2)	\$3.11	\$0	16,000	\$49,760
Made-from-Scratch Meals (C1)	\$0	\$4.22	0	\$0
Made-from-Scratch Meals (C2)	\$0	\$4.22	0	\$0
<b>Total Funding (C1 + C2)</b>				<b>\$75,410</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		10.8%
Disability Status		13.3%
Living Alone (at risk for social isolation)		12.3%
Minority		21.7%
Limited English-Speaking Ability		9.4%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>

Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input type="checkbox"/> Has some deficiencies (see F) <input checked="" type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

The City of Ventura's SNP has consistently reported inaccurate meal and person count data on the Monthly Program Reports throughout FY2021, which can be attributed to the loss of staff.

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>HELP of Ojai</b>	
<b>Project:</b>	Senior Nutrition	<b>Funding:</b> \$81,552
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b> FY2021-2022
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>
<input checked="" type="checkbox"/> Title IIIC2	<input checked="" type="checkbox"/> Yes	
<input type="checkbox"/> Title IIID	<input type="checkbox"/> Yes with Contingencies (see H)	
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> Advisory Council Approval Required (see G)	
<input type="checkbox"/> Title V	<input type="checkbox"/> No	
<input type="checkbox"/> Title VII		
<input type="checkbox"/> OMB		

**SUMMARY**

HELP of Ojai has provided Senior Nutrition Program meals in the Ojai Valley for over 30 years. To serve more meals to its growing senior population, HELP of Ojai proposes to serve VCAAA-provided meals and provide made-from-scratch meals five days per week for congregate and hot daily home-delivered meals.

I. Quality Assurance

- a. Conformity to the intent of the RFP: Supports nutrition & socialization, has onsite social services, provides community outreach
- b. Adequate staff & resources: Has adequate staff and volunteers to support program and other resources through its nonprofit, strong board
- c. Food quality: Approved by VCAAA Registered Dietitian

II. Agency's History, Performance and Capacity

- a. Proven ability: Operating with growth, acknowledging program regulations and restrictions
- b. Experience with the VCAAA: HELP of Ojai has served Ojai Valley for 45 years, and for the past 30+ years has provided senior congregate and home-delivered meals. The nonprofit follows program requirements and regulations. Application supports this understanding.
- c. Ability to collaborate: Partners with VCAAA, APS, Retired Seniors Volunteer Program, Vons, Smart & Final, local farmers, Oliver Packing Equipment Solutions

III. Utilization of Program Funds

- a. Bid price/Cost effectiveness: Yes. HELP of Ojai has an accounting manager and uses a third-party CPA firm.
- b. Ability leverage support: Works with local agencies

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	10,867	24,308	223.7%
Home-Delivered Meals (C2)	1 meal	14,762	13,123	88.9%
Total (C1 + C2)	1 meal	25,629	37,431	146.0%



**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	4,180	4,180	0.0%
Home-Delivered Meals (C2)	1 meal	16,720	16,720	0.0%
Total (C1 + C2)	1 meal	20,900	20,900	0.0%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0	3,344	\$9,530
Home-Delivered Meals (C2)	\$3.11	\$0	13,376	\$41,599
Made-from-Scratch Meals (C1)	\$2.85	\$4.22	836	\$5,911
Made-from-Scratch Meals (C2)	\$3.11	\$4.22	3,344	\$24,512
<b>Total Funding (C1 + C2)</b>				<b>\$81,552</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		11.5%
Disability Status		13.7%
Living Alone (at risk for social isolation)		14%
Minority		6.6%
Limited English-Speaking Ability		7.2%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
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Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

N/A

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>Brenda's Casamia Restaurant &amp; Catering</b>		<b>10</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$63,771
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)		
<input type="checkbox"/> Title IIID	<input type="checkbox"/> Advisory Council Approval Required (see G)		
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No		
<input type="checkbox"/> Title V			
<input type="checkbox"/> Title VII			
<input type="checkbox"/> OMB			

**SUMMARY**

Brenda's Casamia is a current SNP vendor serving meals to the senior residents of the Piru region. Congregate and HDM meal services consist of hot meals provided daily.

I. Quality Assurance

a. Conformity to the intent of the RFP: Supports nutrition & socialization, has onsite social services, provides community outreach

b. Adequate staff & resources: Minimal staff and resources, yet has track record of meeting contracted services levels

c. Food quality: Approved by VCAAA Registered Dietitian

II. Agency's History, Performance and Capacity

a. Proven ability: Meets contracted levels of service

b. Experience with the VCAAA:

c. Ability to collaborate:

III. Utilization of Program Funds

a. Bid price/Cost effectiveness:

b. Ability leverage support:

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	22,146	22,580	102.0%
Home-Delivered Meals (C2)	1 meal	15,104	13,134	87.0%
Total (C1 + C2)	1 meal	37,250	35,714	95.9%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	5,020	5,020	0.0%
Home-Delivered Meals (C2)	1 meal	4,000	4,000	0.0%
Total (C1 + C2)	1 meal	9,020	9,020	0.0%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0	0	\$0
Home-Delivered Meals (C2)	\$2.85	\$0	0	\$0
Made-from-Scratch Meals (C1)	\$2.85	\$4.22	5,020	\$35,491
Made-from-Scratch Meals (C2)	\$2.85	\$4.22	4,000	\$28,280
<b>Total Funding (C1 + C2)</b>				<b>\$63,771</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		15%
Disability Status		67%
Living Alone (at risk for social isolation)		11%
Minority		85%
Limited English-Speaking Ability		30%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

N/A

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>Conejo Recreation &amp; Park District</b>		<b>11</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$101,101
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes
<input type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)		
<input type="checkbox"/> Title IIID	<input type="checkbox"/> Advisory Council Approval Required (see G)		
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No		
<input type="checkbox"/> Title V			
<input type="checkbox"/> Title VII			
<input type="checkbox"/> OMB			

**SUMMARY**

CRPD's Congregate Meal Program has 656 active clients at its Conejo Creek Grill at the Goebel Adult Community Center. This vendor's typically offers a Café-style model of service, however, due to COVID-19, the program has shifted and now offers meal service via a pick-up program for seniors in Thousand Oaks. The friendly and professional CRPD staff, along with the numerous VCAAA volunteers from the Conejo Senior Volunteer Program (CSVP) contribute to this SNP site's success.

I. Quality Assurance

- a. Conformity to the intent of the RFP: Supports nutrition, socialization, onsite services, community outreach
- b. Adequate staff & resources: Qualified staff and resources
- c. Food quality: Approved by VCAAA Registered Dietitian

II. Agency's History, Performance and Capacity

- a. Proven ability: Operating with growth, acknowledging program regulations and restrictions
- b. Experience with the VCAAA: Since 2010, CRPD has been providing congregate meal services at Goebel, following program requirements and regulations. Application supports this understanding.
- c. Ability to collaborate: Contracts with Chef it Up! Orders food & supplies from Jordano's and Sysco.

III. Utilization of Program Funds

- a. Bid price/Cost effectiveness: Conforms with standard program costs of \$7.07 per meal (\$2.85 per meal for C1 program costs & \$4.11 for food costs)
- b. Ability leverage support:

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	26,300	31,215	118.7%
Home-Delivered Meals (C2)	1 meal	0	0	N/A
Total (C1 + C2)	1 meal	26,300	31,215	118.7%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	14,300	14,300	0.0%
Home-Delivered Meals (C2)	1 meal	0	0	N/A
Total (C1 + C2)	1 meal	14,300	14,300	0.0%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$2.85	\$0		\$0
Home-Delivered Meals (C2)	\$3.11	\$0	0	\$0
Made-from-Scratch Meals (C1)	\$2.85	\$4.22	14,300	\$101,101
Made-from-Scratch Meals (C2)	\$3.11	\$4.22	0	\$0
<b>Total Funding (C1 + C2)</b>				<b>\$101,101</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		6.80%
Disability Status		10.50%
Living Alone (at risk for social isolation)		10%
Minority		29.70%
Limited English-Speaking Ability		9.40%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
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Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

N/A

**H. Contract Contingency Requirements**

N/A



<b>Grantee:</b>	<b>Conejo Valley Senior Concerns</b>		<b>12</b>
<b>Project:</b>	Senior Nutrition	<b>Funding:</b>	\$117,000
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input checked="" type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)		
<input type="checkbox"/> Title IIID	<input checked="" type="checkbox"/> Advisory Council Approval Required (see G)		
<input type="checkbox"/> Title IIIE	<input type="checkbox"/> No		
<input type="checkbox"/> Title V			
<input type="checkbox"/> Title VII			
<input type="checkbox"/> OMB			

**SUMMARY**

Senior Concerns is a current SNP vendor serving meals to the senior residents of the Thousand Oaks and Westlake Village region. Congregate and HDM meal services consist of hot meals provided daily.

I. Quality Assurance

a. Conformity to the intent of the RFP: Supports nutrition & socialization, has onsite social services, provides community outreach

b. Adequate staff & resources: Minimal staff and resources, yet has track record of meeting contracted services levels

c. Food quality:

II. Agency's History, Performance and Capacity:

a. Proven ability: Meets contracted levels of service:

b. Experience with the VCAAA:

c. Ability to collaborate:

III. Utilization of Program Funds

a. Bid price/Cost effectiveness:

b. Ability leverage support:

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Congregate Meals (C1)	1 meal	26,000	29,480	113.4%
Home-Delivered Meals (C2)	1 meal	10,800	8,063	74.7%
Total (C1 + C2)	1 meal	36,800	37,543	102.0%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Congregate Meals (C1)	1 meal	5,300	13,000	145.3%
Home-Delivered Meals (C2)	1 meal	4,700	0	-100.0%
Total (C1 + C2)	1 meal	10,000	13,000	30.0%

Service Category	Standard Funding per Meal	Food Funding per Meal	Service Proposal (# of Meals)	Funding for Proposal (\$)
Congregate Meals (C1)	\$9.00	\$0	13,000	\$117,000
Home-Delivered Meals (C2)	\$9.00	\$0		\$0
Made-from-Scratch Meals (C1)	\$9.00	\$0		\$0
Made-from-Scratch Meals (C2)	\$9.00	\$0		\$0
<b>Total Funding (C1 + C2)</b>				<b>\$117,000</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

Service Targeting Category	60+ Population Served*	Total Area Demographics**
Low Income (at or below fed poverty level)		6.80%
Disability Status		10.50%
Living Alone (at risk for social isolation)		10%
Minority		29.70%
Limited English-Speaking Ability		9.40%
High nutritional risk		N/A

\*Source: Q CareAccess demographic data was not a requirement for congregate clientele per CDA guidance due to COVID-19, therefore this data is unavailable.

\*\*Source: U.S. Census Bureau, 2015

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

Conejo Valley Senior Concerns is a new vendor that was not part of the RFP process. They typically provide only home-delivered meals (via independent Meals on Wheels program), however, due to the COVID-19 crisis, it has provided congregate meals (home-delivered meals to folks who meet the congregate eligibility criteria) to clientele throughout all of FY2021. Because the COVID-19 crisis is still in effect, they will continue offering congregate meals until CDA indicates otherwise.

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>Camarillo Health Care District</b>		<b>13</b>
<b>Project:</b>	Senior Helpline	<b>Funding:</b>	\$50,000
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input checked="" type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input type="checkbox"/> Title IIIC1 <input type="checkbox"/> Title IIIC2 <input type="checkbox"/> Title IIID <input type="checkbox"/> Title IIIE <input type="checkbox"/> Title V <input type="checkbox"/> Title VII <input type="checkbox"/> Ombudsman	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> Yes with Contingencies (see H) <input type="checkbox"/> Advisory Council Approval Required <input type="checkbox"/> No

**SUMMARY**

This program provides telephone reassurance for Ventura County residents, age 60 or older, who are at risk of increased isolation, victimization and other health concerns. Working with skilled volunteers and University interns, under the guidance of a state-licensed social worker, Peer Counseling was at 151% of contracted service in Quarter 1 and 181% in Quarter 3. Telephone Reassurance was at 144% in Quarter 1 and 173% in Quarter 3. Due to the COVID-19 crisis, many older adults have overwhelmingly reached out the SSL for emotional support.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Peer Counseling	1 hour	462	682	111%
Minimum # Unduplicated Clients	1 client	281	712	190%
Telephone Reassurance	1 contact	1,677	2,966	177%
Minimum # Unduplicated Clients	1 client	209	882	423%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current Fiscal Year Contracted (Original)	Next Fiscal Year Requested	% Change
Peer Counseling (1 hour)	1 hour	616	616	0.0%
Minimum # Unduplicated Clients	1 client	375	375	0.0%
Telephone Reassurance	1 contact	2,236	2,236	0.0%
Minimum # Unduplicated Clients	1 client	278	278	0.0%

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

N/A

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

N/A

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>Camarillo Health Care District</b>		<b>14</b>
<b>Project:</b>	Family Caregiver Resource Center	<b>Funding:</b>	\$36,750
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input type="checkbox"/> Title IIIC1 <input type="checkbox"/> Title IIIC2 <input type="checkbox"/> Title IIID <input checked="" type="checkbox"/> Title IIIE <input type="checkbox"/> Title V <input type="checkbox"/> Title VII <input type="checkbox"/> OMB	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> Yes with Contingencies (see H) <input type="checkbox"/> Advisory Council Approval Required (see G) <input type="checkbox"/> No

**SUMMARY**

Camarillo Health Care District’s Family Caregiver Resource Center Program provides two NAPIS 1 (Support), two NAPIS 2 (Respite) and two NAPIS 3 (Supplemental) services. Accompanying this program are private caregiver Consultation services; a Tools for Caregivers 6-week series of classes; the Kroll Library of information, education and resources; and Support Groups for caregivers. Due to the COVID-19 crisis, service requests have decreased compared to the FY1920. Year to date, this program has served a total of 6 clients in Caregiver Training and Counseling; 24 clients in Caregiver Adaptations and Assistive Devices; and 30 for In-Home Respite and Adult Day Care services.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted*	YTD Units Delivered	YTD % to Goal
Caregiver Training	1 Hour	169	112	66%
<b>SUPPORT TOTAL</b>	<b>1 Hour</b>	<b>394</b>	<b>187</b>	<b>66%</b>
Caregiver Adaptations	1 Occurrence	70	32	46%
Assistive Devices	1 Occurrence	6	6	100%
<b>SUPPLEMENTAL TOTAL</b>	<b>1 Occurrence</b>	<b>30</b>	<b>65</b>	<b>50%</b>
In-Home Supervision	1 Hour	744	503	68%
Adult Day Care	1 Hour	500.25	2.5	0%
<b>RESPITE TOTAL</b>	<b>1 Hour</b>	<b>1045.50</b>	<b>1079.75</b>	<b>41%</b>

\* OTO Contract Amendment effective 3/30/2021 through 6/30/2021: Caregiver Training service units increased from 100 to 225; Caregiver Adaptations service units increased from 68 to 93 occurrences; Assistive Devices units increased from 3 to 8 occurrences; Respite In-Home Supervision increased from 522 to 992 hours.

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Caregiver Training	1 Hour	100	113	13%
<b>SUPPORT TOTAL</b>	<b>1 Hour</b>	<b>100</b>	<b>113</b>	<b>13%</b>

Caregiver Adaptations	1 Occurrence	68	66	-2.9%
Assistive Devices	1 Occurrence	3	3	0%
<b>SUPPLEMENTAL TOTAL</b>	<b>1 Occurrence</b>	<b>71</b>	<b>69</b>	<b>-2.9%</b>
In-Home Supervision	1 Hour	522	471	-9.8%
Adult Day Care	1 Hour	667	556	-16.6%
<b>RESPIRE TOTAL</b>	<b>1 Hour</b>	<b>1,189</b>	<b>1,027</b>	<b>-13.6%</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

N/A

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

Due to the COVID-19 crisis, most service requests decreased in FY2021. Therefore, the Camarillo Health Care District proposed fewer respite services and requested more support services.

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>Conejo Valley Senior Concerns</b>		<b>15</b>
<b>Project:</b>	Family Caregiver Resource Center	<b>Funding:</b>	\$26,750
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input type="checkbox"/> Title IIIC1 <input type="checkbox"/> Title IIIC2 <input type="checkbox"/> Title IIID <input checked="" type="checkbox"/> Title IIIE <input type="checkbox"/> Title V <input type="checkbox"/> Title VII <input type="checkbox"/> OMB	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> Yes with Contingencies (see H) <input type="checkbox"/> Advisory Council Approval Required (see G) <input type="checkbox"/> No

**SUMMARY**

Senior Concerns' Family Caregiver Resource Center Program provides two NAPIS 1 (Support), two NAPIS 2 (Respite), and two NAPIS 3 (Supplemental) services in the community of Thousand Oaks and east Ventura region. Accompanying this program are Private Caregiver Consultation services; Library of information, education and resources; and Support Groups for caregivers. Due to the COVID-19 crisis, Respite Service requests have decreased, and Support Services have increased significantly compared to the FY1920. This program has served a total of 215 clients in Caregiver Support Groups, 15 clients in Caregiver Adaptations and Assistive Devices and a total of 28 year to date for In-Home Respite and Adult Day Care services.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted*	YTD Units Delivered	YTD % to Goal
Caregiver Assessment	1 Hour	127	136	107%
Caregiver Case Management	1 Hour	180	166	92%
Caregiver Support Groups	1 Hour	221	737	333%
<b>SUPPORT TOTAL</b>	<b>1 Hour</b>	<b>528</b>	<b>1,038</b>	<b>197%</b>
Caregiver Adaptations	1 Occurrence	26	26	100%
Assistive Devices	1 Occurrence	4	3	80%
<b>SUPPLEMENTAL TOTAL</b>	<b>1 Occurrence</b>	<b>30</b>	<b>29</b>	<b>97%</b>
In-Home Supervision	1 Hour	705	507.75	72%
Adult Day Care	1 Hour	0	0	0%
<b>RESPITE TOTAL</b>	<b>1 Hour</b>	<b>1271.25</b>	<b>846.50</b>	<b>72%</b>

\* OTO Contract Amendment effective 3/31/2021 through 6/30/2021: Caregiver Assessment service units increased from 89 to 169; Caregiver Case Management service units increased from 120 to 240; Caregiver Support Groups service units increased from 70 to 295; Caregiver Adaptations service units increased from 25 to 35 occurrences;; Respite – In-Home Supervision increased from 320 to 940 hours; Respite – Adult Day Care services decreased from 320 to 0 hours.

**B. Proposed Next Fiscal Year Contracted Service**



Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Caregiver Assessments	1 Hour	89	89	0%
Caregiver Case Management	1 Hour	120	120	0%
Caregiver Support Groups	1 Hour	70	70	0%
<b>SUPPORT TOTAL</b>	<b>1 Hour</b>	<b>279</b>	<b>279</b>	<b>0%</b>
Caregiver Adaptations	1 Occurrence	25	25	0%
Assistive Devices	1 Occurrence	5	5	0%
<b>SUPPLEMENTAL TOTAL</b>	<b>1 Occurrence</b>	<b>30</b>	<b>30</b>	<b>0%</b>
In-Home Supervision	1 Hour	320	320	0%
Adult Day Care	1 Hour	3200	320	0%
<b>RESPIRE TOTAL</b>	<b>1 Hour</b>	<b>640</b>	<b>640</b>	<b>0%</b>

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

N/A

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

N/A

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>Grey Law</b>	<b>Funding:</b>	<b>\$74,000</b>	<b>16</b>
<b>Project:</b>	Legal Services	<b>Contract Year:</b>	FY2021-2022	
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input checked="" type="checkbox"/> Title IIIB	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes	
	<input type="checkbox"/> Title IIIC1		<input type="checkbox"/> Yes with Contingencies (see H)	
	<input type="checkbox"/> Title IIIC2		<input type="checkbox"/> Advisory Council Approval Required (see G)	
	<input type="checkbox"/> Title IIID		<input type="checkbox"/> No	
	<input type="checkbox"/> Title IIIE			
	<input type="checkbox"/> Title V			
	<input checked="" type="checkbox"/> Title VIIb			
	<input checked="" type="checkbox"/> HICAP			

**SUMMARY**

On July 1, 2021, Grey Law will be celebrating its 42<sup>nd</sup> Anniversary of Service in Ventura County. The staff and volunteers of this nonprofit continue to navigate around the barriers the COVID-19 crisis has presented. Alternative means of service delivery have been offered to ensure clientele are able to continue seeking legal advice. Staff and volunteers work exceptionally hard to do as much as possible with the grant funding for this programming. It has been the sole source provider of Title III B Legal Assistance and Community Education for decades serving seniors residing in PSA 18 with outstanding contracted performance.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
<b>LEGAL SERVICES</b>				
Legal Assistance	1 hour	1,050	1,004	96%
Unduplicated Clients - Legal Assistance	1 client	600	898	150%
Community Education Topics	1 activity	6	3	42%
Unduplicated Clients - Community Ed	1 client	156	104	67%
Community Education Topics	Topic	Estate Planning/FRAUD/Changes in Medicare Law/VCCDC Homeownership/ Alzheimer's Program/LIFE		
<b>Elder Abuse Prevention, Education &amp; Training (FAST)</b>				
FAST	1 visit	6	18	300%
Unduplicated Clients - FAST Ed	1 visit	66	244	270.5%
FAST Topics Discussed/Presented	Topic	Elder Financial Abuse APS		
<b>HICAP Services</b>				
HICAP Legal	1 hour	18	17	150.0%
Unduplicated Clients - HICAP	1 client	6	18	333.3%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Requested	% Change
<b>LEGAL SERVICES</b>				
Legal Assistance	1 hour	1,400	1,400	0%
Unduplicated Clients - Legal Assistance	1 client	800	800	0%
Community Education Topics	1 activity	8	8	0%
Unduplicated Clients - Community Ed	1 client	208	208	0%
Community Education Topics	Topic	Estate Planning/FRAUD/Changes in Medicare Law/VCCDC Homeownership/ Alzheimers Program/LIFE		
<b>Elder Abuse Prevention, Education &amp; Training (FAST)</b>				
FAST	1 visit	8	8	0%
Unduplicated Clients - FAST Ed	1 visit	88	88	0%
FAST Topics Discussed/Presented	Topic	Elder Financial Abuse APS		
<b>HICAP Services</b>				
HICAP Legal	1 hour	24	24	0%
Unduplicated Clients - HICAP	1 client	8	8	0%

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why  
 No

**D. Regional Service Targeting**

Percentages of Clients Year to Date – July 1, 2020 thru March 31, 2021

Client Age	Total	%
60-64	98	11%
65-74	474	53%
75-84	261	29%
85+	65	7%

Client Sex at Birth	Total	%
Male	392	44%
Female	506	56%
Declined to State	0	0%

Client Gender	Total	%
Male	390	43%
Female	490	55%
Transgender Female to Male	15	1.7%

Transgender Male to Female	3	0.3%
Genderqueer/Gender Non-binary	0	0%
Not listed, please specify:	0	0%
Declined to State	0	0%

Client Sexual Orientation/Identity	Total	%
Straight/Heterosexual	877	97.7%
Bisexual	2	0.2%
Gay/Lesbian/Same-Gender Loving	19	2.1%
Questioning/Unsure	0	0%
Not listed, please specify:	0	0%
Declined to State	0	0%

Most in Need	Total	%
Frail/disabled	94	10.5%
Homebound	63	7.0%
Living alone	391	43.5%
Institutionalized	0	0.0%
Suspected Victim of Elder Abuse/Exploitation Hispanic/Latino	44	4.9%
Limited English	262	29.2%
Rural	303	33.7%
Greatest economic need, minority	167	18.6%
Greatest economic need, non-minority	314	35.0%
Greatest economic need, status unknown	4	0.4%
Hispanic/Latino	229	25.5%

Types of Cases	Total	%
Consumer/Finance (Contract/Warranties/Other)	164	18.3%
Health/Community Based Care (Medi-Cal/ Medicare/Other)	80	8.9%
Housing (Landlord-Tenant issues/Foreclosures/Other)	462	51.4%
Income Maintenance (Social Security/SSI/Pensions/Retiree Benefits/Other)	104	11.6%
Individual Rights (Immigration/Elder Abuse)	0	0.0%
Miscellaneous (Estate Planning/Wills/Trusts/Financial Powers of Attorney/Other)	88	9.8%

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>

Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

N/A

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>Long Term Care Services</b>		<b>17</b>
<b>Project:</b>	Preplacement Counseling for Family Caregivers	<b>Funding:</b>	\$27,624
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input type="checkbox"/> Title IIIB	<b>Contract Year:</b>	FY2021-2022
	<input type="checkbox"/> Title IIIC1	<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes
<input type="checkbox"/> Title IIIC2	<input type="checkbox"/> Yes with Contingencies (see H)		
<input type="checkbox"/> Title IIID	<input type="checkbox"/> Advisory Council Approval Required (see G)		
<input checked="" type="checkbox"/> Title IIIE	<input type="checkbox"/> No		
<input type="checkbox"/> Title V			
<input type="checkbox"/> Title VII			
<input type="checkbox"/> OMB			

**SUMMARY**

For 38 years Long Term Care Services has been providing knowledgeable and professional preplacement counseling services in Ventura County. With their ongoing community engagement and experience in the field, they are able to give caregivers the knowledge of available services they need to make the best decisions for their loved ones. Contracted performance is consistently exceptional.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
Caregiver Counseling (1 Hour)	1 hour	112.50	169.50	151%
Minimum # of Unduplicated Clients	1 client	105	109	104%

**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
Caregiver Counseling (1 Hour)	1 hour	150	150	0.0%
Minimum # of Unduplicated Clients	1 client	140	140	0.0%

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

N/A

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/> Has some deficiencies (see F) <input type="checkbox"/> Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

CDA approved the reduction in service units

**H. Contract Contingency Requirements**

N/A

<b>Grantee:</b>	<b>Long Term Care Services</b>			<b>18</b>
<b>Project:</b>	Ombudsman	<b>Funding:</b>	\$364,698	
<b>Funding Source:</b> <i>(Check all that apply)</i>	<input checked="" type="checkbox"/> Title IIIB (Fed) <input checked="" type="checkbox"/> Title VIIa (Fed) <input checked="" type="checkbox"/> Title IIIB (state) <input checked="" type="checkbox"/> LCPF (state) <input checked="" type="checkbox"/> SDFL (state) <input checked="" type="checkbox"/> SNF Q&A (state)	<b>Contract Year:</b>	FY2021-2022	
		<b>Renewal Recommendation:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> Yes with Contingencies (see H) <input type="checkbox"/> Advisory Council Approval Required (see G) <input type="checkbox"/> No	

**SUMMARY**

Long Term Care Services offers excellent professional service to clientele. The Federal mandate governing the Ombudsman program nationwide requires only one annual visit per facility; however, this provider has set its own mandate for Ventura County that stipulates all skilled nursing facilities would be monitored a minimum of once a week and all assisted living facilities a minimum of once a month. Unfortunately, due to the COVID-19 crisis, LTCS was not allowed into any facilities for nearly nine out of the past 12 months, which severely impacted its performance goals for FY1920 and FY2021. Although LTCS has been faced with many challenges over the past 12-months, its staff and volunteers continue to actively advocate for decent care and quality of life for more than 8,000 frail elderly in Ventura County’s 237 long term care facilities – 60% of whom have no family or friends to watch out or visit them and are too fearful, vulnerable or frail to represent themselves.

**A. Current Fiscal Year Contracted Service – Through March 31, 2021**

Service Category	Unit of Measure	YTD Units Contracted	YTD Units Delivered	YTD % to Goal
<b>OUTCOME 1</b>				
Complaint Resolution Resolved	% open complaints	99.7%	99.7%	100.3%
Work with Resident Councils	1 meeting attended	349	262	24
Consultation to Facilities	1 consultation	21	16	1
Info & Consult to Individuals	1 I&C	1,945	1,429	3,581
Community Education Sessions	1 session	5,287	3,965	3,725
<b>OUTCOME 2</b>				
Facility Coverage – Nursing Facilities (SNFs) visited quarterly	1 visit	100%	100%	115
Facility Coverage – Residential Care Facilities visited quarterly	1 visit	99%	99%	671
# of F/T Equivalent OMB Staff	1 volunteer	5.13	5.13	5
# of Certified LTC OMB Volunteers	1 ombudsman	60	60	49
<b>OUTCOME 3</b>				
Training Sessions on NORS	1 session	1		



**B. Proposed Next Fiscal Year Contracted Service**

Service Category	Unit of Measure	Current FY Contracted (Original)	Next FY Proposed	% Change
<b>OUTCOME 1</b>				
Complaint Resolution Resolved	% open complaints	99.7%	98.7%	-1%
Work with Resident Councils	1 meeting attended	349	250	-28.4%
Work with Family Councils	1 meeting attended	21	6	-71.4%
Consultation to Facilities	1 consultation	1,945	1,975	1.5%
Info & Consult to Individuals	1 I&C	5,287	4,600	-13%
Community Education Sessions	1 session	83	50	-39.6%
<b>OUTCOME 2</b>				
Facility Coverage – Nursing Facilities (SNFs) visited quarterly	1 visit	100%	100%	0.0%
Facility Coverage – Residential Care Facilities visited quarterly	1 visit	99%	100%	1%
# of F/T Equivalent OMB Staff	1 volunteer	5.13	4.63	-9.75%
# of Certified LTC OMB Volunteers	1 ombudsman	60	40	-33.3%
<b>OUTCOME 3</b>				
Training Sessions on NORS	1 session	1		

**C. Is the percentage change more than 10%?**

Full Advisory Council approval for original contracted service unit deviations of +/- 10%.

- Yes - Fill in Box G as to why
- No

**D. Regional Service Targeting**

N/A

**E. Other Evaluation Factors**

Service Delivery, Staffing and Organizational Capacity – Grantee demonstrates strong effort to deliver contracted service and has the staff and organizational capacity to continue to do so.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Budget and Fiscal – Grantee manages and monitors expenditures well and stays within budget and works with VCAAA staff if there’s a problem.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Reporting – Grantee submits accurate and timely fiscal and program reports, year-end closeouts and all other reports required by the VCAAA.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>
Data Entry – Grantee accurately enters all required information to the Q system in a timely manner.	Meets most or all requirements <input checked="" type="checkbox"/>
	Has some deficiencies (see F) <input type="checkbox"/>
	Has major deficiencies (see F) <input type="checkbox"/>

**F. Has grantee had a corrective action plan for underperformance this FY?**

N/A

**G. Concerns/Issues Regarding Contract**

Due to the present COVID-19 restrictions in place for nursing and residential care facilities, as well as the decline in volunteers, CDA approved the proposed reduction in service units for FY2122.

**H. Contract Contingency Requirements**

N/A

The purpose of this document is to provide an annual update to the Strategic Plan for FY 2020-2024, which was approved by the Ventura County Board of Supervisors in February 2021 and was later approved by the California Department of Aging. The delivery of programs and services in FY 2021-2022 is contingent upon the availability of funds from all sources (federal, State and County). The California Department of Aging has released funding estimates for FY 2021-2022. These estimates specify the funding source and dollar amount of federal and state funds to be available next fiscal year.

## WHO ARE WE?

The Ventura County Area Agency on Aging is the principal agency that addresses issues that relate to older adults, adults with disabilities, and their caregivers. In addition to providing a number of direct programs, we also develop, enhance and maintain community-based systems of care that provide services, which support independence and protects the quality of life of older persons and persons with functional impairments. We also promote citizen involvement in the planning and delivery of services for Ventura County's older population, adults with disabilities, and their caregivers. We accomplish these objectives through a network of education, advocacy, problem-solving, program planning and by utilizing a variety of sources of funding.

Our governing body is the Ventura County Board of Supervisors. They set the policy, determine funding and approve the strategic plan and its submission to the California Department of Aging. We also have a 39-member Advisory Council that determines programming, funding priorities, advocacy efforts and makes recommendations to the Board of Supervisors. The Advisory Council is made up of representatives from each city, Board of Supervisors representatives, service provider representatives, focused population representatives and members of the California Senior Legislature.

## WHOM DO WE SERVE?

We provide services to:

- Older adults age 60 years of age and older
- Persons with disabilities
- Unpaid caregivers

Services provided are dependent upon the funding requirements as well as program eligibility.

Our goal is to target our services to those in need and to make sure that our program participants mirror the composition of the community we serve. According to California Department of Aging the current total population of people over the age of 60 in Ventura County is 197,639, which is a decrease from 2020. Statewide there is a net loss of people aged 60 and over from 2020 to 2021.

Of these 197,639 individuals:

- 9,075 are non-English speakers
- 73,570 are minorities
- 17,195 have incomes below the federal poverty level
- 25,905 are Medi-Cal eligible
- 5,252 are geographically isolated
- 6,698 are aged 65 or older and SSI/SSP eligible
- 59,260 are older than 75
- 32,015 live alone

Our demographics are similar to the state averages but reflect a less diverse and slightly more affluent population.

Priority Categories	Ventura County N=197,639	State of California N=8,620,949
Minority 60+	37%	47%
Low income 60+	9%	13%
Medi-Cal eligible 60+	13%	21%
Geographic isolation 60+	3%	5%
SSI/SSP 65+	3%	7%
Population 75+	30%	31%
Lives alone 60+	16%	17%
Non-English speaking 60+	5%	5%

**OUR GOALS ARE SIMPLE**

1. Provide resources and services
2. Increase awareness of programs and services

We plan to accomplish these measurable goals in FY 2021-2022 through providing direct services as well as contracting with other community-based organizations. Our goals contain strategies to include opportunities for collaboration and capacity building as well as to identify and address emerging needs and issues of the population we serve. The projected start date for all activities is July 1, 2021 through June 30, 2022. No services being provided are funded by Title IIIB program development and coordination dollars.

OUR PRIORITIES

During a strategic planning session held by the Advisory Council in January 2018, the following programs and efforts have been identified as priority objectives that:

1. Help older adults maintain their independence and ability to live at home.
2. Protect older adults living in long-term care facilities.
3. Provide home-delivered meals.
4. Provide health insurance information and system navigation through unbiased counseling.
5. Provide evidence-based classes that help prevent falls.
6. Provide congregate meals.
7. Prevent abuse and protect the rights of older adults to include case management for those that have been abused.
8. Provide transportation.
9. Provide family caregiver with information and assistance about available resources.
10. Provide emergency food.
11. Communicate to the public who we are, the services we provide, and the resources available.

This means that although all the objectives listed below are important, as are the additional strategies and activities to be undertaken to meet these goals, additional efforts that may include staff time and resources will be focused on these priorities.

<b>Goal 1</b> Provide resources and services to older adults, adults with disabilities, and their unpaid caregivers that promote optimal well-being with an emphasis on wellness, safety and community livability.					
#	Category and narrative for Objective	# of service units	#of people served	Source of Funding	Update Status – New, Same, Decrease or Increase
1	Transportation – provide transportation to ensure older adults and persons with disabilities have access through accessible transportation to fully participate in the community.				
	For persons aged 60 and older, provide one-way trips to/from congregate meal sites	0	0	Title IIIB	Same
	Provide one-way trips for non-emergency medical appointments, shopping, etc.	3,000	3,500	Title IIIB VCTC	Same
2	Food and Nutrition – provide meals, supplemental food, nutrition counseling and education to ensure that older adults have access to nutritional meals, fresh fruits, and vegetables; as well as information to make healthy choices.				
	Congregate meals	100,842	3,000	Title IIIC1	Decrease
	Home-delivered meals	317,378	1,300	Title IIIC2	Same

**Strategic Plan Update for Fiscal Year 2021-2022**

	Provide emergency food to older adults experiencing a food emergency	1,000,000	4,800	Title IIIB, FEMA, CARES ACT Donations	Decrease
	Supplement the meal program by planting and harvesting fresh produce in VCAAA's Senior Nutrition Garden.	20,000 lbs. produce	900	County, SNAP ED,	Same
	Nutrition Counseling (sessions)	86	86	Title IIIC	Same
	Nutrition Education (sessions)	2,000	466	Title IIIC	Same
	Provide education and promote physical activity (classes)	173	112	SNAP-ED	Same
3	Health, Fitness and Fall Prevention – provide evidence-based physical fitness classes to promote health and prevent falls. Additional help will be made available to older adults who have already experienced a fall.				
	Short-term case management for individuals that have fallen. Referrals come from emergency response and emergency department staff for people 65+ in Ojai, Ventura, Oxnard, Port Hueneme and Camarillo	N/A	75	County	Increase
	Provide Evidence-Based Classes (Classes include: Tai Chi: Moving for Better Balance, Stepping On, A Matter of Balance and Walk with Ease (Arthritis Foundation)	1,800	300	Title IIID	Same
4	Family Caregiver Services – provide programs and services to assist unpaid, informal caregivers, including older adults (such as grandparents) aged 55 and older raising children aged 18 and younger (such as grandchildren).				
	Caring for older adults:				
	Access: information and assistance and caregiver outreach (contacts)	5,000	196	Title IIIE	Same
	Info services: public information activities and community education (events)	20	800,000	Title IIIE	Same
	Support services: caregiver assessment, case management, support groups, counseling, training, and counseling (hours)	1,693	300	Title IIIE	Same
	Respite services: in-home supervision and out-of-home day care (hours)	3,079	140	Title IIIE	Same
	Supplemental services: caregiver adaptations and assistive devices (occurrences)	182	86	Title IIIE	Same
	Caring for the children (grandparents raising grandchildren)				
	Access: information and assistance and caregiver outreach (contacts)	80	40	Title IIIE	Same

**Strategic Plan Update for Fiscal Year 2021-2022**

	Info services: public information activities and community education (events)	10	5,000	Title III E	Same
	Support services: caregiver assessment, case management, support groups and training (hours)	20	10	Title III E	Same
	Supplemental services	20	1	Title III E	Same
	Respite services – out of home	20	1	Title III E	Same
5	Maintaining Independence – Providing access to programs and services that foster independence and help older adults remain at home				
	Case management for older adults (hours)	1,250	220	Title III B	Same
	Long-term case management for other specialized populations	N/A	600	Medi-Cal, MHSA, ACL	Same
	Personal Care (hours)	709	25	Title III B	Same
	Disaster Preparedness	500	500	Title III B	Same
	Homemaker services (hours)	980	45	Title III B	Same
	Chore services (hours)	660	30	Title III B	Same
	Residential repairs/modifications	78	78	Title III B	Same
	Personal/home safety	24	20	Title III B	Same
	Material aid	2,200	2,200	Title III B	Same
	Mental Health Counseling	86	86	Title III B	Same
	Subsidized employment training through the Senior Community Services Employment Program (SCSEP)	N/A	4	Title V	Same
6	Socialization/Prevention of loneliness and isolation – providing services to reduce isolation and provide a human connection for older adults with few or no connections in the community, to alleviate depression and health concerns of those living alone and to provide a check in on older adults at-risk of losing their independence.				
	Peer counseling (hours)	700	616	Title III B	Same
	Telephone reassurance (contacts)	3,000	800	Title III B	Same
7	Prevention of Abuse and Protection of Rights of Older Adults – provide programs and services that protect the rights and property of older adults and protect them from abuse.				
	Legal assistance regarding public benefits, landlord-tenant disputes, housing rights, elder abuse, powers of attorney, consumer finance, and creditor harassment, and consumer fraud and warranties	1,400	800	Title III B	Same
	Community education events on rights and benefits	4	125	Title III B	Same
	Elder Abuse Case Management	100	25	DA/VOCA	Same
	Financial Abuse Specialist Team (FAST) to provide training to professionals	20	150	Title VI B	Same

**Strategic Plan Update for Fiscal Year 2021-2022**

	Provide Legal Information for Elders (“LIFE”) workshops for seniors.	2	40	Title VIIB	Same
	Ombudsman Program <sup>i</sup> will work to ensure the rights and well-being of individuals residing in long-term care facilities (skilled nursing facilities and board and care facilities) in Ventura County. Complaint resolution rate.	99.7%	N/A	Omb Title IIIB	Same
8.	Housing – connect people in need of housing with those willing to share their housing.				
	Referrals to other organizations for services	300	N/A	COV	Same
	Matching home seekers with home providers	40	40	COV	Decrease
	Match introduction – refer home seekers to home providers	100	N/A	COV	Decrease
<p>Strategies to support the goal and objectives under this category:</p> <ol style="list-style-type: none"> <li>1. Advocate for affordable housing for older adults and connecting housing and transportation in developing long-range planning around housing.</li> <li>2. Maintain VCAAA webpage related to transportation options</li> <li>3. Continue attendance on the Citizens Transportation Advisory Committee to advocate for the transportation needs of older adults and persons with disabilities.</li> <li>4. Explore the use of alternate transportation modes such as driverless cars, and Uber advance at senior centers</li> <li>5. Advocate for the development of strategies and collaborations that will ensure services and safe living options for homeless seniors in Ventura County, including veterans, and adults with disabilities.</li> <li>6. Advocate for and develop strategies to address housing and transportation issues that impact older adults and persons with disabilities and examine other factors that contribute creating livable communities.</li> <li>7. Encourage the creation of a multi-generational housing incorporating universal design.</li> <li>8. Continue to advocate for the employment, training and job placement needs of older adults through participation on the Workforce Development Board and with the Advisory Council Workforce Committee</li> <li>9. Collaborate with public agencies and other stakeholders on a strategy for disaster planning and health emergencies</li> <li>10. Continue leadership of Dementia Friendly Ventura County which includes developing strategies to generate awareness, identify and engage key stakeholders, and develop a long-range action plan to identify and address issues relevant to Ventura County residents.</li> <li>11. Continue participation on the Elderly Fall Prevention Coalition</li> <li>12. Collaborate with community-based organizations, including the Ventura County Hospital to Home Alliance, to advocate for mental health and substance abuse programs that serve older adults (aged 60+); and for staff training in geriatrics.</li> <li>13. Investigate developing a volunteer program for retired social workers to increase the reach in the community for those in need of case management.</li> </ol>					

<b>Goal 2</b> Increase awareness of programs and needs that support Ventura County’s older adults, adults with disabilities, and their unpaid caregivers to include providing tools, classes and assistance with enrollment.					
#	Category and Narrative for Objective	# of service units	#of people served	Source of Funding	Update Status –



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					New, Same, Decrease or Increase
1	Information and Resources – provide easy, uniform and streamlined access to a broad array of services, supports and advocacy for older adults, adults with disabilities and their family caregivers.				
	Provide Information, assistance and referrals to include following up.	30,000	10,000	Title IIIB	Same
	Provide outreach – one on one contact and/or virtual contact to connect to services at 50 events	40,000	N/A	Title IIIIB	Same
	Provide Medicare enrollment assistance including assistance with Medicare Part D comparisons through the Health Insurance Counseling and Advocacy Program	4,037	2,399	HICAP	Same
	Provide benefit enrollment assistance in public programs	2,000	450	HICAP NCOA ADRC	Same
Strategies to support the goal and objectives under this category:					
<ol style="list-style-type: none"> <li>1. Continue to monitor the growth of the non-English speaking communities and develop resource materials to serve those individuals as needed. This includes working with community-based organizations to revise and update an inventory of service providers who speak and provide services in languages other than English in FY 2020-2024.</li> <li>2. Continue participation on the LGBT Aging Coalition, which is under the auspices of VCAAA, and work with older adults who identify as being Lesbian Gay Bisexual Transgender (LGBT) to increase awareness of the unique needs of LGBT seniors, including but not limited to residents in long-term care facilities.</li> <li>3. Continue to manage the Aging and Disability Resource Network, which consists of community-based service providers who represent the interests of older adults and persons with disabilities in Ventura County. This includes working with Aging and Disability Resource Network members to identify service gaps, community awareness of the needs, coordination and integration of services, create opportunities for collaborations and problem sharing.</li> <li>4. Promote optimal aging by adding a link to optimal aging information, continuing the optimal aging awards and pursuing funding for other projects such as photo and story contests.</li> <li>5. Increase outreach related to VCAAA services and programs.</li> </ol>					

**2021 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 2016, Section 314(c)(1).

## Strategic Plan Update for Fiscal Year 2021-2022

Fiscal Year	Date	Location	Number of Attendees	Presented in Languages Other Than English?	Held at Long-Term Care Facility?
2020-2021	8/17/2020	Via Zoom	6	No	No
2021-2022	4/19/2021	Via zoom	TBD	No	No
2022-2023					
2023-2024					

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 disabled older individuals.  
 Notice of the public hearing published in the Ventura Star, the newspaper with the largest circulation in Ventura County, on the VCAAA website and through targeted emails. The legal notice and emails included instructions on how to submit written testimony (as well as how to testify at the public hearing).
2. Were proposed expenditures for Program Development (PD) and Coordination (C) discussed?
  - Yes. Go to question #3
  - Not applicable, PD and C funds will not be used. Go to question #4
3. Summarize the comments received concerning proposed expenditures for PD and C.  
 Not applicable.
4. Attendees were provided the opportunity to testify regarding setting of minimum percentages of Title III-B program funds to meet the adequate proportion funding for Priority Services.
  - Yes. Go to question #5
  - No, Explain:
5. Summarize the comments received concerning minimum percentages of Title III B funds to meet the adequate proportion funding for priority services.  
 No comments received regarding the Title III B minimum percentages.
6. List any other issues discussed or raised at the public hearing.  
 The need for additional case management by trained social workers and the potential development of a volunteer programs for retired social workers was discussed.
7. Note any changes to the Area Plan which were a result of input by attendees.  
 No changes were made.

### SERVICE UNIT PLAN OBJECTIVES

#### TITLE III/VI/A SERVICE UNIT PLAN OBJECTIVES

## Strategic Plan Update for Fiscal Year 2021-2022

### 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 \(NORS\) Instruction](#)

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
2020-2021	709	1	5
2021-2022	709	1	5
2022-2023			
2023-2024			

#### Homemaker (In-Home)

#### Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	980	1	5
2021-2022	980	1	5
2022-2023			
2023-2024			

#### Chore (In-Home)

#### Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	660	1	5
2021-2022	660	1	5
2022-2023			
2023-2024			

#### Home-Delivered Meal

#### Unit of Service = 1 meal

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	2,892,378	1	2
2021-2022	317,378	1	2
2022-2023			
2023-2024			

#### Case Management (Access)

#### Unit of Service = 1 hour

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	1,250	1	5
2021-2022	1,250	1	5
2022-2023			

**Strategic Plan Update for Fiscal Year 2021-2022**

2023-2024			
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**Congregate Meals**

**Unit of Service = 1 meal**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	381,842	1	2
2021-2022	100,842	1	2
2022-2023			
2023-2024			

**Nutrition Counseling**

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

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	86	1	2
2021-2022	86	1	2
2022-2023			
2023-2024			

**Transportation (Access)**

**Unit of Service = 1 one-way trip**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	3,000	1	1
2021-2022	3,000	1	1
2022-2023			
2023-2024			

**Legal Assistance**

**Unit of Service = 1 hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	1,400	1	7
2021-2022	1,400	1	7
2022-2023			
2023-2024			

**Nutrition Education**

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

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

**Information and Assistance (Access)**

**Unit of Service = 1 contact**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	30,000	2	1
2021-2022	30,000	2	1
2022-2023			
2023-2024			

**Outreach (Access)**

**Unit of Service = 1 contact**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	40,000	2	1
2021-2022	40,000	2	1
2022-2023			
2023-2024			

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

- Each **Title III B** “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 III B** services to be funded that were not reported in NAPIS categories. (Identify the specific activity under the Other Supportive Service Category on the “Units of Service” line when applicable.)

**Title III B, Other Priority and Non-Priority Supportive Services**

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

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

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

**NAPIS Service Category – “Other” Title III Services**

**Service Category: Cash/Material Aid**

**Unit of Service = 1 assistance**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	2,200	1	5
2021-2022	2,200	1	5
2022-2023			
2023-2024			

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**Service Category: Peer Counseling**

**Unit of Service = 1 hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	700	1	6
2021-2022	700	1	6
2022-2023			
2023-2024			

**Service Category: Personal/Home Security**

**Unit of Service = 1**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	24	1	5
2021-2022	24	1	5
2022-2023			
2023-2024			

**Service Category: Residential Repairs/Modifications**

**Unit of Service = 1**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	78	1	5
2021-2022	78	1	5
2022-2023			
2023-2024			

**Service Category: Telephone Reassurance**

**Unit of Service = 1 contact**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	3,000	1	6
2021-2022	3,000	1	6
2022-2023			
2023-2024			

**Service Category: Mental Health**

**Unit of Service = 1 hour**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	86	1	5
2021-2022			
2022-2023			
2023-2024			

**Service Category: Disaster Preparedness**

**Unit of Service = 1 product**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	500	1	5
2021-2022			
2022-2023			
2023-2024			

**3. Title IIID/ Disease Prevention and Health Promotion**

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

**Unit of Service = 1 contact**

**Service Activities:** *Tai Chi: Moving for Better Balance™ (TCMBB), Stepping On, A Matter of Balance, Walk with Ease (Arthritis Foundation), Enchance@Fitness*

**Service Category: Evidence-Based Health Promotion** **Unit of Service = 1 contact**

Fiscal Year	Proposed Units of Service	Goal Numbers	Objective Numbers
2020-2021	1,800	1	3
2021-2022	1,800	1	3
2022-2023			
2023-2024			

**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 481 + number of partially resolved complaints 97 divided by the total number of complaints received 584 = Baseline Resolution Rate 99.7% FY 2020-2021 Target Resolution Rate 99.7%
2. FY 2019-2020 Baseline Resolution Rate: 100% Number of complaints partially or fully resolved 348 divided by the total number of complaints received 348 = Baseline Resolution Rate 100% FY 2021-2022 Target Resolution Rate: 97.7%
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: 1.7

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

1. FY 2018-2019 Baseline: Number of Resident Council meetings attended = 349 FY 2020-2021 Target: 349
2. FY 2019-2020 Baseline: Number of Resident Council meetings attended = 294 FY 2021-2022 Target: 200
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: 1.7

**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: 21
2. FY 2019-2020 Baseline: Number of Family Council meetings attended: 6 FY 2021-2022 Target: 5
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: 1.7
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**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: 1945 FY 2020-2021 Target: 1945
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2. FY 2019-2020 Baseline: Number of Instances: 3756 FY 2021-2022 Target: 3500
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3. FY 2020-2021 Baseline: Number of Instances FY 2022-2023 Target:
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4. FY 2021-2022 Baseline: Number of Instances FY 2023-2024 Target:
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Program Goals and Objective Numbers: 1.7
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**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: 5287 FY 2020-2021 Target: 5,287
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2. FY 2019-2020 Baseline: Number of Instances: 5804 FY 2021-2022 Target: 5500
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3. FY 2020-2021 Baseline: Number of Instances FY 2022-2023 Target:
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4. FY 2021-2022 Baseline: Number of Instances FY 2023-2024 Target:
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Program Goals and Objective Numbers: 1.7
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**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: 83 FY 2020-2021 Target: 83
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2. FY 2019-2020 Baseline: Number of Sessions: 103 FY 2021-2022 Target: 75
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3. FY 2020-2021 Baseline: Number of Sessions FY 2022-2023 Target:
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4. FY 2021-2022 Baseline: Number of Sessions FY 2023-2024 Target:
Program Goals and Objective Numbers: 1.7

**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.

<b>FY 2020-2021</b>
<b>FY 2020-2021 Systems Advocacy Effort(s):</b> (Provide one or more new systems advocacy efforts). Pre pandemic, the following goal was established as required by CDA. Long Term Care Services of Ventura County (Ombudsman) will expand efforts in working with families of residents to encourage them to work together in forming Family Councils. By law, facilities must provide a place for Family Councils to meet and must advertise the council. Long Term Care Services will create marketing materials for families and facilities to aid them in forming the councils and will provide technical support in their formation. Families are not required to form a council, but our plan is to help create a best practices council that can be used as a model for other facilities. Long Term Care Services will provide training to staff and volunteers in the creation and formation of effective councils.
<b>FY 2021-2022</b>

**Outcome of FY 2020-2021 Efforts:** Due to the COVID-19 pandemic, the systems advocacy effort was put on hold. The same proposed effort for FY 2020-2021 will be carried over for FY 2021-2022.

**FY 2021-2022 Systems Advocacy Effort(s):** (Provide one or more new systems advocacy efforts). Long Term Care Services of Ventura County (Ombudsman) will expand efforts in working with families of residents to encourage them to work together in forming Family Councils. By law, facilities must provide a place for Family Councils to meet and must advertise the council. Long Term Care Services will create marketing materials for families and facilities to aid them in forming the councils and will provide technical support in their formation. Families are not required to form a council, but our plan is to help create a best practices council that can be used as a model for other facilities. Long Term Care Services will provide training to staff and volunteers in the creation and formation of effective councils.

**FY 2022-2023**

**Outcome of FY 2021-2022 Efforts:**

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

**FY 2023-2024**

**Outcome of 2022-2023 Efforts:**

**FY 2023-2024 Systems Advocacy Effort(s):** (Provide one or more new systems advocacy efforts)

**Outcome 2. Residents have regular access to an Ombudsman. [(Older Americans Act Reauthorization Act of 2016), Section 712(a)(3)(D), (5)(B)(ii)]**

**Measures and Targets:**

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

1. FY 2018-2019 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint 19 divided by the total number of Nursing Facilities 19 = Baseline 100%  
FY 2020-2021 Target: 100%

2. FY 2019-2020 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint divided by the total number of Nursing Facilities = Baseline 0%  
FY 2021-2022 Target: 100%

3. FY 2020-2021 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint divided by the total number of Nursing Facilities = Baseline % FY 2022-2023 Target: %
4. FY 2021-2022 Baseline: Number of Nursing Facilities visited at least once a quarter not in response to a complaint divided by the total number of Nursing Facilities = Baseline % FY 2023-2024 Target: %
Program Goals and Objective Numbers: 1.7

**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 210 divided by the total number of RCFEs 212 = Baseline 99% FY 2020-2021 Target: 99%
2. FY 2019-2020 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint divided by the total number of RCFEs 222 = Baseline % FY 2021-2022 Target: 100%
3. FY 2020-2021 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint divided by the total number of RCFEs = Baseline % FY 2022-2023 Target: %
4. FY 2021-2022 Baseline: Number of RCFEs visited at least once a quarter not in response to a complaint divided by the total number of RCFEs = Baseline % FY 2023-2024 Target: %
Program Goals and Objective Numbers: 1.7

**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: 5.13 FTEs FY 2020-2021 Target: 5.13 FTEs
2. FY 2019-2020 Baseline: 4.63 FTEs FY 2021-2022 Target: 4.63 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: 1.7

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

1. FY 2018-2019 Baseline: Number of certified LTC Ombudsman volunteers 60 FY 2020-2021 Projected Number of certified LTC Ombudsman volunteers 60
2. FY 2019-2020 Baseline: Number of certified LTC Ombudsman volunteers: 44 FY 2021-2022 Projected Number of certified LTC Ombudsman volunteers: 40
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: 1.7

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

**Measures and Targets:**

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

Some examples could include:

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

FY 2020-2021 - Ombudsman program staff and volunteers will attend, as needed, appropriate training on accuracy, consistency, and timeliness of the reporting of data pertinent to the Ombudsman program.

FY 2021-2022 - Ombudsman program staff and volunteers will attend, as needed, appropriate training on accuracy, consistency, and timeliness of the reporting of data pertinent to the Ombudsman program

**TITLE VIIA ELDER ABUSE PREVENTION SERVICE UNIT PLAN OBJECTIVES**

The agency receiving Title VIIA Elder Abuse Prevention funding is: Grey Law of Ventura County

Fiscal Year	Total # of Public Education Sessions
2020-2021	2
2021-2022	2
2022-2023	
2023-2024	

Fiscal Year	Total # of Training Sessions for Professionals
2020-2021	8
2021-2022	8
2022-2023	
2023-2024	

Fiscal Year	Total # of Training Sessions for Caregivers served by Title III E
2020-2021	0
2021-2022	0
2022-2023	
2023-2024	

Fiscal Year	Total # of Hours Spent Developing a Coordinated System
2020-2021	0
2021-2022	0
2022-2023	
2023-2024	

Fiscal Year	Total # of Copies of Educational Materials to be Distributed	Description of Educational Materials
2020-2021	40	40 Legal Information for Elders (LIFE) guides will be distributed
2021-2022	40	40 Legal Information for Elders (LIFE) guides will be distributed
2022-2023		
2023-2024		

Fiscal Year	Total Number of Individuals Served
2020-2021	40
2021-2022	40
2022-2023	
2023-2024	

**TITLE III E SERVICE UNIT PLAN OBJECTIVES**

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

This Service Unit Plan (SUP) uses the five broad federally mandated service categories. Refer

**Strategic Plan Update for Fiscal Year 2021-2022**

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**

<b>CATEGORIES</b>	<b>1</b>	<b>2</b>	<b>3</b>
<b>Family Caregiver Services Caring for Elderly</b>	<b>Proposed Units of Service</b>	<b>Required Goal #(s)</b>	<b>Optional Objective #(s)</b>
<b>Information Services</b>	<b># of activities and Total est. audience for above</b>		
<b>2020-2021</b>	# of activities: 20 Total est. audience for above: 800,000	1	4
<b>2021-2022</b>	# of activities: 20 Total est. audience for above: 800,000	1	4
<b>2022-2023</b>	# of activities: Total est. audience for above:		
<b>2023-2024</b>	# of activities: Total est. audience for above:		
<b>Access Assistance</b>	<b>Total contacts</b>		
<b>2020-2021</b>	5,000	1	4
<b>2021-2022</b>	5,000	1	4
<b>2022-2023</b>			
<b>2023-2024</b>			
<b>Support Services</b>	<b>Total hours</b>		
<b>2020-2021</b>	1,693	1	4
<b>2021-2022</b>	1,693	1	4
<b>2022-2023</b>			
<b>2023-2024</b>			
<b>Respite Care</b>	<b>Total hours</b>		
<b>2020-2021</b>	3,079	1	4
<b>2021-2022</b>	3,079	1	4
<b>2022-2023</b>			
<b>2023-2024</b>			
<b>Supplemental Services</b>	<b>Total occurrences</b>		
<b>2020-2021</b>	182	1	4
<b>2021-2022</b>	182	1	4
<b>2022-2023</b>			
<b>2023-2024</b>			

**Direct and/or Contracted III E Services**

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<b>Grandparent Services Caring for Children</b>	<b>Proposed Units of Service</b>	<b>Required Goal #(s)</b>	<b>Optional Objective #(s)</b>
<b>Information Services</b>	<b># of activities and Total est. audience for above</b>		
<b>2020-2021</b>	# of activities: 10 Total est. audience for above: 5,000	1	4
<b>2021-2022</b>	# of activities: 10 Total est. audience for above: 5,000	1	4
<b>2022-2023</b>	# of activities: Total est. audience for above:		
<b>2023-2024</b>	# of activities: Total est. audience for above:		

<b>Grandparent Services Caring for Children</b>	<b>Proposed Units of Service</b>	<b>Required Goal #(s)</b>	<b>Optional Objective #(s)</b>
<b>Access Assistance</b>	<b>Total contacts</b>		
<b>2020-2021</b>	80	1	4
<b>2021-2022</b>	80	1	4
<b>2022-2023</b>			
<b>2023-2024</b>			
<b>Support Services</b>	<b>Total hours</b>		
<b>2020-2021</b>	20	1	4
<b>2021-2022</b>	20	1	4
<b>2022-2023</b>			
<b>2023-2024</b>			
<b>Respite Care</b>	<b>Total hours</b>		
<b>2020-2021</b>	20	1	4
<b>2021-2022</b>	20	1	4
<b>2022-2023</b>			
<b>2023-2024</b>			
<b>Supplemental Services</b>	<b>Total occurrences</b>		
<b>2020-2021</b>	20	1	4
<b>2021-2022</b>	20	1	4
<b>2022-2023</b>			
<b>2023-2024</b>			

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



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

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

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

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

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

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

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

**HICAP Legal Services Units of Service (if applicable)<sup>1</sup>**

<b>Fiscal Year (FY)</b>	<b>3.1 Estimated Number of Clients Represented Per FY (Unit of Service)</b>	<b>Goal Numbers</b>
<b>2020-2021</b>	8	2
<b>2021-2022</b>	8	
<b>2022-2023</b>		
<b>2023-2024</b>		

<b>Fiscal Year (FY)</b>	<b>3.2 Estimated Number of Legal Representation Hours Per FY (Unit of Service)</b>	<b>Goal Numbers</b>
<b>2020-2021</b>	3	2
<b>2021-2022</b>	3	
<b>2022-2023</b>		
<b>2023-2024</b>		

<b>Fiscal Year (FY)</b>	<b>3.3 Estimated Number of Program Consultation Hours Per FY (Unit of Service)</b>	<b>Goal Numbers</b>
<b>2020-2021</b>	3	2
<b>2021-2022</b>	3	
<b>2022-2023</b>		
<b>2023-2024</b>		

**LEGAL ASSISTANCE**

**2020-2024 Four-Year Area Planning Cycle**

This section must be completed and submitted annually. The Older Americans Act Reauthorization Act of 2016 designates legal assistance as a priority service under Title III B [42 USC §3026(a)(2)]<sup>2</sup> CDA developed *California Statewide Guidelines for Legal Assistance*

<sup>1</sup> Requires a contract for using HICAP funds to pay for HICAP Legal Services.

<sup>2</sup> For Information related to Legal Services, contact Chisorom Okwuosa at 916 419-7500 or [chisorom.okwuosa@aging.ca.gov](mailto:chisorom.okwuosa@aging.ca.gov)

(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](https://aging.ca.gov/Providers_and_Partners/Legal_Services/#pp-gg)

1. Specific to Legal Services, what is your AAA's Mission Statement or Purpose Statement? Statement must include Title IIIB requirements: **Discuss:** The VCAAA's Legal Services mission is: To ensure justice, dignity, health, security, maximum autonomy and independence to older Californians by protecting and enforcing the legal rights of individuals and by promoting social change through broad elder rights advocacy. The purpose of the Legal Services Program is to deliver quality, cost-effective services designed to address the unmet legal needs of vulnerable Ventura County seniors.
2. Based on your local needs assessment, what percentage of Title IIIB funding is allocated to Legal Services? **Discuss:** At a minimum, 5% of Title IIIB funding.
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:** The local needs have remained the same over the past four years. Funding for legal services is extremely limited. LSP would like to be able to setup a litigation fund for low-income seniors.
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 contract between AAA and the LSP specifies that LSPs are expected to use the California Statewide Guidelines. Said guidelines are "Exhibit C" of the contract.
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, at a minimum, the LSP and AAA annually review together the LSP's service priorities with the LSP providing critical input. The top four priority legal issues in PSA 18 are:
  - Consumer: debt and collections, harassment by creditors and consumer fraud
  - Abuse/Neglect/Exploitation: elder abuse/exploitation cases, financial abuse
  - Planning/Personal Autonomy: advance directives, powers of attorney
  - Housing: reverse mortgage foreclosures, landlord disputes, predatory lending
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, Discuss:**

The populations targeted to receive legal services in PSA 18 are seniors aged 60 and older who:

- Are the most frail and vulnerable seniors (such as individuals aged 85 and over)
- Are in the greatest social and economic need
- Are homebound, socially isolated, or living alone with no support
- Are experiencing physical and financial abuse
- Are experiencing chronic health problems, mental or physical disabilities (including deaf, hearing-impaired and blind seniors), and caregivers of these populations; and
- Have limited regarding English skills

Mechanisms for reaching these populations include, but are not limited to:

- Working with the AAA and its Aging and Disability Resource Center (ADRC) to keep abreast of needs, statistics, and new and ongoing opportunities for outreach (such as to LGBT seniors)
- Participating in the development of the AAA’s Master Strategic Plan (Area Plan) and annual updates
- Distributing LSP’s brochures in English and Spanish at senior centers, public speaking events, and outreach event
- Utilizing public service announcements (PSAs)
- Encouraging word-of-mouth among seniors to advertise the program
- Legal services are advertised in newsletters and press releases, including those published by local senior/community centers (focal points)
- LSPs website
- Working/communicating with allied service providers including but not limited to the long-term care Ombudsman, the local Bar Association, Adult Protective Services, Superior Court’s Self-Help Center, local senior centers and community centers, AAAs Senior Network, local law enforcement, the FBI, the three family caregiver centers that receive Title III-E funds from the AAA (including the newer center that targets monolingual-Spanish speakers), and the Independent Learning Resource Center.

7. Specific to Legal Services, what is the targeted senior population and mechanism for reaching targeted groups in your PSA? **Discuss:** Please Note that this is a duplicate of Question #6. For answers, please review to Question #6 above.

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

Fiscal Year	# of Legal Assistance Services Providers
<b>2020-2021</b>	1

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<b>2021-2022</b>	1
<b>2022-2023</b>	Leave Blank until 2022
<b>2023-2024</b>	Leave Blank until 2023

9. Does your PSA have a hotline for legal services? **Yes/No, Discuss:** No. We do not have the funding to pay for an additional legal service.

10. What methods of outreach are Legal Services providers using? **Discuss:** Outreach campaigns are conducted throughout the year via the news media (print and broadcast), regular presentations to nonprofit community-based organizations (e.g., hospice groups, etc.), community fairs, and regularly scheduled days each month at senior centers. This is continually being expanded to reach individuals isolated due to language or cultural barriers. Working with the AAA and its Aging and Disability Resource Center (ADRC) to keep abreast of needs, statistics and new and ongoing opportunities for outreach (such as to LGBT seniors). Distributing LSP’s brochures in English and Spanish at senior centers, public speaking events, and outreach event. Public service announcements. Encouraging word-of-mouth among seniors to advertise the program. Legal services are advertised in newsletters and press releases, including those published by local senior/community centers (focal points). LSP’s website. Working/ communicating with maintaining positive relationships with the long-term care Ombudsman, the local Bar Association, Adult Protective Services, Superior Court’s Self-Help Center, local senior centers and community centers, local law enforcement, the FBI, the three family caregiver centers that receive Title III-E funds from the AAA (including the newer center that targets monolingual-Spanish speakers), and the Independent Learning Resource Center and making sure availability of services is known among the entire aging services network in PSA 18.

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

<b>Fiscal Year</b>	<b>Name of Provider</b>	<b>Geographic Region covered</b>
<b>2020-2021</b>	Grey Law of Ventura, Inc.	Entire County
<b>2021-2022</b>	Grey Law of Ventura, Inc	Entire County
<b>2022-2023</b>	Leave Blank until 2022	Leave Blank until 2022
<b>2023-2024</b>	Leave Blank until 2023	Leave Blank until 2023

12. Discuss how older adults access Legal Services in your PSA: **Discuss:** Older adults access legal services by calling to schedule an appointment at the provider’s office or the local senior center. Seniors must be Ventura County residents aged 60 years and older.

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): **Discuss:** Credit card debt has been and continues to be a major legal problem for many older adults. They can carry the debt when they are working and when they cannot work anymore (due to retirement or illness, etc.), they are unable to pay off their debt. Consumer debt has completely overtaken all other areas of legal services and represents over one-third of Grey Law's annual senior consultations and volunteer hours. Other major issues and/or new trends include reverse mortgage issues, elder abuse, health care directives, decision-making choices, durable power of attorney, Social Security, Medicare, Medi-Cal, nursing homes, and consumer fraud.

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? **Yes/No, Discuss:** The types of legal issues remain consistent.

15. What are the barriers to accessing legal assistance in your PSA? Include proposed strategies for overcoming such barriers. **Discuss:** Barriers to access include (1) people wanting more legal representation than what funding can provide; (2) language and cultural barriers, which can cause seniors not to seek services; and (3) lack of transportation to and from the sites where services are provided. This problem has improved over the past few years as more seniors learn about transportation resources. Strategies for overcoming these barriers include the need for increased funding from the Older Americans Act to provide legal services; continued recruitment and retention of more volunteers (who must be attorneys or law students); working with local churches to identify and reach non-mainstream seniors who could benefit from legal services, and volunteers who would be willing to provide transportation to/from appointments.

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

The LSP coordinates services with these organizations:

- Adult Protective Services (County of Ventura)
- Alzheimer's Association, Central Coast Chapter
- California Rural Legal Assistance, Inc.
- Community Action of Ventura County
- Conejo Valley Senior Concerns
- Financial Abuse Specialist Team (FAST)
- Health Insurance Counseling and Advocacy Program (HICAP) (County of Ventura)
- Jewish Family Services regarding family law
- Legal Access Clinic at the Courts
- Ombudsman (Long Term Care Services of Ventura County, Inc.)
- Senior Hotline ("211")
- Ventura County Area Agency on Aging
- Veterans Services Office (County of Ventura)

