



CA 2030: FUTURE-READYING THE CALIFORNIA AGING NETWORK

Webinar #3: PSA and AAA Designations

May 2nd, 2025

1. OPEN AND WEBINAR PURPOSE

PURPOSE OF TODAY'S WEBINAR

Share details about future changes to the AAA and PSA designation criteria.

AGENDA

1. Open and Webinar Purpose
2. Refresher and Outlook
3. Areas of Focus and Decision-making
 1. PSA Designations Criteria and Processes
 2. AAA Designations Criteria and Processes
4. Next Steps
5. Q&A and Dialogue

2023-2024 AAA ENGAGEMENT



ENGAGEMENT & FEEDBACK OPPORTUNITIES

- **Webinar 1: CA 2030 Update & Outlook** | March 26, 12:00 pm – 1:30 pm PT
- **Webinar 2: Funding Formula Development** | April 22, 12:00 – 1:00 pm PT
 - *IFF Calculator Tool Distribution and Feedback*
- **Webinar 3: PSA and AAA Designation Criteria** | Today
 - *Designation Criteria and Processes Feedback*
- **Webinar 4: Statewide Services and Performance Measures** | May 29, 12:00 pm – 1:00 pm PT
 - *Performance Measures Feedback*
- **Webinar 5: CA 2030 Implementation Plan** | August 18, 11:00 am – 12:30 pm PT

WHY UPDATE PSA & AAA DESIGNATION CRITERIA?

- California has seen dramatic population changes in recent years.
- Results from the California 2030 surveys and stakeholder interviews indicated a need and opportunity to explore if the PSA designations (boundaries) and AAA designation criteria are adequate.
- Recent state and federal statutes updates require CDA to revise and align its regulations.
- Existing designation regulations are too broad, and more clarity is needed for fair processes and appropriate designations.

PSA & AAA DESIGNATION CRITERIA AND PROCESSES

The proposed draft PSA and AAA designation criteria and processes are based on 2024 feedback from AAAs via webinars, a C4A session, three surveys, and input from the CDA staff.

CURRENT CRITERIA USED TO INFORM PSA DETERMINATIONS:

1. As determined from statistics provided by the Department of Finance Census Tables:
 - A. The geographical distribution of older individuals in the State.
 - B. The distribution of older individuals who have the greatest economic need.
 - C. The distribution of older individuals who have the greatest social need.
 - D. The distribution of older individuals who are Native Americans.
2. As determined by the needs assessment conducted by the AAAs as part of the area planning process:
 - A. The unmet need for supportive services, including multipurpose senior centers and legal assistance, and nutrition services.
 - B. The boundaries of existing areas within the State which are drawn for the planning or administration of the services specified in A.
 - C. The location of units of general purpose local government within the State.
3. Any other relevant factors.

PSA DESIGNATION CRITERIA

PROPOSED ADDITIONAL PSA CRITERIA TO USE:

1. Whether access to a proposed service delivery system is feasible within the natural geographic formations and transportation corridors which exist in the proposed PSA.
2. Existence of an adequate provider network to provide services to individuals in all areas of the new region.
3. Total population of 100,000 or more.

CURRENT PSA APPLICATION PROCESS:

1. Applicants submit a written request to the CDA Director.
2. CDA must hold a public hearing before approving or denying the application (if the applicant's proposed PSA has a general population of 100,000 or more).
3. CDA must act within 90 days of receiving a complete application to either deny the application, notify of intent to grant the application, or request additional information.
4. If PSA boundaries change, existing AAAs will continue providing services until new AAAs are designated and funded. CDA may delay final designation until at least one AAA is selected per new PSA to avoid service disruptions.
5. Applicants denied PSA designation may request a hearing.

PSA DESIGNATION PROCESS

PROPOSED PSA APPLICATION PROCESS CHANGES:

1. Future PSAs will need to have a general population of 100,000 or greater. Existing PSAs will be grandfathered in. Special exceptions will be considered based on specific criteria.
2. Any future PSA designation changes will only occur as a result of successful future applications from qualifying entities.
3. CDA will use the current state and federal statutory and regulatory requirements as well as any new adopted designation criteria to review PSA designation applications, including for instances where competing applications may exist.
4. CDA will accept and review PSA designation applications once every four years, 18 months prior to the beginning of the next state planning year.

AAA DESIGNATION CRITERIA

CURRENT & PROPOSED DOMAINS OF AAA CRITERIA:

1. Financial Capabilities
2. Organizational Structure
3. Facility
4. Staffing Sufficiency
5. Assurances
6. Visibility
7. Autonomy

FINANCIAL CAPABILITIES

Current Guidance: The proposal (application) documentation shall include but not be limited to:
“Financial records demonstrating the capability to provide programs for older individuals.” (22 CCR § 7206(e)(1))

New Proposed Criteria and Supporting Documentation:

- Financial Health
- Internal Controls
- Financial Acumen

PROPOSED FINANCIAL CAPABILITIES DOCUMENTATION

Financial Health

- Financial Statements.
- Annual Budgets.
- Funding Agreements.
- Fiscal Audit and Monitoring Findings.

Financial Acumen

- Listing of current federal and state grants, audits, and contracts.
- Evidence of strong fiscal monitoring compliance.
- Published and easily accessible financial records.
- Transparent budgeting, accurate reporting, and timely invoicing.
- Provide proof of System for Award Management (SAM) registration.
- Ability to remit payments to vendors / subcontractors / grantees within 30 days of receipt of an invoice.

Internal Controls

- Ability to track funding streams separately and ensure budget monitoring.
- Adherence to Generally Accepted Accounting Principles (GAAP) standards.
- Established fiscal and program policies, internal controls, and capacity to handle key activities.
- Reconciliation of accounting records to the closeout report for each funding stream.
- Subrecipient contract resolution, verification of expenditures.
- Ability to manage/oversee service delivery via contracted service providers including local direct services providers.
- Ability to award critical contracts timely (e.g. within 60 days).
- Ability to provide all required services to all PSA counties/areas.
- Ability to establish an AAA transitional plan, should AAA services transition to a new provider.
- Ability to blend and braid public and private funding sources.

ORGANIZATIONAL STRUCTURE

Current Guidance: The proposal (application) documentation shall include but not be limited to: “A description of the organizational structure demonstrating the ability to manage programs for older individuals.” (22 CCR § 7206 (e)(2))

New Proposed Criteria and Supporting Documentation:

- Engaged Board
- Organization Resources

PROPOSED ORGANIZATIONAL STRUCTURE DOCUMENTATION

Engaged Board

- A defined, active, and goal-driven governing board or County Board of Supervisors in overseeing the AAA's operations.
- Board members with demonstrated interest in or experience with aging programs.
- Duty description for Board chairperson and members that includes education and experience.

Organizational Resources

- An organizational chart with minimum staffing requirements.
- Access to legal services to advise on contracts, funding, conflicts, and other administrative program-related issues.
- An organizational succession plan that defines how critical AAA functions and services would be covered.
- No conflicts of interest that may hinder ability to advocate for or serve older adults.

FACILITY

Current Guidance: The proposal (application) documentation shall include but not be limited to:
“A physical description of the facility demonstrating all of the following:

- Accessibility to older individuals with disabilities.
- Space sufficient to accommodate the numbers of older individuals who will be utilizing the facility's programs.
- Convenience and central location to the population that will be served.” (22 CCR § 7206 (e)(3)(A)(B)(C))

New Proposed Criteria (to replace bullet #3 above):

- Service locations that are conveniently located near the populations served, whether the services are provided directly by the proposed AAA or through contracted providers.

STAFFING SUFFICIENCY

Current Guidance: The proposal (application) documentation shall include but not be limited to: “A description of the number and qualifications of the staff demonstrating that the staff is adequate in number and trained to administer programs for older individuals and to comply with 45 CFR 1321.55.”

(22 CCR § 7206 (e)(4))

New Proposed Criteria and Supporting Documentation:

- Staffing and Roles
- Hiring, Training, and Development

PROPOSED STAFFING SUFFICIENCY DOCUMENTATION

Staffing and Roles

- Sufficient management staff and qualifications to oversee the staff of the organization.
- Sufficient staff to meet programmatic needs.
- Staff and managers with demonstrated education and experience in critical AAA activities.
- Organization chart for the current organization and a proposed organization chart for the AAA with management and staff roles with full-time equivalent staffing percentages defined.
- Demonstrated commitment and plan to effectively and strategically use volunteers to augment staff.

Hiring, Training, and Development

- Clear job descriptions and hiring criteria for Executive Director, Deputy Director, Fiscal Officer, Planner, and other qualified staff relevant to the operations of a AAA.
- A detailed and structured training plan, relevant to the jobs needed to operate a AAA.
- Certifications and training programs for AAA staff.
- Professional development opportunities.

ASSURANCES

Current Guidance: The proposal (application) documentation shall include additional information to demonstrate the entity has: “The ability to meet all of the assurances required by federal law.”

(22 CCR 7206 (e)(5)(A))

New Proposed Criteria (to replace above):

- The ability to meet all of the assurances required by state and federal law and regulations.

VISIBILITY

Current Guidance: The proposal (application) documentation shall include but not be limited to: “Additional information to demonstrate that the entity has the visibility to be recognized for its leadership role by the residents in the PSA.” (22 CCR 7206 (e)(5)(B))

New Proposed Criteria and Supporting Documentation:

- Public Awareness and Access
- Partnerships and Collaborations
- Transparency
- Leadership

PROPOSED VISIBILITY DOCUMENTATION

Public Awareness and Access

- Easy-to-find points of entry (by recognizable phone, email, and web-based access points).
- Materials published in the most commonly spoken languages in the PSA region.
- Easily navigable and accessible website.

Partnerships and Collaborations

- Relationships with county services (e.g., indicated in the org chart via dotted lines).
- Constructive partnerships/relationships with social service providers and community-based organizations.
- Participation in public presentations, boards and councils, and community events.
- Constructive relationships with contracted service providers with an appropriate level of oversight and accountability.

Transparency

- Published plans such as operational, emergency, community engagement, and marketing plans.
- Data to support local accomplishments (number of meals served, cost per meal, etc.)

Leadership

- Demonstrated ability to be an integral part of the local aging, disability and family caregiver networks.
- Willingness and ability to advocate on behalf of older adults, adults with disabilities, and family caregivers.
- Demonstrated understanding of and ability to provide a broad array of social, supportive, educational, and nutritional services.
- Letters of support from public and private parties recognizing the entity as an aging planning and advocacy leader.

AUTONOMY

Current Guidance: The proposal (application) documentation shall include but not be limited to: “Additional information to demonstrate that the entity has an organizational level of autonomy that permits it to impact programs affecting older individuals in the PSA and to carry out its planning and advocacy functions.” (22 CCR § 7206 (e)(5)(C))

New Proposed Criteria and Supporting Documentation:

- Funding Flexibilities
- Governance Independence
- Planning Authority

PROPOSED AUTONOMY DOCUMENTATION

Funding Flexibilities

- Examples of ability to adjust funding and local programming to address community needs.

Governance Independence

- Engagement in nonpartisan planning, advocacy, and policy development.
- A level of executive decision-making independence to fulfill the goals and objectives of the AAA.

Planning Authority

- Efficient decision-making and responses to community concerns and a history of seeking opportunities for organizational growth and advancement to benefit consumers.
- Independent planning, advocacy, and policy development.
- Ability to provide public testimony and advocate for older adults and the systems that support them.
- Membership in advocacy organizations focused on advancing the well-being of older adults, adults with disabilities and/or family caregivers.

CURRENT AAA APPLICATION PROCESS:

1. When a AAA designation is needed, CDA first offers the designation to a unit of general-purpose local government whose boundaries align with the PSA. If declined, CDA may designate a public or private nonprofit organization.
2. At least 30 days before the application opens, CDA notifies local governments and nonprofit agencies in the PSA of its intent to designate a new AAA.
3. Interested entities then have 60 days to submit a detailed proposal.
4. During the 60-day window, CDA solicits local government input and conducts a public hearing for community feedback.
5. CDA selects the applicant who best meets federal requirements, considering public and local government input.
6. Applicants denied AAA designation may request a hearing.

PROPOSED AAA APPLICATION PROCESS:

1. Existing AAAs will not need to re-apply for AAA designation status after AAA designation criteria is updated. CDA will incorporate the updated criteria in its routine monitoring activities.
2. CDA will use the current state and federal statutory and regulatory requirements as well as any new adopted designation criteria to review AAA designation applications, including for instances where competing applications may exist.
3. Allow eligible entities can submit applications for AAA designation without a PSA boundary change.
4. CDA will accept and review PSA designation applications once every four years, 18 months prior to the beginning of the next state planning year.

4. NEXT STEPS

- Collaborative Consulting will email an online survey link to each AAA director by the end of the day on **Friday, May 2nd**.
- The survey will ask for your suggestions, questions and/or concerns regarding existing and proposed PSA and AAA designation criteria and processes.
- If you have not received the survey via email by **Monday, May 5th**, please email alison@collaborativeconsulting.net and request it.
- **Submit your survey responses by Friday, June 13th** .
- Feel free to organize and submit responses how you see fit - individually or in groups.
- CDA will review feedback as it develops the future PSA and AAA designation criteria and processes.

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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:

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Q&A



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