

Introduction

CDA is updating Statewide Services and would like your input on draft performance measures for three service areas: Information and Assistance (I&A), Nutrition, and Caregiver Services. We also seek your feedback on improving practices, tools, and infrastructure related to Information and Assistance (I&A) throughout the state. Your input will help inform CDA as we design, update, and implement changes to policies and practices in these areas.

If you have any questions, please contact alison@collaborativeconsulting.net.

Please submit your survey responses by Friday, June 27th.

[Click here](#) to access a PDF version of the survey.

Performance Measures

The following five principles are guiding CDA in developing and strengthening performance measurement, monitoring, and management:

- **Consistency:** Establish and improve baseline service delivery statewide.
- **Quality:** Strengthen and measure the quality of 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.

The performance measures below have been identified based on programmatic research, engagement with key stakeholders (including through AAA surveys), and opportunities to use existing data requirements and collection practices.

INFORMATION & ASSISTANCE

1A. Please select up to five Information & Assistance performance measures that can best demonstrate programmatic and administrative performance and impact of AAAs and their partners.

- Number of public outreach activities (marketing & outreach process measure)
- Consumer confirms they received information and assistance (service delivery process measure)
- Provision of I&A staff training (admin & operations process measure)
- Number of referrals made, by service type and category (service delivery output measure)
- Number of duplicated and unduplicated clients served (service delivery output measure)

- Number of calls, emails, and walk-ins (service delivery output measure)
- High-needs population targeting performance (demographics outcome measure)

1B. How do you and/or your subcontracted service providers collect I&A service data that is reported to CDA?

- On paper
- Digitally outside of CARS
- Digitally directly into CARS
- Other (Comments)

Comments

NUTRITION SERVICES

2A. Please select up to five Nutrition Services performance measures that can best demonstrate programmatic and administrative performance and impact of AAAs and their partners.

- Timely reporting (admin & operations process measure)
- Unspent funds (fiscal process measure)
- Cost per unit of service (fiscal process measure)
- Funding reallocations to and from IICC (fiscal process measure)
- Projected vs actual service volume for the year (service delivery process measure)
- Number of prepared meals provided in a congregate setting (service delivery output measure)
- Number of registered congregate meal consumers (service delivery output measure)
- Number of home-delivered meals provided (service delivery output measure)
- Number of registered home-delivered meal consumers (service delivery output measure)
- Number of unduplicated clients served (service delivery output measure)
- Number of meal sites offering culturally tailored meals (service delivery output measure)
- High-needs population targeting performance (demographics outcome measure)
- Geographic gaps in services (via zip code) (demographics outcome measure)

2B. How do you and/or your subcontracted service providers collect nutrition service data that is reported to CDA?

- On paper
- Digitally outside of CARS

- Digitally directly into CARS
- Other (Comments)

Comments

CAREGIVER SERVICES

3A. Please select up to five Caregiver Services performance measures that can best demonstrate programmatic and administrative performance and impact of AAAs and their partners.

- Timely reporting (Admin & Operations Process Measure)
- Unspent funds (Fiscal Process Measure)
- Cost per unit of service (Fiscal Process Measure)
- 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 Measure)
- Number of unduplicated caregiver clients served, by caregiver service category (Service Delivery Output Measure)
- Number of clients by zip code (Demographics Output Measure)
- Ability to spend 90% or more of allocated funds (Fiscal Output Measure)
- Racial/ethnic identity of caregiver and care recipient (Demographics Output Measure)
- Age of caregiver and care recipients (Demographics Output Measure)
- Gender of caregiver and care recipient (Demographics Output Measure)
- Relationship of caregiver and care recipient (Demographics Output Measure)

3B. How do you and/or your subcontracted service providers collect caregiver service data that is reported to CDA?

- On paper
- Digitally outside of CARS
- Digitally directly into CARS
- Other (Comments)

Comments

Statewide Information & Assistance

Navigating and accessing aging and caregiver resources is a significant reported challenge among many Californians. Based on the 2023 Community Assessment Survey of Older Adults (over 17,000 older Californians), 30% of older Californians rate the availability of information about resources for older adults positively. This number drops among lower-income individuals and racial and ethnic minorities. Information and Assistance (I&A) is the public's gateway to services, and should be a widely available, easy-to-access, consistent service across the state.

CDA is seeking to strengthen I&A statewide, to ensure all Californians have a basic minimum level of access to this service and to fundamental I&A infrastructure (service and provider directories). CDA is exploring updating I&A state regulations, strengthening monitoring and enforcement, and offering more support and technical assistance so California's aging network can promise Californians that someone is available to answer their questions and direct them to resources.

Defining Information & Assistance

CDA is updating state I&A policies and practices, which include I&A definitions and descriptions. CDA is proposing two levels of I&A: Basic and Enhanced. Please see the working descriptions below and share your suggestions, ideas, and/or concerns about these I&A levels and potential sub-services in the comment boxes provided.

4. Please indicate which sub-services below should be included within Basic Information & Assistance. Select all that apply.

- 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.
- Other (please specify)

5. Please indicate which sub-services below should be included within Enhanced Information & Assistance. Select all that apply.

- 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 listens to and understands 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, to: 1. Verify that services have been successfully accessed and are meeting their needs; 2. Identify any emerging challenges, unmet needs, or changes in circumstances; 3. Provide additional information, resources, or advocacy as required; 4. Ensure continued satisfaction and optimal outcomes.
- 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)

Clarifying Resource Directory Expectations

Current state regulations require that all AAAs maintain and update a “resource fle”. CDA wants to understand how engaged AAAs are in resource fle and directory management. Please indicate your activities relating to the following areas:

6. Does your AAA have a printed or downloadable resource directory?

7. Would your AAA consider using an online searchable statewide resource directory as your primary directory for local aging resources, if one were to exist?

I&A Operations

There is variation in I&A across the state. The following questions seek to better understand this variation and gain your perspectives on future naming conventions for I&A specialists.

8. Does your AAA outsource its resource call center / I&A activities?

9. Does your AAA have an I&A service manual or something similar?

10. Does your AAA capture any of the following call center / I&A data? Select all that apply.

- Number of calls received for I&A
- Length of I&A calls

- Number of emails received I&A
- Number of in-person visits for I&A
- Demographics of I&A clients
- Follow-up with I&A clients
- Satisfaction of I&A clients
- Other (please specify)

11. Does your AAA and/or funded partners experience capacity challenges regarding I&A services and activities? Select all that apply.

- Answering the phone for public inquiries during normal business hours (M-F 8am–5pm)
- Responding to voice messages within one business day
- Responding to email inquiries within one business day
- Assisting walk-in I&A clients
- Updating a resource directory
- Offering more than basic I&A services
- Measuring the quality and consistency of I&A services
- Monitoring the quality and consistency of I&A services
- Managing the quality and consistency of I&A services
- Other (please specify)

12. Do you have any suggestions for what I&A experts within the aging network could be called in the future? Select all that apply.

- Aging & Wellness Consultant
- Aging Resource Navigator
- Aging Solutions Specialist
- Community Aging Liaison
- Information & Assistance Specialist
- Senior Support Specialist
- Other (please specify)



13. In a 2024 survey, AAAs expressed support for the following ways CDA can encourage administrative and programmatic performance in the future:

- Monetary Incentives (n=16)
- Recognition and Visibility (n=12)
- Reduced Administrative Burden for High Performers (n=4)

Do you recommend any other ways you think AAAs should be rewarded and recognized for high performance?

14. How should CDA consider establishing penalties/sanctions on AAAs that demonstrate ongoing poor administrative and/or programmatic performance?

Other Comments

15. Please share any additional suggestions and questions about performance measures and/or updates to Information & Assistance services, rules, and expectations.

Survey Respondent

Please share the name and PSA number of the AAA submitting this form. If multiple AAAs are submitting together, please identify all represented. *

