



CA 2030: FUTURE-READYING THE CALIFORNIA AGING NETWORK

Webinar #4: Statewide Services & Performance Measures

May 29th, 2025

1. Refresher and Outlook
2. Statewide Services
 - Nutrition Services
 - Caregiving Services
 - Information & Assistance
3. Monitoring Outlook
4. Next Steps (Feedback Survey)
5. Q&A and Dialogue

PURPOSE OF TODAY'S WEBINAR

Share details about new and renewed performance measures for Nutrition, Caregiver, and Information and Assistance (I&A) services; future changes and considerations to Information & Assistance (I&A); and setting expectations for future monitoring and performance management by CDA.

1. Refresher & Outlook

2023-2024 AAA ENGAGEMENT



ENGAGEMENT & FEEDBACK OPPORTUNITIES

- **Webinar 1: CA 2030 Update & Outlook** | March 26th
- **Webinar 2: Funding Formula Development** | April 22nd
 - *IFF Calculator Tool Distribution and Feedback (Responses due May 30th!)*
- **Webinar 3: PSA and AAA Designation Criteria** | May 2nd
 - *Designation Criteria and Processes Feedback (Responses due June 13th!)*
- **Webinar 4: Statewide Services and Performance Measures** | **Today**
 - *Performance Measures and I&A Service Descriptions Feedback*
- **Webinar 5: CA 2030 Implementation Plan** | August 18th, 11:00 am – 12:30 pm PT

WHY FOCUS ON STATEWIDE SERVICES & PERFORMANCE?



- **Consistency:** Establish and improve baseline service delivery statewide.
- **Quality:** Strengthen and measure the quality of the most common and essential AAA services.
- **Equity:** Ensure programs and services are reaching those most in need.
- **Efficacy:** Demonstrate impact and improve outcomes of programs and services.
- **Compliance:** Incorporate updated federal and state statutes and regulations.

Most Commonly Offered Programs and Services by AAAs and Title III Funding Source (% of all AAAs).

IIIB	<ul style="list-style-type: none"> • Information & Assistance (97%) & Outreach (58%) • Legal Assistance (94%)
IIIC	<ul style="list-style-type: none"> • Congregate and Home-Delivered Meals (100%) • Nutrition Education (94%)
IIID	<ul style="list-style-type: none"> • Evidence-based Health Promotion (91%)
IIIE	<ul style="list-style-type: none"> • Caregiver Respite Care (97%) • Caregiver Support Services (97%)

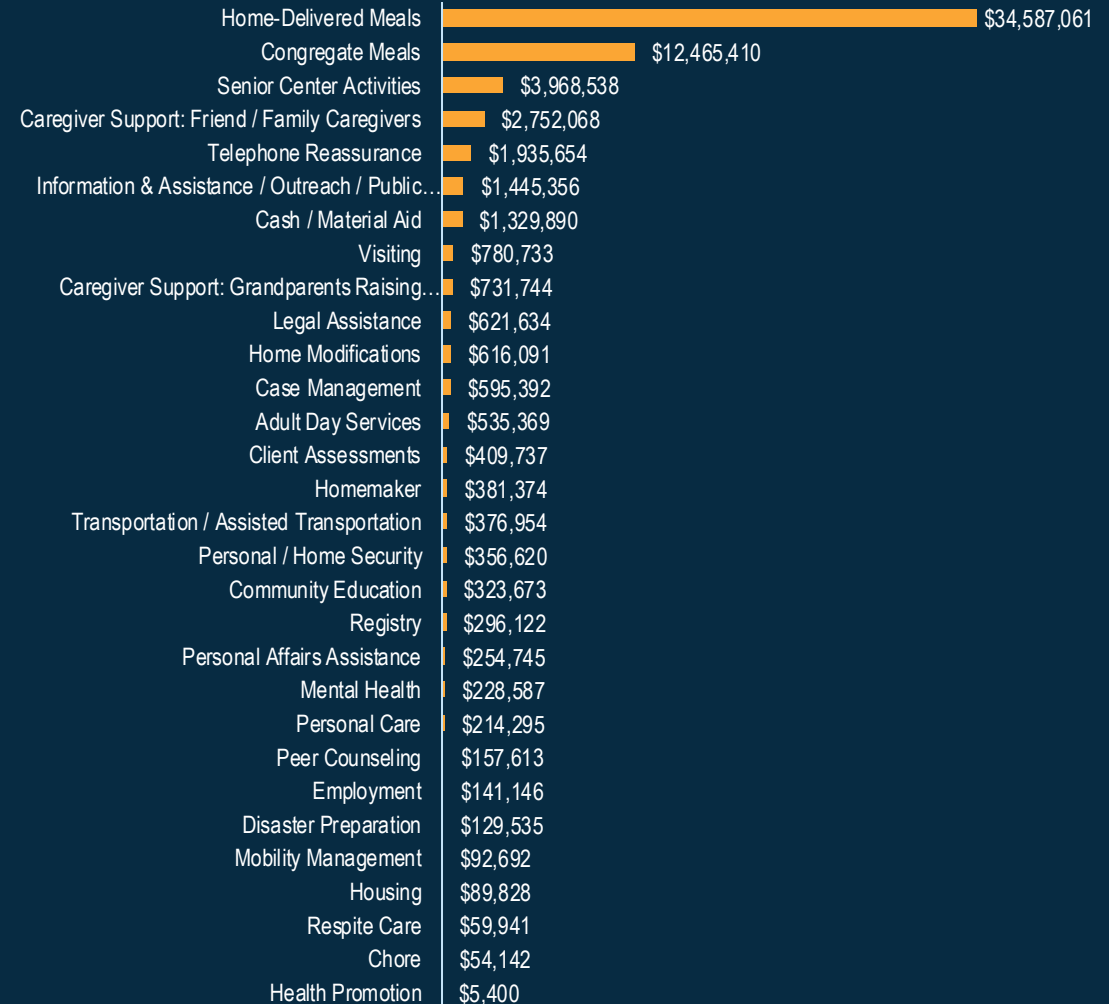
Source: CDA CARS Data, 2018-19

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Total Service Expenditures (2021)



2. STATEWIDE SERVICES

First Round (2025-26)

Nutrition Services

Caregiver Services

Basic Information & Assistance

Second Round (2027-28)

Enhanced Information & Assistance

Legal Assistance

In-Home Services

Evidence-based Health Promotion

PROPOSED PERFORMANCE MEASURES



PERFORMANCE MEASURE	FOCUS AREA	MEASURE TYPE	ALREADY COLLECTED & REPORTED?
Timely reporting.	Admin & Operations	Process	Collected
Unspent funds.	Fiscal	Process	Collected
Cost per unit of service.	Fiscal	Process	Collected
Funding reallocations to and from IIIC.	Fiscal	Process	Collected
Projected vs actual service volume for the year.	Service Delivery	Process	Collected
Number of prepared meals provided in a group setting.	Service Delivery	Output	Collected & Reported
Number of registered congregate meal consumers.	Service Delivery	Output	Collected & Reported
Number of home-delivered meals provided.	Service Delivery	Output	Collected & Reported
Number of registered home-delivered meal consumers.	Service Delivery	Output	Collected & Reported
Number of unduplicated clients served.	Service Delivery	Output	Collected & Reported
Number of meal sites offering culturally tailored meals.	Service Delivery	Output	No
Ability to spend 90% or more of allocated funds.	Fiscal	Output	Collected
High-needs population targeting performance.	Demographics	Output	Collected
Geographic gaps in services (via zip code).	Demographics	Outcome	Collected

PROPOSED PERFORMANCE MEASURES

PERFORMANCE MEASURE	FOCUS AREA	MEASURE TYPE	ALREADY COLLECTED & REPORTED?
Timely reporting.	Admin & Operations	Process	Collected
Unspent funds.	Fiscal	Process	Collected
Cost per unit of service.	Fiscal	Process	Collected
Number of clients and units delivered for the following caregiver services: Counseling, Support Groups, Training, Respite, Supplemental Services, Case Management, and I&A.	Service Delivery	Output	Collected & Reported
Number of unduplicated caregiver clients served, by caregiver service category.	Service Delivery	Output	Collected & Reported
Number of clients by zip code.	Demographics	Output	Collected
Ability to spend 90% or more of allocated funds.	Fiscal	Output	Collected
Racial/ethnic identity of caregiver and care recipient.	Demographics	Output	Collected
Age of caregiver and care recipients.	Demographics	Output	Collected
Gender of caregiver and care recipient.	Demographics	Output	Collected
Relationship of caregiver and care recipient.	Demographics	Output	Collected

“Basic Information & Assistance”

- **Answers:** Answering questions from the public, which may include providing referrals to related aging programs, services, and providers.
- **Resource Directories:** Developing and/or linking to printed and online resource directories that list aging programs, services, and providers.
- **Follow-up:** Following up with I&A clients as needed.
- **Branding & Publicity:** Adoption of a common language and/or branding of statewide I&A services and infrastructure. Publicizing availability of I&A services and resource directory of local aging programs, services, and providers.

“Enhanced Information & Assistance”

- **Needs Assessments:** Conducting consumer needs assessments to understand the unique circumstances, preferences, and goals of clients in order to connect them with the most appropriate and effective supports and information.
- **Person-centered Options Counseling:** A facilitative, in-depth, and individualized decision-support process where trained volunteers and/or professionals actively listen to and understand a client’s unique values, preferences, goals, and circumstances, to help them explore, understand, and make informed choices about the full range of long-term services and supports (LTSS) that align with their self-defined quality of life, regardless of age, disability, or income.
- **Proactive Follow-up:** A systematic process where trained volunteers and/or professionals proactively re-engage with clients after initial information, options counseling, or service connections have been made.
- **Warm Referrals:** Managing warm referrals to services, programs, and providers. (e.g. MOUs, protocols, agreements with other providers / programs to cross-refer and confirm referral of individuals)

PROPOSED PERFORMANCE MEASURES

PERFORMANCE MEASURE	FOCUS AREA	MEASURE TYPE	ALREADY COLLECTED & REPORTED?
Number of public outreach activities.	Marketing & Outreach	Process	No
Consumer confirms they received information and assistance.	Service Delivery	Process	No
Provision of I&A staff training.	Admin & Operations	Process	No
Number of referrals made, by specific service type and category.	Service Delivery	Output	No
Number of duplicated and unduplicated clients served.	Service Delivery	Output	Collected & Reported
Number of calls, emails, and walk-ins.	Service Delivery	Output	No
High-needs population targeting performance.	Demographics	Outcome	No

3. OUTLOOK

Policies & Procedures

- Identify and draft needed regulation updates (per ACL Final Rule and SB1249).
- Review, update, and develop administrative and programmatic guidance based on updated regulations and monitoring practices.

Performance Management

- Strengthen and enforce performance improvement plans for underperformers.
- Explore performance incentives for high and low performers
- Publicize performance to provide transparency and illustrate effective use of funds and best practices.

Timing

- Collect and report baseline measures in FY26.
- Progressively establish performance monitoring and enforcement practices by beginning of FY27.

4. NEXT STEPS

4. Next Steps

FEEDBACK

- Collaborative Consulting will email an online survey link to each AAA director by the end of the day on **Thursday, May 29th**.
- The survey will ask for your suggestions, questions and/or concerns regarding existing and proposed I&A regulations and proposed performance measures for I&A, Nutrition, and Caregiver services.
- If you have not received the survey via email by **Monday, June 2nd**, please email [**alison@collaborativeconsulting.net**](mailto:alison@collaborativeconsulting.net) and request it.
- **Submit your survey responses by Friday, June 27th**.
- Feel free to organize and submit responses how you see fit - individually or in groups.
- CDA will review feedback as it drafts updates to I&A regulations and establishes future performance measures and performance monitoring practices and reporting.

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- **CA 2030 Webinars and Publications (2024):** <https://www.aging.ca.gov/CA2030/>
- **State Statutes & Regulations**
 - PSA/AAA Designations ([CCR](#)) ([OCA](#))
 - State Funding Formula ([OCA](#)) ([Area Plan Allocation Methodology](#))
 - Statewide Programs & Services ([CCR](#)) ([OCA](#))
- **Federal Statutes & Regulations:**
 - [Current Older Americans Act \(OAA\)](#)
 - [OAA Reauthorization Bill](#)
 - [ACL Final Rule](#)

Questions or comments? Use this email address:

CA2030@aging.ca.gov

Q&A



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