



California Elder and Disability Justice Coordinating Council

June 18, 2025 | 10:00 a.m. – 1:00 p.m.



Welcome & Meeting Logistics



Carroll De Andreis

Manager, MPA Stakeholder Engagement

California Department of Aging



Webinar or Telephone only

- Live captioning and American Sign Language (ASL) interpreting streamed through webinar (Zoom).
- Meeting slides, transcript, and recording will be posted to [California Health and Human Services \(CalHHS\) Master Plan for Aging](#) webpage.
- Council members - please update your name display in Zoom by right clicking the upper right corner of your video and selecting "rename".

Virtual Meeting Operations

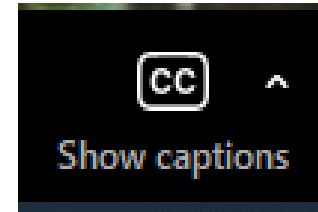


- The chat function is only enabled for Council Members, California Department of Aging (CDA) and state staff and invited guests to share meeting-related resources and information. The public will be able to view content shared in the chat during the meeting.
- The chat and the Question/Answer functions are not enabled for comments and questions from public attendees.
- We invite the public to provide comments. Please hold comments until the end of the meeting during the designated Public Comment period.
- Additional public comments and questions can be directed to Engage@aging.ca.gov.

Meeting Accessibility



- **American Sign Language (ASL)** interpreting is provided.
- **Closed captioning** is available during this meeting.
- To initiate closed captioning (cc):
 1. Click the CC icon on the Zoom toolbar.
 2. Click "Show captions" to display spoken meeting content as text.
 3. Click "View full transcript" to review previous caption text.
- If the CC icon does not appear on your toolbar, select "More," then select "Captions" and begin at Step 1 above.



Public Comment



Attendees joining by **phone**, *press* *9 on your dial pad to join line. The moderator will announce the last 4 digits of your phone number and will unmute your line.



Attendees joining by **webinar (Zoom)**, *click* the raise hand button to join line. The moderator will announce your name or your last 4 digits of your phone number and will unmute your line.

Note: Public commentators will have 2 minutes.

For additional public comment, email Engage@aging.ca.gov.

Council Purpose, Equity Guiding Principles, and Agenda



Ranjana Maharaj

*Elder Justice Specialist, Division of Policy, Equity, and
Engagement (DPRE)*

California Department of Aging

Council Purpose



The goal of the Elder and Disability Justice Coordinating Council (EDJCC) is to increase coordination and develop recommendations to prevent and address the abuse, neglect, exploitation, and fraud perpetrated against older adults and adults with disabilities.

Equity Guiding Principles



We recognize that past, current interventions, and services to prevent mistreatment have had negative consequences for some victims, families, and communities as the result of systemic discrimination and biases. To counter these negative impacts and to ensure equity and inclusion moving forward, we are committed to letting the following principles guide all aspects of our work in planning, coordination, and program development.

CalHHS Guiding Principles and Strategic Priorities

Equity Guiding Principles *cont.*



1. We recognize that all adults deserve to live free from abuse, neglect, and exploitation.
2. We acknowledge the existence of systemic racism, discrimination and negative impacts. In order to combat its impacts, we must center equity at all stages of our council's work.
3. Centering around equity does not just mean creating equitable solutions for all older adults and adults living with disabilities but also recognizing that implicit bias exists within all of us. We are committed as a group to acknowledge and explore biases while doing the work of this council.

Equity Guiding Principles *cont.*



4. We acknowledge that while older adults and adults living with disabilities have many overlapping interests, they are distinct communities, and any policies that are observed or recommended by this council should examine impacts to each community.
5. We recognize the importance of hearing directly from older adults and adults living with disabilities, their lived experiences should always be centered as we move forward with the work of this council.

EDJCC Council Members (2025)



EDJCC Co-Chairs

Susan DeMarois, *Director, CA Department of Aging*

Bertha S. Hayden, *Associate Vice President Justice for Seniors & Dependent Adults, Bet Tzedek*

Council Members

Tony Anderson, *Association of Regional Care Agencies*

Akiles Ceron, *San Francisco Human Services Agency*

Leza Coleman, *California Commission on Aging*

Sherry Johnson-Alvarez, *Advocate*

Daniel Kroos, *San Francisco Police Department*

Jaime Levine, *Elder Law and Advocacy*

Liz Logsdon, *Disability Rights California*

**EDJCC
Council
Members
(2025)
*cont.***



Sandra Longnecker, *Riverside County District
Attorney's Office*

Vivianne Mbaku, *Justice in Aging*

Jennifer Moore-Ballentine, *Coalition for Compassionate Care
of California*

Alicia Morales, *Adult and Long-Term Care Division
of Santa Cruz*

Lisa Nerenberg, *California Elder Justice Coalition (Retired)*

Carla Perissinotto M.D., *University of California San
Francisco*

Tim Perry, *California Commission on Aging*

Jamie Jenson PhD, *California Commission on Aging*

EDJCC Council Members (2025) *cont.*



Scott Pirrello, *San Diego District Attorney's Office*

Renita Polk, *County Welfare Directors
Association of California*

Eden Rosales, *Interim State Long-Term Care Ombudsman*

Tom Scott, *CA State Association of Public Administrators,
Public Guardians, and Public Conservators*

Jason Sullivan-Halpern, J.D., *CA Long-Term Care
Ombudsman Association*

Janie Whiteford, *California In Home Support Services
Consumer Alliance*

EDJCC Stakeholder Committee Member Biographies

Meeting Agenda



- 10:00 a.m.** | Welcome and Meeting Logistics
- 10:05 a.m.** | Opening Remarks
- 10:10 a.m.** | World Elder Abuse Awareness Month
- 10:30 a.m.** | Agency Spotlight
- 11:15 p.m.** | Break
- 11:30 p.m.** | LGBTQIA+ Older Adult Study Findings
- 11:45 p.m.** | 2023 Public Guardian Survey
- 12:00 p.m.** | EDJCC Adult Protective Services Subcommittee Update
- 12:15 p.m.** | Council Discussion and Pressing Issues
- 12:35 p.m.** | Public Comments
- 12:50 p.m.** | Closing Comments, Upcoming Meeting Dates, and Next Steps

Welcome



Susan DeMarois

Director, California Department of Aging

EDJCC State Co-Chair

Bertha Hayden

*Associate Vice President Justice for Seniors & Dependent
Adults, Bet Tzedek*

EDJCC Stakeholder Co-Chair

World Elder Abuse Awareness Month



Scott Pirrello

San Diego District Attorney's Office

EDJCC Member

ELDER FRAUD OVERVIEW

JUNE 18, 2025



TOP SCAMS

- **TECH SUPPORT / BANK SCAMS: Most Victims**
 - Often paired with Government Impersonation Scams
 - In person pickups
- **INVESTMENT SCAMS: Largest Loss Amount**
 - Pig-Butchering – Crypto
 - Often paired with Romance Scams

TOP SCAMS

OTHER FRONT RUNNERS

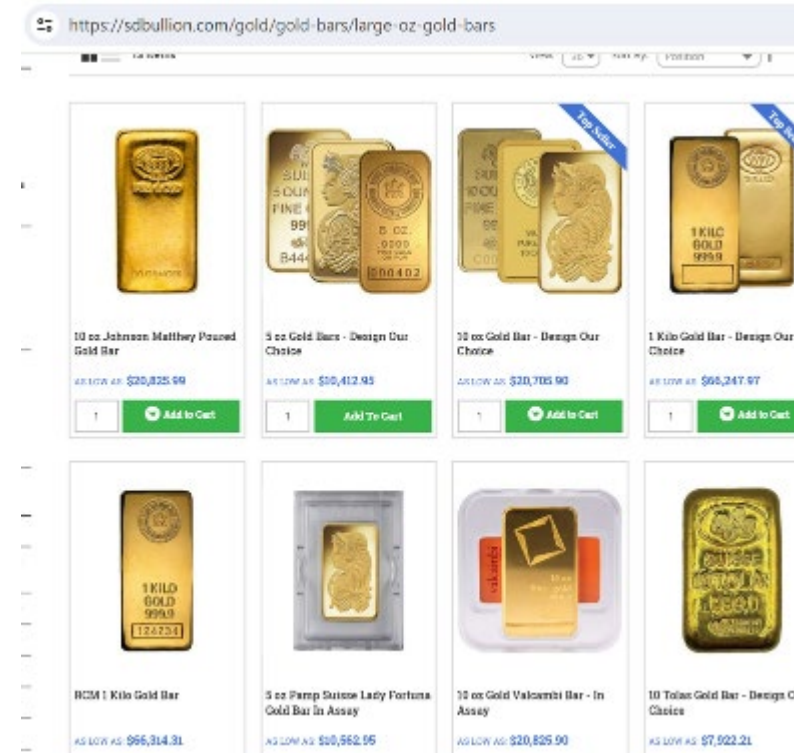
- **Romance Scams**
- **Lottery / Sweepstakes / Inheritance – Advance Fee**
- **Grandparent**
- **Government Impersonation**

HOW ARE THEY GETTING OUR MONEY?





WIRE TRANSFERS



CASH AND GOLD FOR PICKUP OR SHIPPED



CRYPTO CURRENCY ATM MACHINES



GIFT CARDS

(DECLINING ACTIVITY)

**WHAT TO DO
IF YOU HAVE
A VICTIM?
A FEW
THINGS YOU
SHOULD DO!**

- 1. DO WHATEVER YOU CAN TO STOP THE BLEEDING!**
- 2. REPORT TO FBI'S [Internet Crime Complaint Center](#)**
- 2. REPORT TO LOCAL LAW ENFORCEMENT**
- 3. REPORT TO ADULT PROTECTIVE SERVICES HOTLINE**
San Diego: 800-339-4661
California: 833-401-0832 (enter Zip Code for your County)

SAN DIEGO ELDER JUSTICE TASK FORCE



World Elder Abuse Awareness Month: Scams and Fraud Prevention



Tiffany Zhang

Community Outreach & Engagement Manager

AARP California

THE AARP FRAUD WATCH NETWORK

aarp.org/fraud



Fraud Watch Resources



Fraud Victim Support

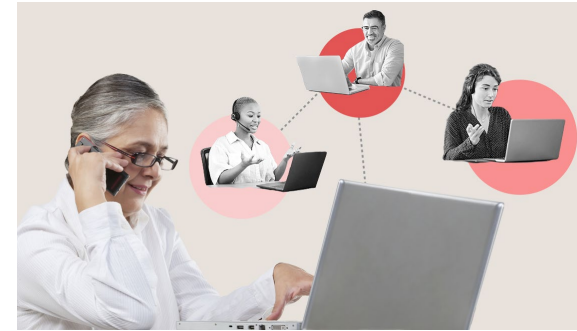
Fraud Helpline



877-908-3360

**Monday through Friday
8:00 a.m. to 8:00 p.m. ET**

Support Group



aarp.org/fraudsupport

**Online small group fraud victim
support sessions**



AARP Fraud Watch Network Changing the Narrative

Changing our words can change outcomes. Don't let victims suffer twice.

Here are examples of what to say:

Instead of this:

How could you fall for that?

Say this:

This isn't your fault — you experienced a crime.

Instead of this:

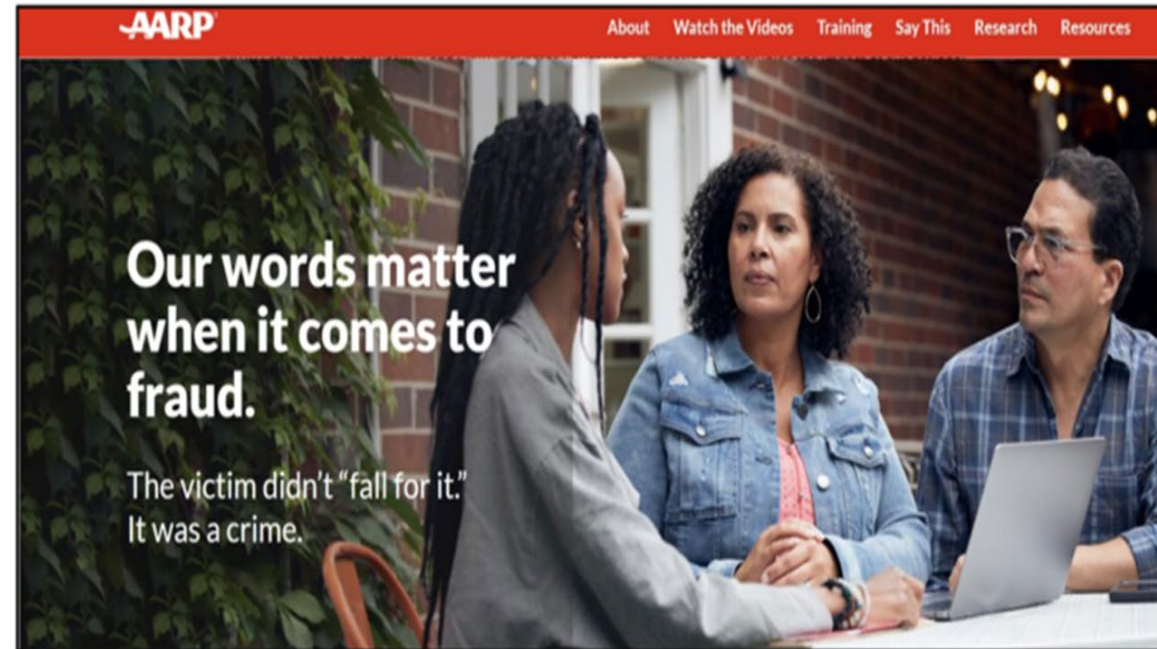
How much money did you give them?

Say this:

How much did the criminal steal?



Narrative Change for Societal Change



www.aarp.org/wordsmatter

AARP Resources

AARP Fraud Watch Network:

aarp.org/fraudwatchnetwork

Fraud Victim Support:

aarp.org/fraudsupport

Words Matter:

aarp.org/wordsmatter



Save the AARP Fraud Watch
Network Helpline to Your Phone:



877-908-3360



Council Questions and Discussion



Meghan Anderson

Supervising Deputy Attorney General

Division of Medi-Cal Fraud and Elder Abuse (DMFEA)



OFFICE OF THE ATTORNEY GENERAL CALIFORNIA DEPARTMENT OF JUSTICE

Division Of Medi-Cal Fraud & Elder Abuse

CALIFORNIA DOJ DIVISION

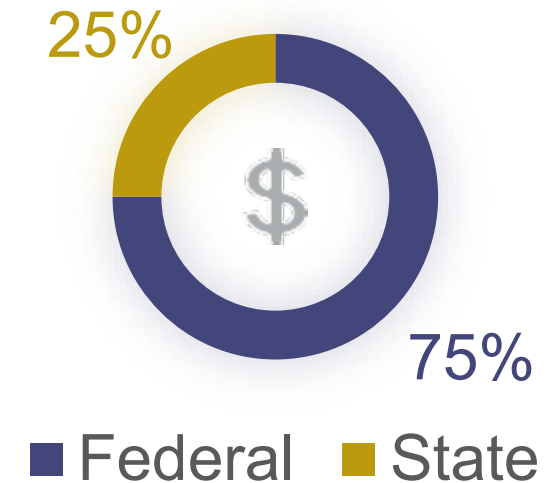
MEDICAID FRAUD CONTROL UNIT

Medicaid Fraud Control Units are defined in United States' Code and originate from 1970s Congressional hearings on fraud/abuse.

PARTNER AGENCY TO DHCS

Partner agency to the Department of Health Care Services that functions as the Single State Agency administering California's Medicaid program.

UNIQUE FUNDING STRUCTURE



CALIFORNIA MEDI-CAL STATISTICS



FISCAL YEAR 2023-2024



39.1M
California
Population



14,981,547
Medi-Cal
Beneficiaries
*Source: DHCS
– Feb 2024*



\$151.8
Medi-Cal
Spending
*Source:
LAO*



13,000
Health Care
Workers
*Source -
DHCS*



400+
Hospital
Providers
*Source -
DHCS*

REGIONAL OFFICES

Northern California

REDDING

SACRAMENTO

DUBLIN

Central California

FRESNO

BURBANK

Southern California

WEST COVINA

ORANGE

RIVERSIDE

SAN DIEGO



STATE & FEDERAL INVESTIGATION & PROSECUTION AUTHORITY

Fraud

**ORCHESTRATED AND
CONDUCTED BY MEDI-CAL
PROVIDERS**



Fee for Service or Managed
Healthcare Plans

**INDIVIDUAL
WHISTLEBLOWER**



Qui Tam



Violations

STATE & FEDERAL INVESTIGATION & PROSECUTION AUTHORITY

Abuse or Neglect



HEALTH CARE FACILITIES

Long-Term Health Care Facilities that accept Medi-Cal Patients



BOARD AND CARE FACILITIES

Two or more unrelated elders/dependent adults receiving substantial ADL assistance



NON-INSTITUTIONAL SETTINGS

Medi-Cal Recipients in a non-institutional or other setting provided the allegation occurred in connection with the provision of Medi-Cal services

- Pediatric Dentistry
- Medical Transportation Services

Special Agents



Legal Analysts
& Secretaries



Deputy
Attorneys
General

Medical
Professionals

INVESTIGATIVE & PROSECUTION PERSONNEL



Data
Development
Analysts



Complaint/Referral
Analysts

Digital
Forensics
Specialists



Investigative
Auditors



INVESTIGATIVE & PROSECUTION SKILLED EXPERTISE

Medi-Cal Data and Coding	Hospice Fraud	SNF Staffing Ratio Analysis
Bank Record/Financial Review	Vulnerable Victims/Witnesses	False Claims Act
Healthcare Fraud Schemes	Failure to Report	Nationally Linked Fraud Cases
Drug Diversion Schemes	Elder or Dependent Adult Charging Strategies - Exclusion	Whistleblower Cases (Qui Tam)

**Multi-disciplinary
team approach**

**Conducted During
Normal Business
Hours**

**Executed in Least
Intrusive Manner
Possible**

**Operation
Guardian (Pre-
COVID 19
Pandemic)**

**Operation SAFE
(Post-COVID 19
Pandemic)**

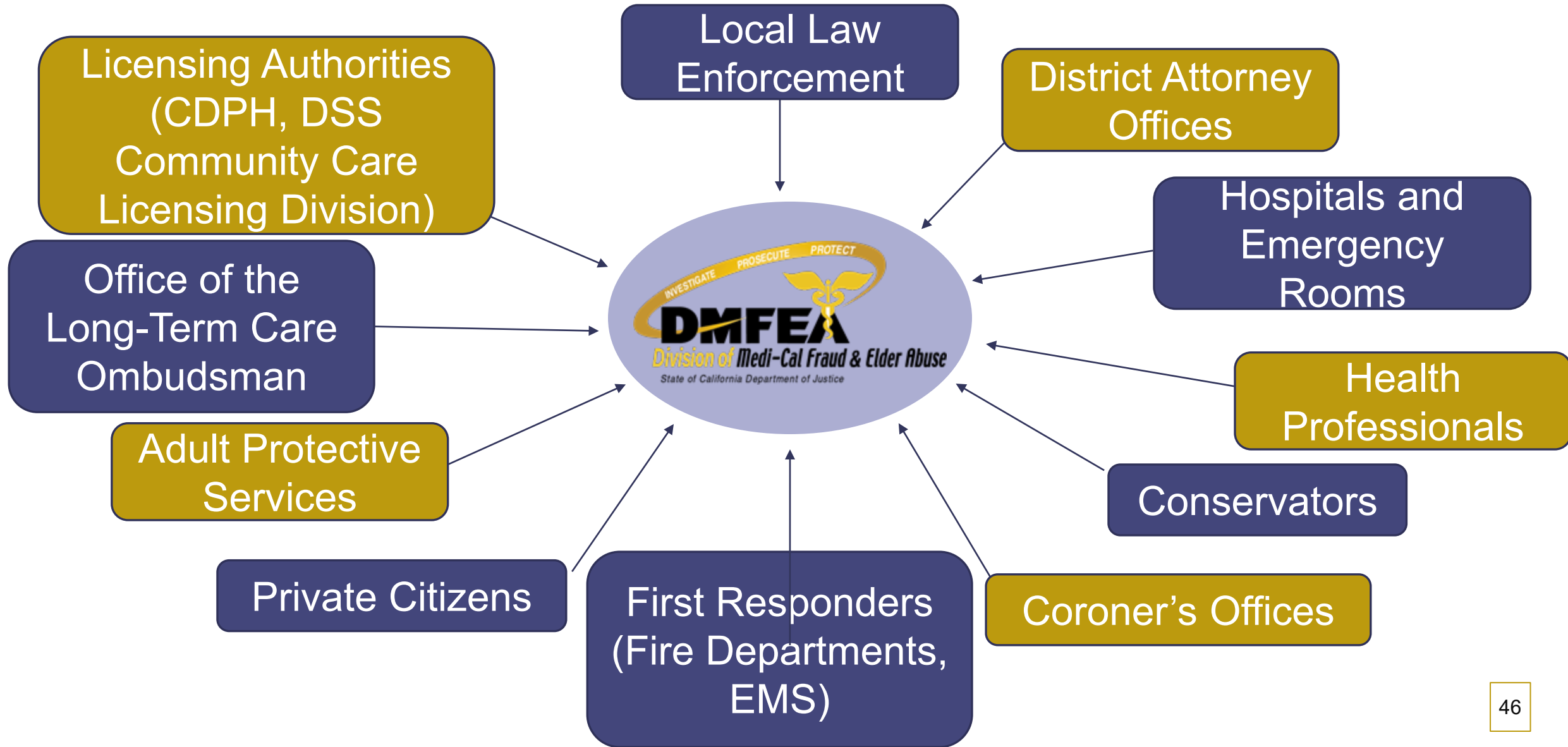
**California
Government
Code section
12528.1**



**STATE
INSPECTION
AUTHORITY**



REFERRALS TO DMFEA



Telephone

- 800-722-0432 (Hotline)
- 916-559-6180 (Outreach)

Fax: 916-263-0855

Online Reporting

- [DMFEA Fraud and Abuse Complaint Form](#)

Outreach E-Mail

- dmfeaoutreach@doj.ca.gov

Mailing Address

- Office of the Attorney General
Division of Medi-Cal Fraud and

Elder Abuse

Case Intake and Development Unit
2329 Gateway Oaks, Suite 200
Sacramento, CA 95833-4252

COMPLAINTS & REFERRALS





CROSS REPORTING TIPS

- Report Early
- Send to Outreach Email for Fastest Processing

dmfeaoutreach@doj.ca.gov



QUESTIONS?



Join the California DOJ Team! WE ARE HIRING

Current Openings:

- Attorneys
- Special Agents
- Investigative Auditors
- Nurses
- IT Specialists

Who Should Apply

If you are passionate about public service and share our commitment to serving and protecting Californians, please apply today.

Join us and gain access to amazing health, vision, dental, and retirement benefits from the State of California!

For additional information:
DMFEA_Personnel@doj.ca.gov

About DMFEA

DOJ's Department of Medi-Cal Fraud and Elder Abuse (DMFEA) protects California's most vulnerable residents and helps safeguard the state's Medi-Cal Program, which provides healthcare to Californians in need. DMFEA prosecutes those who would defraud the Medi-Cal program and protects its recipients — including individuals in nursing homes and other long-term care facilities— from abuse and neglect.



SCAN ME

Agency Spotlight

Office of the Long-Term Care Ombudsman



Eden Rosales

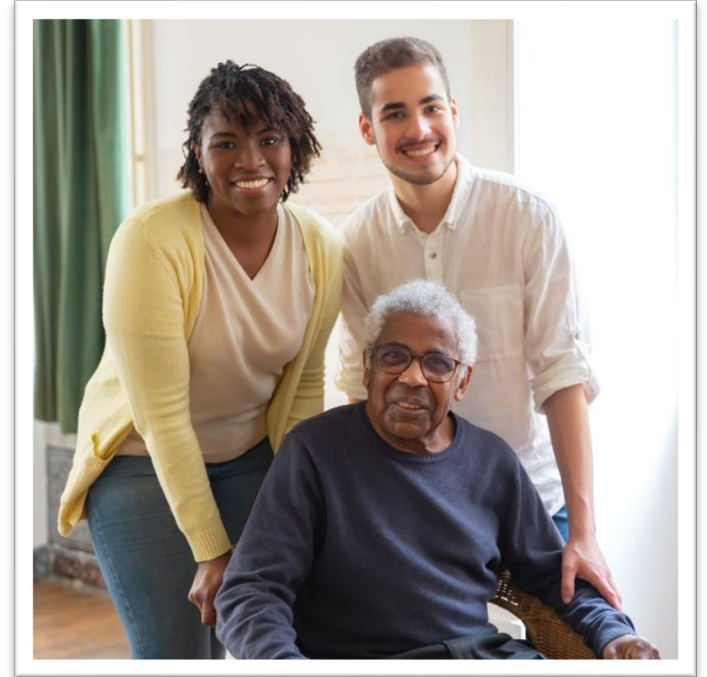
Acting State Long-Term Care Ombudsman
Office of the State Long-Term Care Ombudsman



California Long-Term Care Ombudsman Program Annual Report 2023-2024

The State Long-Term Care Ombudsman Program

Seek resolution of problems and advocate for the rights of residents of long-term care facilities with the goal of ensuring their dignity, quality of life, and quality of care. The Ombudsman works to affect change at the local, state and national levels to improve the quality of life and care for all individuals receiving long-term care.



The State Long-Term Care Ombudsman Program

California's State LTC Ombudsman has oversight responsibility for:

- 35 designated local Ombudsman entities
- 616 certified Ombudsman Representatives including:
 - 252 paid staff and
 - 364 certified volunteers



What do LTC Ombudsmen do?

- Help resolve problems for residents of nursing homes, board and care homes, and assisted living facilities.
- Respond to reports of abuse in long-term care facilities, intermediate care facilities, adult residential facilities, and adult day programs.
- Witness advance health care directives for residents of nursing homes.
- Operate a 24-hour CRISISline.
- Work to bring about systemic change in long-term care.



Residents' Rights

Residents have the right to:



Be treated with dignity and respect.



Be free from chemical and physical restraints.



Manage their own finances.



Voice grievances without fear of retaliation.



Associate and communicate privately with any person of their choice.



Send and receive personal mail.



Have personal and medical records kept confidential.



Apply for state and federal assistance without discrimination.



Be fully informed of available services and any charges for those services prior to admission.



Be given advance notice of plans to transfer or discharge them.

LTC Ombudsman Program Data 2023-2024



LTC Facilities and Beds

Complaints

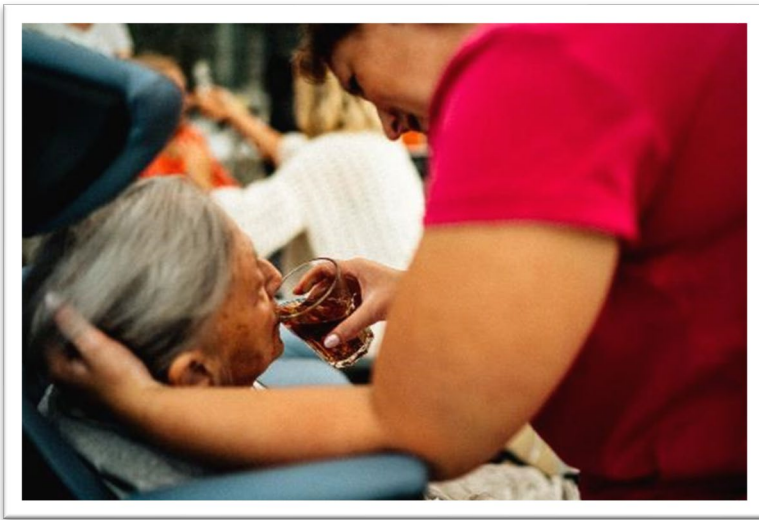
Resident Advocacy

Facility-Based Advocacy

LTC Facilities in California

In September, there were **1,189** Skilled Nursing Facilities (SNFs) and **7,798** Residential Care Facilities for the Elderly (RCFEs)

8,987 LTC facilities
with **322,218** licensed beds.



Other Specialized Facilities in CA



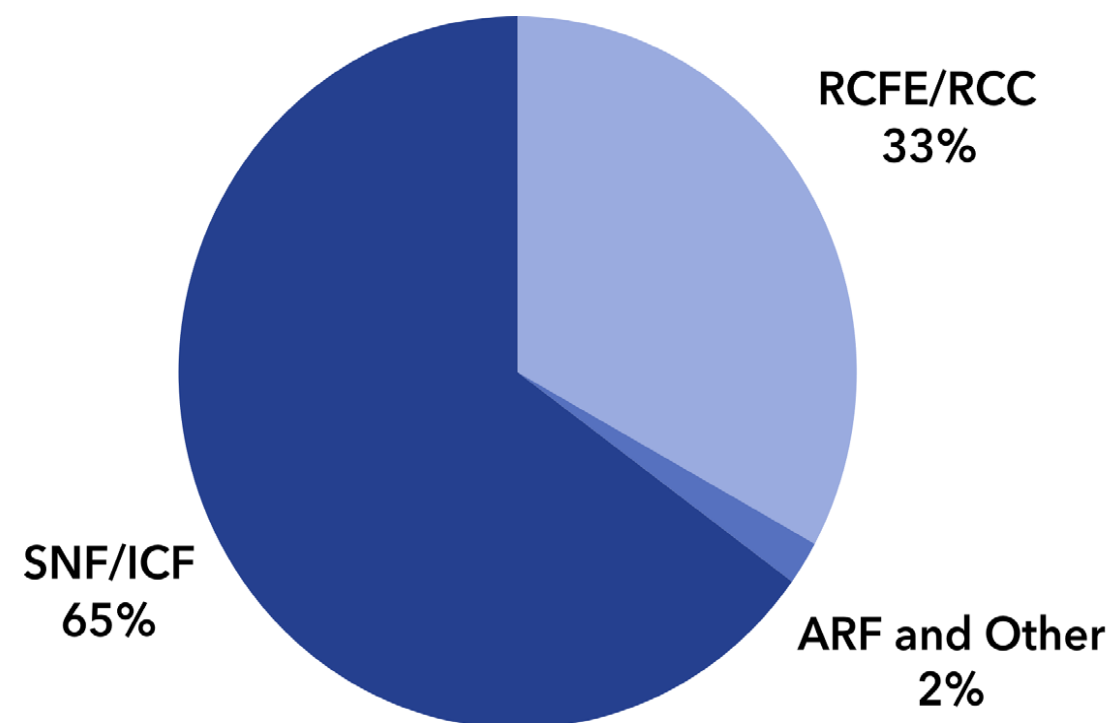
Facility Type	# of Facilities
Adult Residential Facilities (ARF)	5,953
Adult Day Programs	944
Social Rehabilitation Facility	319
ARF for Persons with Special Health Care Needs	93
ARF Community Crisis Home	24
Enhanced Behavioral Supports Home	77
Residential Facility for the Chronically Ill	<u>13</u>
	7,423

Complaints Received

Total Complaints by Facility Type

Facility Type	2023	2024
SNF/ICF	29,186	22,915
RCFE/RCC	14,031	11,499
Other	603	450
Total	43,820	34,864

Total Complaints by Facility Type FFY 2024



Top 5 Complaints by Facility Type

SNF Complaints FFY 2024		
Rank	Complaint Code	Total
1	Abuse: physical	3,511
2	Symptoms unattended	1,946
3	Care planning	1,665
4	Discharge or eviction	1,602
5	Abuse: psychological	1,049

RCFE Complaints FFY 2024		
Rank	Complaint Code	Total
1	Abuse: physical	1,215
2	Gross neglect	635
3	Supplies, storage and furnishings	566
4	Discharge or eviction	541
5	Financial exploitation	540

Ombudsman 24/7 CRISISline

Toll-free hotline to receive telephone calls concerning any crisis discovered by any person in a LTC facility

	<u>FFY 2023</u>	<u>FFY 2024</u>
CRISISline Calls Received	23,511	21,724

Advocacy Activities

<u>Activity Type</u>	<u>FFY 2023</u>	<u>FFY 2024</u>
Instances of Information and Assistance Provided to Individuals	94,657	84,167
Facility Visits	68,562	69,645
Resident Council Meetings Supported	2,319	2,924
Family Council Meetings Supported	174	213
Community Education Sessions	574	751

Advocacy Activities

<u>Activity Type</u>	<u>FFY 2023</u>	<u>FFY 2024</u>
Instances of Information and Assistance Provided to Facility Staff	22,684	34,282
Facility Staff Trainings	175	275
Facility Surveys Participation	195	288

Legislative Activity

State Advocacy

- Strengthened collaboration through Memorandums of Understanding with State Partners
- Legislative Initiatives
 - SB 1354 (Wahab) Payment Source Discrimination-Chaptered
 - SB 1406 (Allen) Residents right to request, refuse, or discontinue services-Chaptered
 - SB1249 (Roth) Revisions to the OCA- Chaptered

Federal Advocacy

- Recommendations to Centers for Medicare and Medicaid Services (CMS) on the Minimum Staffing Standards for Nursing Homes
- Comments to the Administration for Community Living (ACL) on:
 - proposed updates to the Older Americans Act and federal Adult Protective Services (APS) regulations



Volunteer Recruitment Initiative

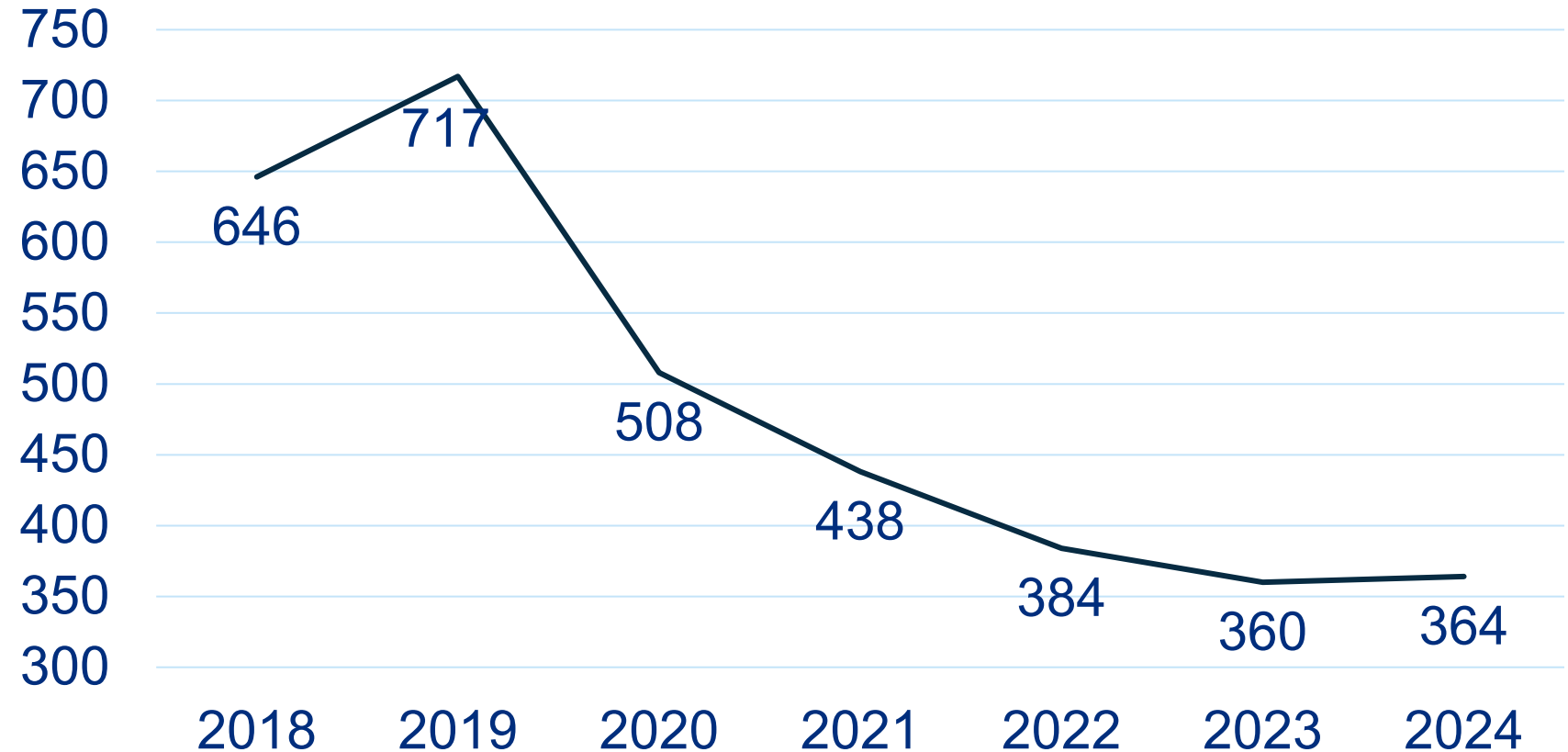


Ombudsman Program Volunteer Representatives



**Number of Ombudsman Volunteer
Representatives
2018-2024**

Decline in
Volunteer
Representatives



Goals of the Volunteer Recruitment Initiative

- Increase access to residents in long-term care facilities through expanding the volunteer workforce in California
- Modernize the State Long-Term Care Ombudsman brand and outreach strategies
- Expand the capacity and strategies for recruiting, retaining, and supporting volunteers across the state

Support California's Long-Term Care Residents

LTC Ombudsman advocate for the rights of the more than a quarter million Californians living in long-term care facilities today.

Help Spread
the Word!



Get Involved!

Annual Advocacy Report

The [2023-2024 Long-Term Care Ombudsman Annual Report](#) is now available.



Thank you!

Office of the State Long-Term Care
Ombudsman

2880 Gateway Oaks Drive, Suite 200
Sacramento, CA 95833

Tel: (916) 419-7510
Email: StateOmb@aging.ca.gov
www.aging.ca.gov

24-Hour CRISISline (800) 231-4024





Council Questions and Discussion



Break: 15 minutes

LGBTQIA+ Older Adult Study Findings



Ross Lallian

Chief of Research, DPRE

California Department of Aging

Dr. Kathleen M. Sullivan

Director

Optimal Aging

From Challenges to Resilience

Highlights from the First Statewide Survey Assessing the Health, Well-Being, and Service Needs of Midlife and Older LGBTQIA+ Adults Californians

June 2025



About the Challenges to Resilience Survey

- Purpose: To learn about the aging experience of LGBTQIA Californians age 50 and older.
- Over 4,000 respondents from every census region in California
- Aligns with Goal 3 California's Master Plan for Aging
- Baseline for future surveys and other data collection; identifies opportunities for action

The Survey Team



Berkeley

Center for the Advanced
Study of Aging Services



Survey Advisory Group & Coalition

- **Advisory Committee:** A diverse representation of both LGBTQ service providers and LGBTQ+ older adults; inform the survey. The committee provides feedback to the research team who incorporates it into the survey process.



Photo courtesy of MAP

Survey Advisory Group & Coalition

- **Coalition:** The study requires participation from a coalition of state agencies, LGBTQ+ service providers, and organizations serving older adults.
 - **Trusted Voices and Regional Connection:** These coalition members facilitate communication to the LGBTQ+ community in their state region, serving as trusted outlets for eligible participants.
 - **Leveraging Networks:** Use existing networks like the CRDP LGBTQ Hub, CenterLink, and the Dementia Care Network for coalition development.

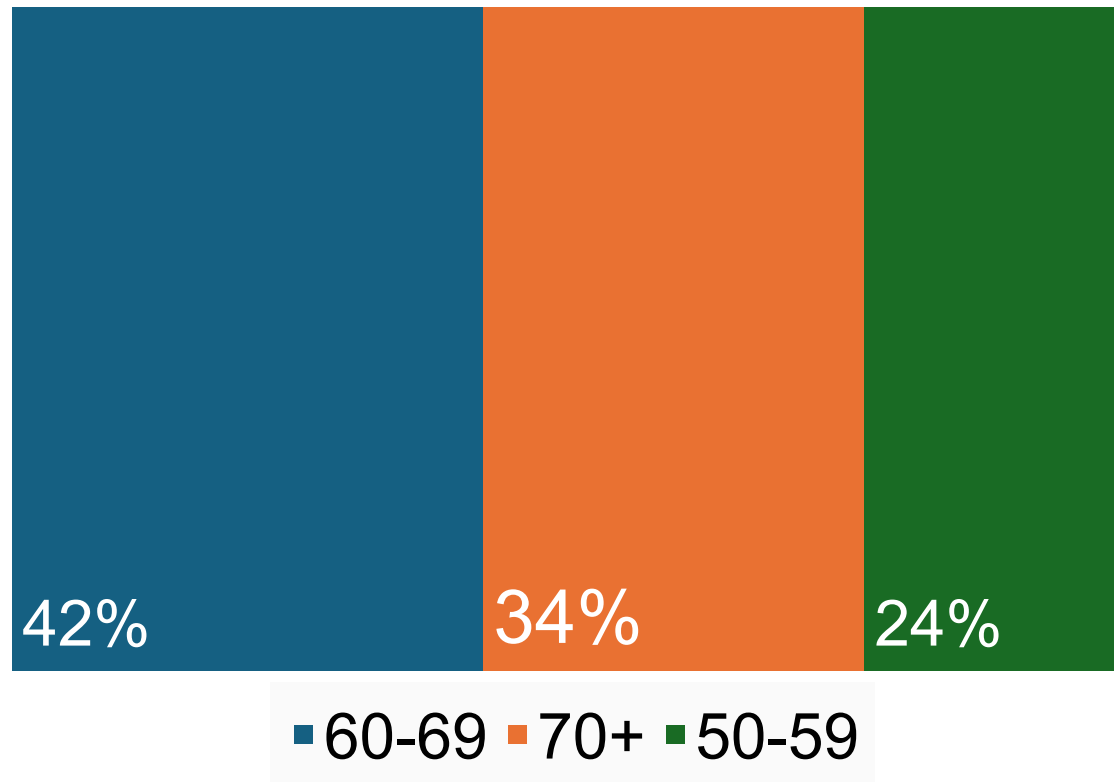


Photo courtesy of MAP

Participants

4,037 respondents from every census region in California

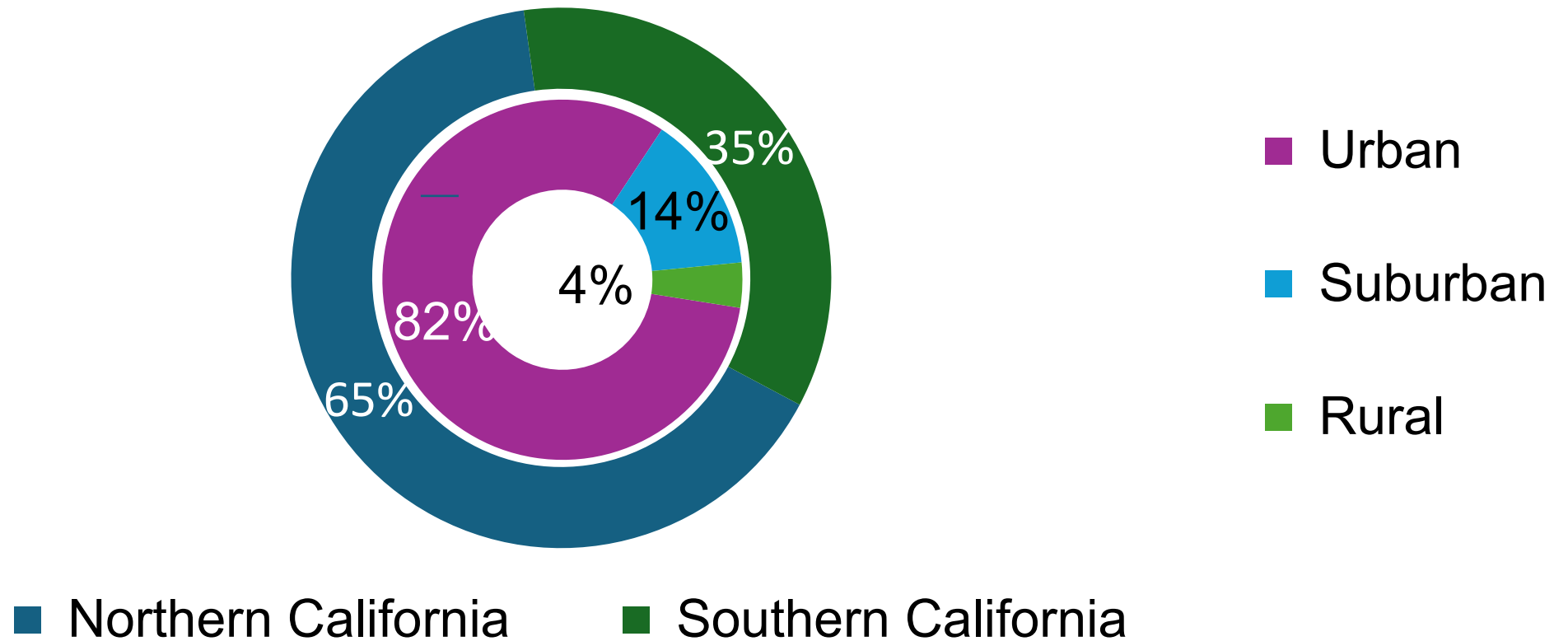
Age



Participants

4,037 respondents from every census region in California

Geography



Participants

4,037 respondents from every census region in California

Gender

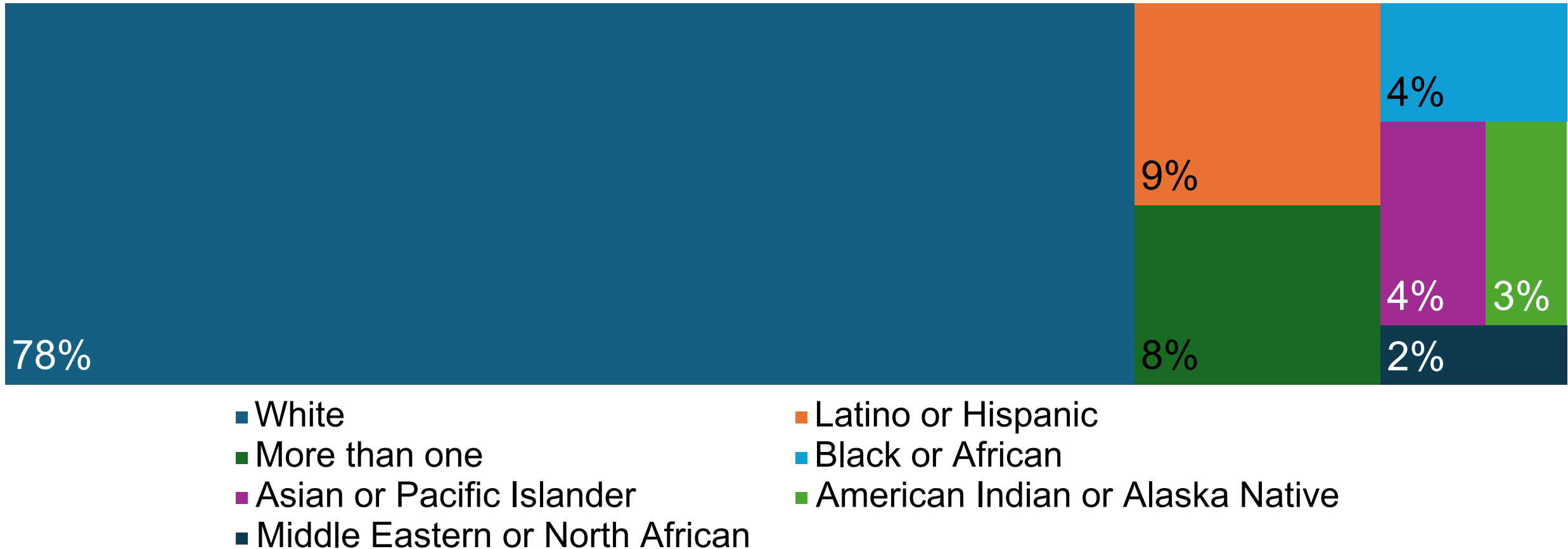


- Cisgender men
- Cisgender women
- Gender expansive assigned female sex at birth
- Gender expansive assigned male sex at birth
- Transgender women
- Transgender men

Participants

4,037 respondents from every census region in California

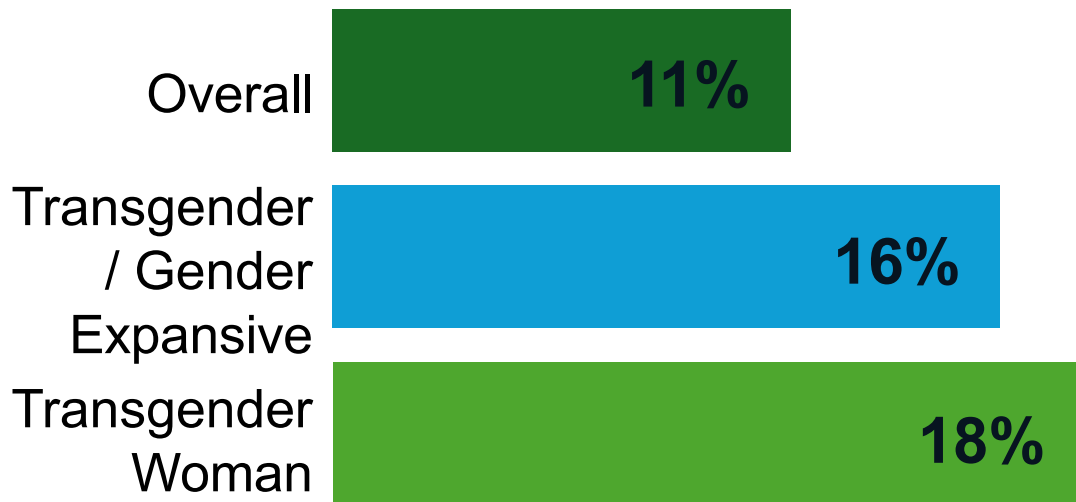
Race/ethnicity



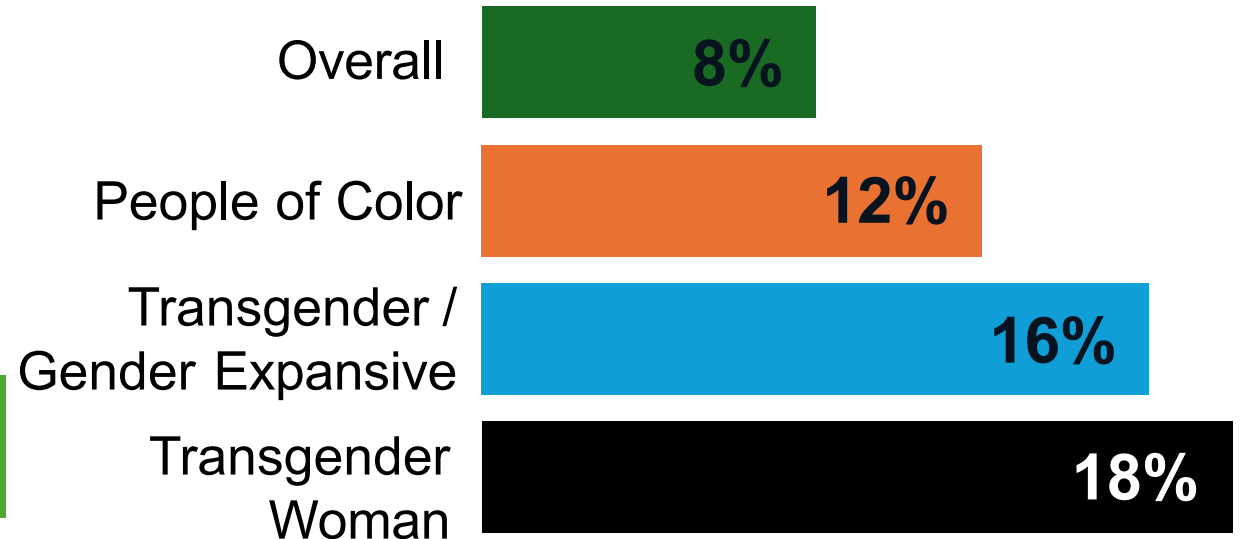
Physical, Cognitive, and Mental Health Challenges

- Barriers to access create persistent, unmet service needs that undermine physical, cognitive, and mental health status

Serious thoughts of suicide in last year
most common among transgender / gender
expansive people



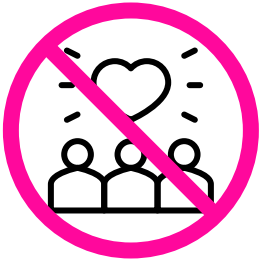
Lifetime experience of a
traumatic event



Social Well-Being



Social support services reported as a top unmet need.



7% of survey respondents report having no one to turn to



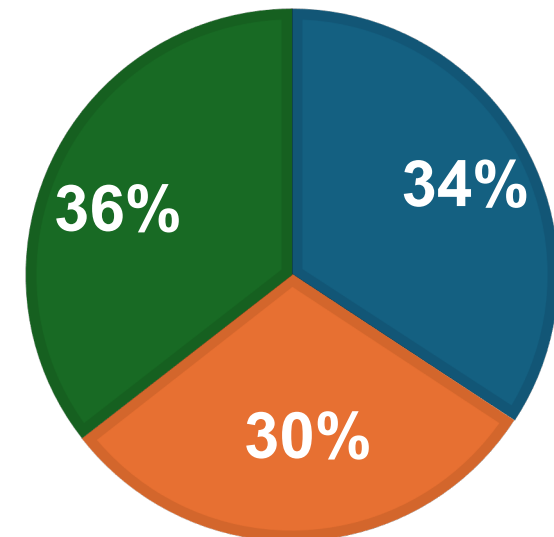
17% provide ongoing living assistance / care to others
- But only 8% receive this type of care

Financial Challenges & Food Insecurity

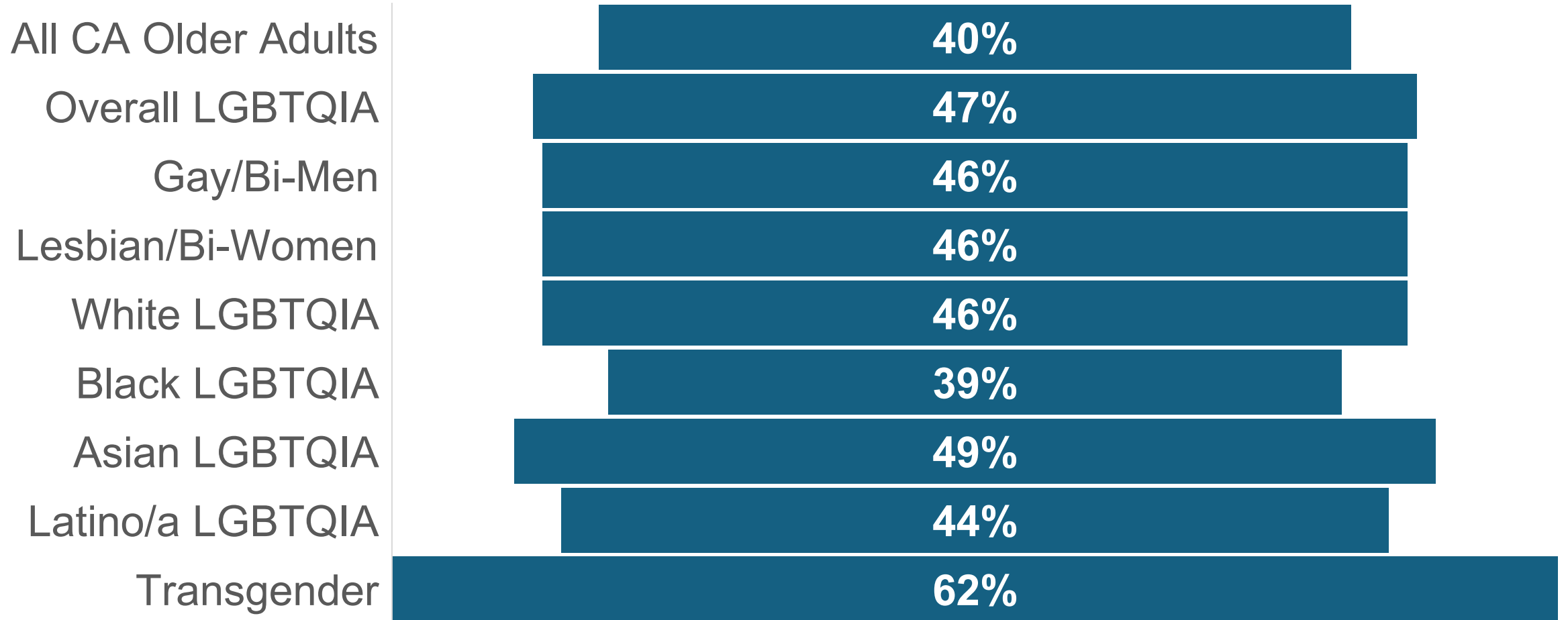
- Meaningful proportions of survey respondents (between 25% and 33%) report financial concerns, currently and looking ahead to the future.

EXPERIENCED FOOD INSECURITY LAST 12 MONTHS SOMETIMES, USUALLY OR ALWAYS

■ Rural ■ Suburban ■ Urban



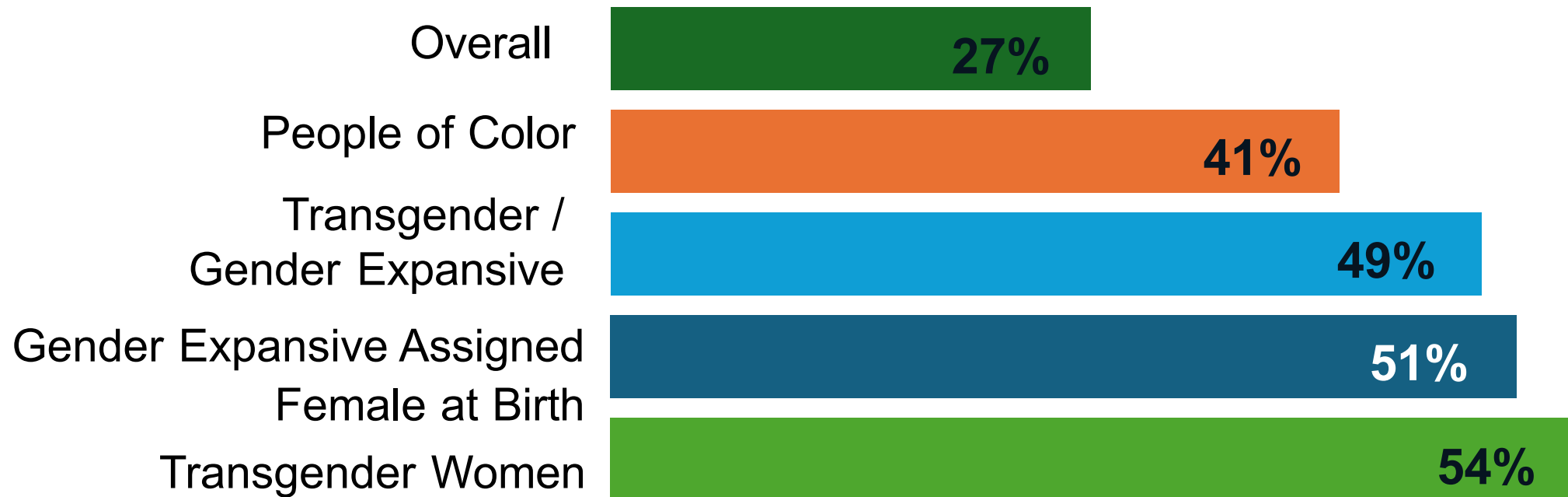
Reported Feelings of Isolation



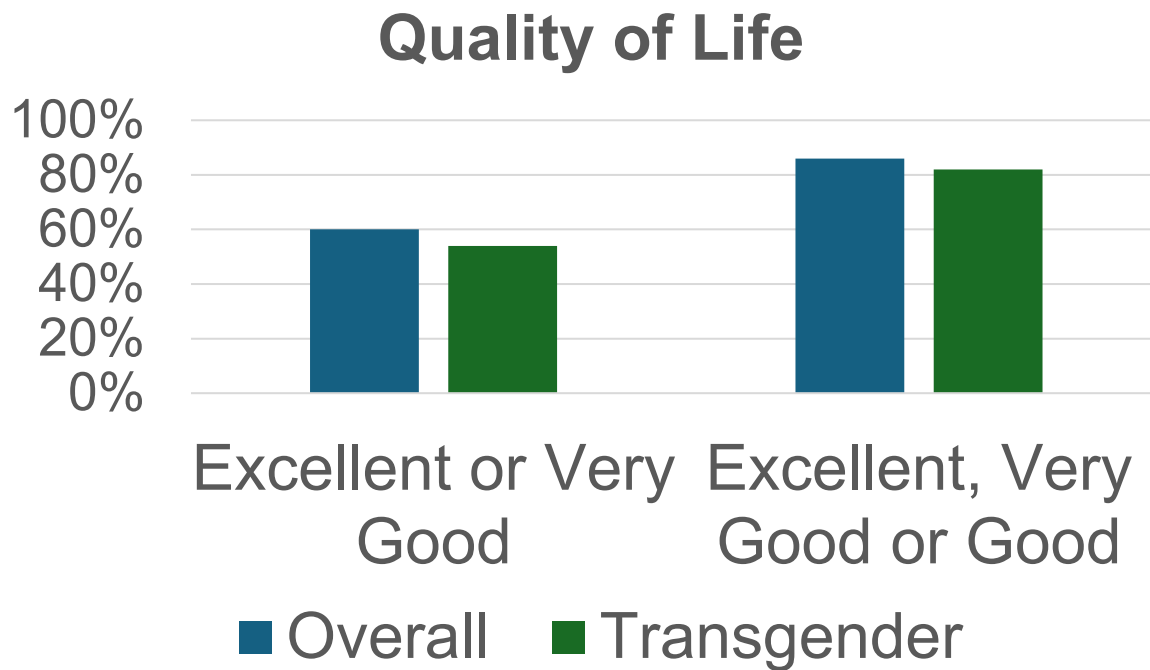
Discrimination & Safety

- Lifetime experiences inform mistrust in providers and authorities

Recent experiences with unfair treatment, disrespect, and discrimination



Signs of Resiliency



Opportunities for Action: Physical, Cognitive, and Mental Health Challenges

- **Address specific barriers to accessing health services.**
- **Focus intensively on tailored suicide prevention resources for LGBTQIA+ older adults.**
- **Include trauma-informed care in provider training that is specific to the needs of the LGBTQIA+ population.**
- **Develop and update directories of LGBTQIA+-affirming service providers & collaborate with local public health.**

Opportunities for Action: Economic Well-Being

- **Create financial services that provide support** to those who may have experienced long-term negative impacts of discrimination.
- **Expand resources and services that promote economic security** for current LGBTQIA+ older adults.
- **Ensure that Master Plan for Aging local solutions include LGBTQIA+-friendly housing options.**

Opportunities for Action: Social Well-Being

- **Support LGBTQIA+-led community spaces** for older adults.
- **Provide ongoing support specifically for LGBTQIA+-serving organizations** to offer programs that build social connections (e.g., intergenerational peer support groups).
- **Develop and require competency training** for organizations providing social support to seniors.

Opportunities for Action: Discrimination & Safety

- Help LGBTQIA+ older adults feel safer disclosing and reporting abuse and other issues by **training service providers** —especially those working in health care, mental health services, and as first responders.
- **Assess specific stigma-related barriers across different types of services** to help focus efforts to make services more welcoming and affirming.
- **Invest in mental health and social support groups** that could help LGBTQIA+ older adults navigate stigma and discrimination, especially by prioritizing resources designed to meet the needs of people of color and transgender / gender expansive people's experiences of stigma and discrimination.



Council Questions and Discussion

2023 Public Guardian Survey



Regina Wright

State Public Guardian Liaison, DPRE

California Department of Aging



2023 California Public Guardian Survey Findings

History of State Public Guardian Liaison



- The State Public Guardian Liaison position was created in the California Department of Aging (CDA)'s 2022-23 Budget Change Proposal for [Master Plan for Aging Implementation](#).
- This position serves as CDA's liaison with county public guardian programs and conducts research on **probate conservatorship** to formulate strategies to improve the quality of and access to probate conservatorships statewide with the goal of protecting vulnerable individuals from abuse, neglect, exploitation, and self-neglect.

Initiative 96

Assess needs and capacities of local Public Guardians, Public Conservators and Public Administrators, given growing and changing needs.

Implementation Year: 2021- 2022

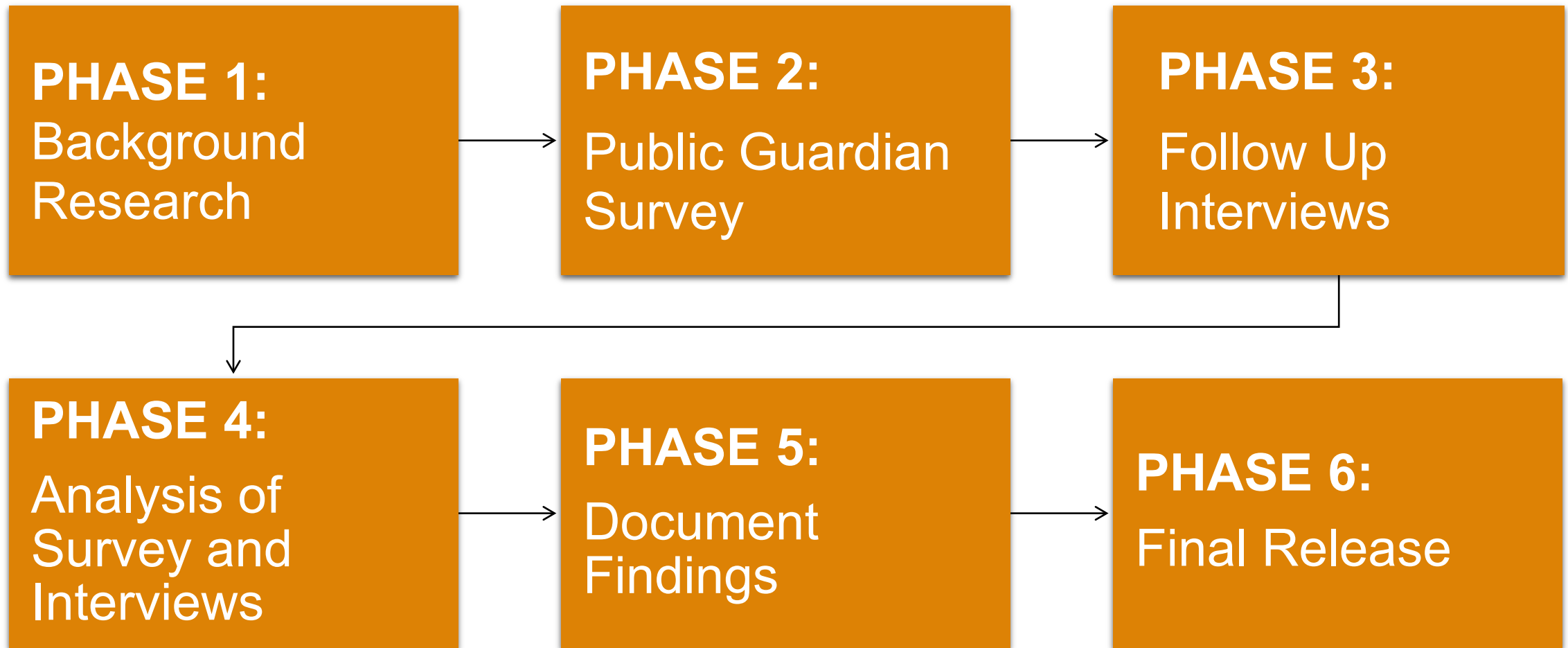
Goal 3: Inclusion & Equity, Not Isolation

Strategy E: Protection from Abuse, Neglect, and Exploitation

Initiative 69

Explore dedicated funding opportunities for probate guardianship with caseload standards based on acuity levels. This effort may align with AB 1663 (Chapter 894, Statutes of 2022) (Maienschein), which reforms California's probate conservatorship system to enable people with disabilities and older adults to pursue supported decision-making as a less restrictive alternative to conservatorship.

Project Plan



Overview

The survey and interviews focused on the probate conservatorship functions of California's public guardian programs.



The survey was conducted using SurveyMonkey from May – June 2023, and optional follow up interviews were held July – September 2023.



57 counties completed the survey.



53 counties also participated in the optional follow up interview.

Goal: Understand County Public Guardians

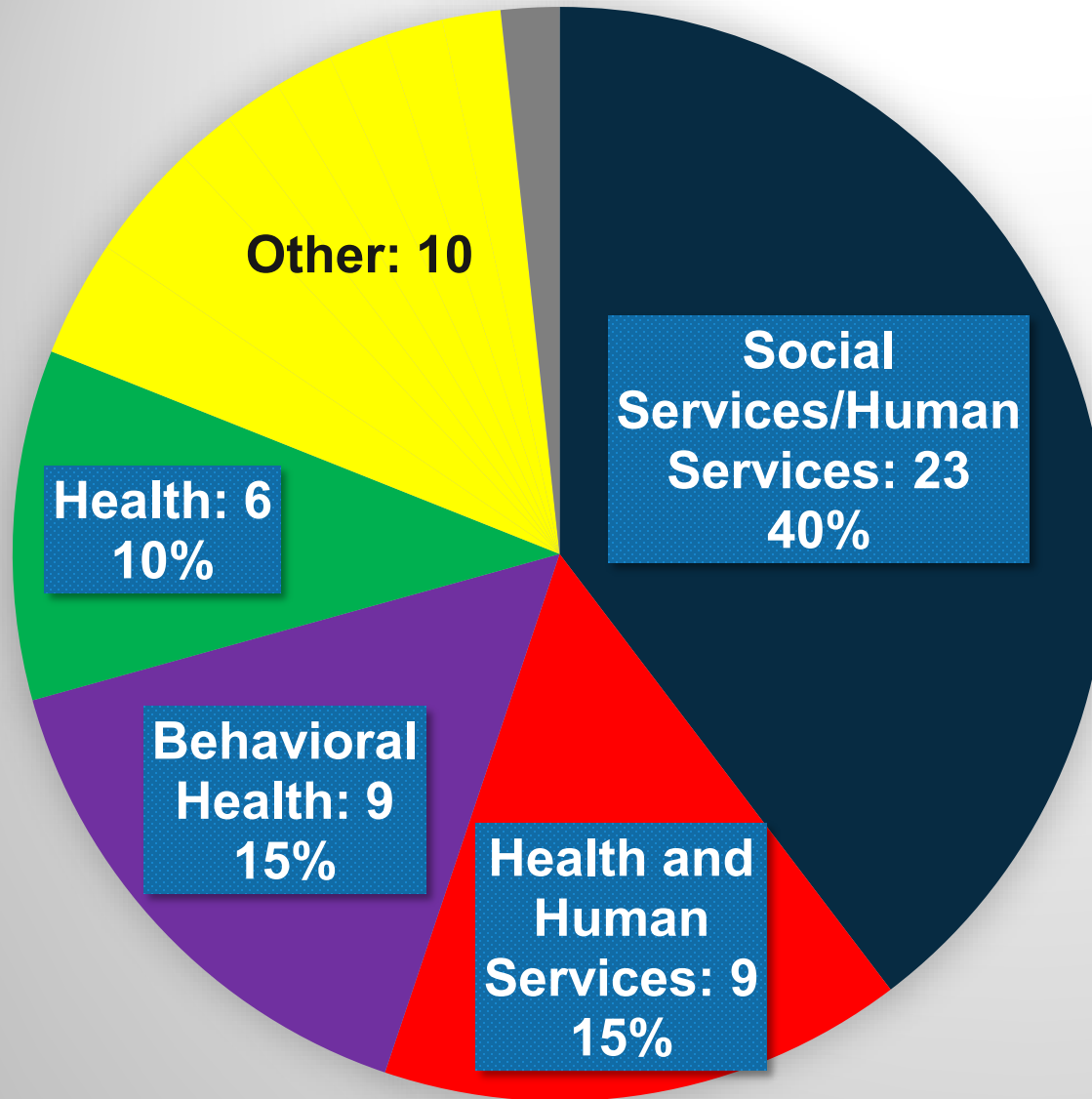


Learn about the probate conservatorship functions of county public guardians as part of the safety net to protect vulnerable individuals from abuse, neglect, exploitation and self-neglect.

Objectives

- 1) **Gather information** about how the probate conservatorship functions of public guardian programs are structured and administered across California counties.
- 2) **Identify common practices** and variations in how public guardians manage probate conservatorship cases.
- 3) **Understand the challenges** public guardians face in meeting the needs of probate conservatees.
- 4) **Document perspectives** from county stakeholders on system strengths and gaps.
- 5) **Build foundational knowledge** to inform future efforts to strengthen the probate conservatorship safety net.

Gather Information: Public Guardian Organizational Structure



Social Services/Human Services: 23

■ **Health and Human Services: 9**

■ **Behavioral Health: 9**

■ **Health: 6**

■ **Aging and Adult Services (Stand-Alone): 2**

■ **PA/PG/PC Stand-Alone: 1**

■ **PG/PC Stand-Alone: 1**

■ **PA/PG Stand-Alone: 1**

■ **Child, Family and Adult Services: 1**

■ **Employment and Social Services: 1**

■ **Treasurer-Tax Collector-Public
Administrator: 1**

■ **Veteran Services: 1**

■ **Area Agency on Aging: 1**

■ **No Public Guardian: 1**

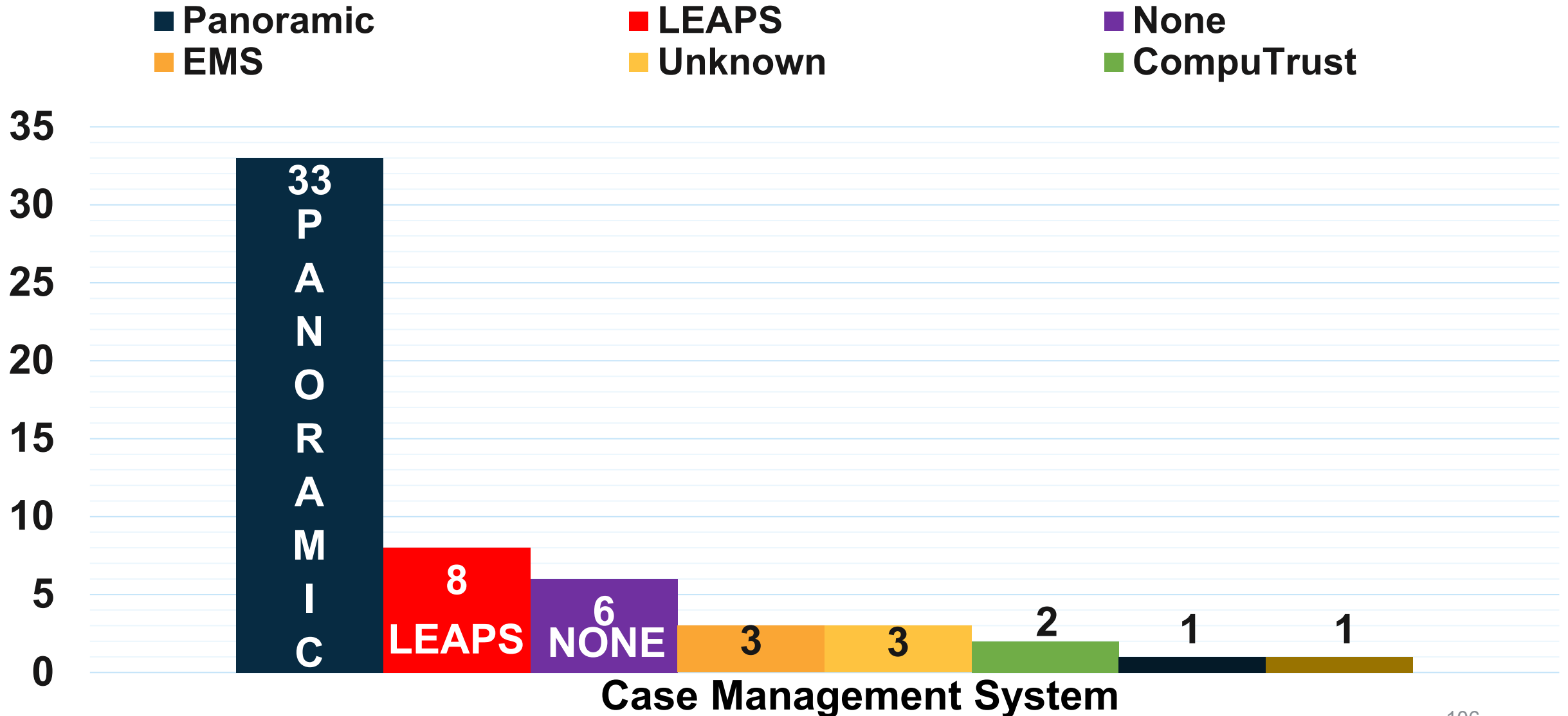
Understand Challenges: No Data Standardization Statewide

No standard data elements are collected statewide.

No systematic data collection at the county or state level for probate conservatorship.

Aggregating data from a case management system currently requires manual workload for most public guardians.

Identify Common Practices: Public Guardian Case Management Systems

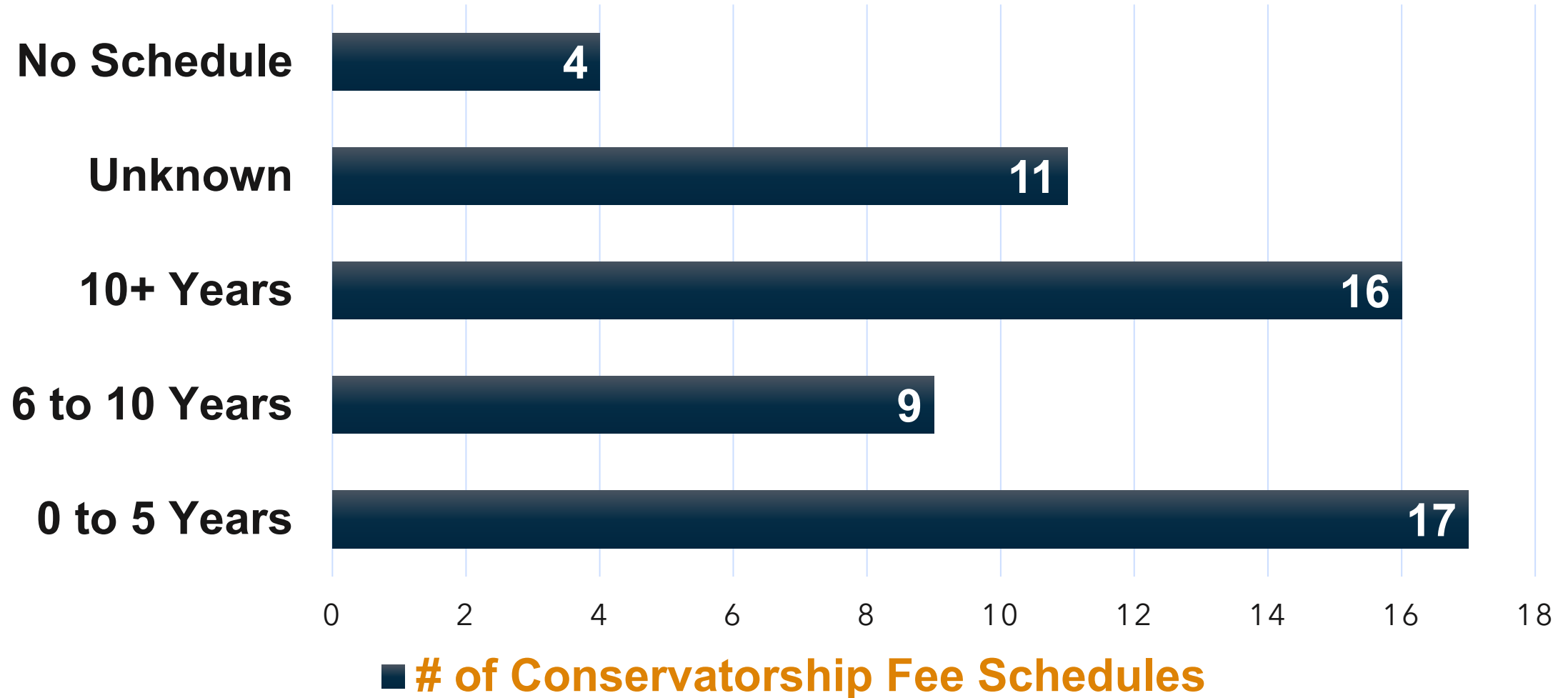


Understand Challenges: No or Limited Funding

Only four county public guardian offices reported having a separate budget for probate conservatorship.

Conservatorship fees charged to probate clients are absorbed back into the county general fund and not kept by the public guardian.

Gather Information: Conservatorship Fee Schedules



Understand Challenges: Housing Placement

Public guardians reported issues with placing probate clients in housing within the same county with the right level of care and supervision.

Probate clients with complex health needs including co-occurring behavioral health issues were reported as the most difficult to find housing.

Assisted living facilities were the hardest level of care to find housing due to the lack of facilities available within the county and the cost.

Document Perspectives: Housing/Facility Placement

“There are insufficient housing options for conservatees [. . .] so conservatees are most often placed outside their home county.”

“[. . .] there is a scarcity of suitable placements for low-income clients, which poses a challenge since the majority of our clients belong to this socioeconomic group and solely rely on social security benefits.”

“Hard to be in remote area with limited local placements. Also hard that [Medicaid] in CA doesn't pay for assisted living/dementia facilities, unless it is a SNF.”

Build Foundational Knowledge: Estimated Active Probate Cases and Referrals

As an estimate...

- There are **3,642 active probate conservatorship cases** in California with county public guardian offices.
- There are **2,863 referrals for probate conservatorship** made to county public guardians every calendar year.

Build Foundational Knowledge: Public Guardian & Adult Protective Services

70%
of public guardian
programs are in the
same county department
as adult protective
services in California



#1
referral source for
probate conservatorship
to the public guardian
is from adult protective
services in California

11
counties reported they
had a formal written
agreement between
adult protective services
and the public guardian



- There is not a standardized probate conservatorship referral form used statewide.
- Public guardians reported that their county multidisciplinary team (MDT) meeting is a primary forum to discuss potential probate conservatorship referrals and less restrictive alternatives. Most counties hold their MDT at least monthly.



Questions?

EDJCC Adult Protective Services Subcommittee



Akiles Ceron

APS Director

San Francisco Human Services Agency

EDJCC Adult Abuse Response Committee Chair

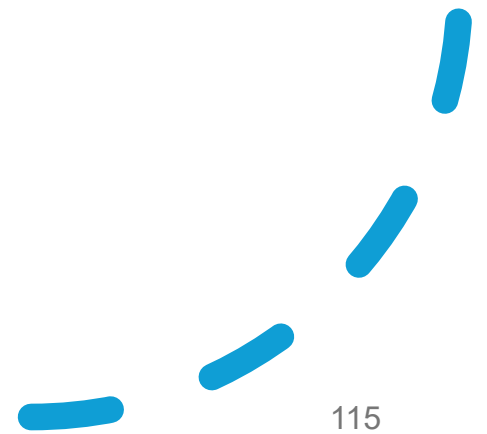
Adult
Protective
Services
(APS)
Subcommittee

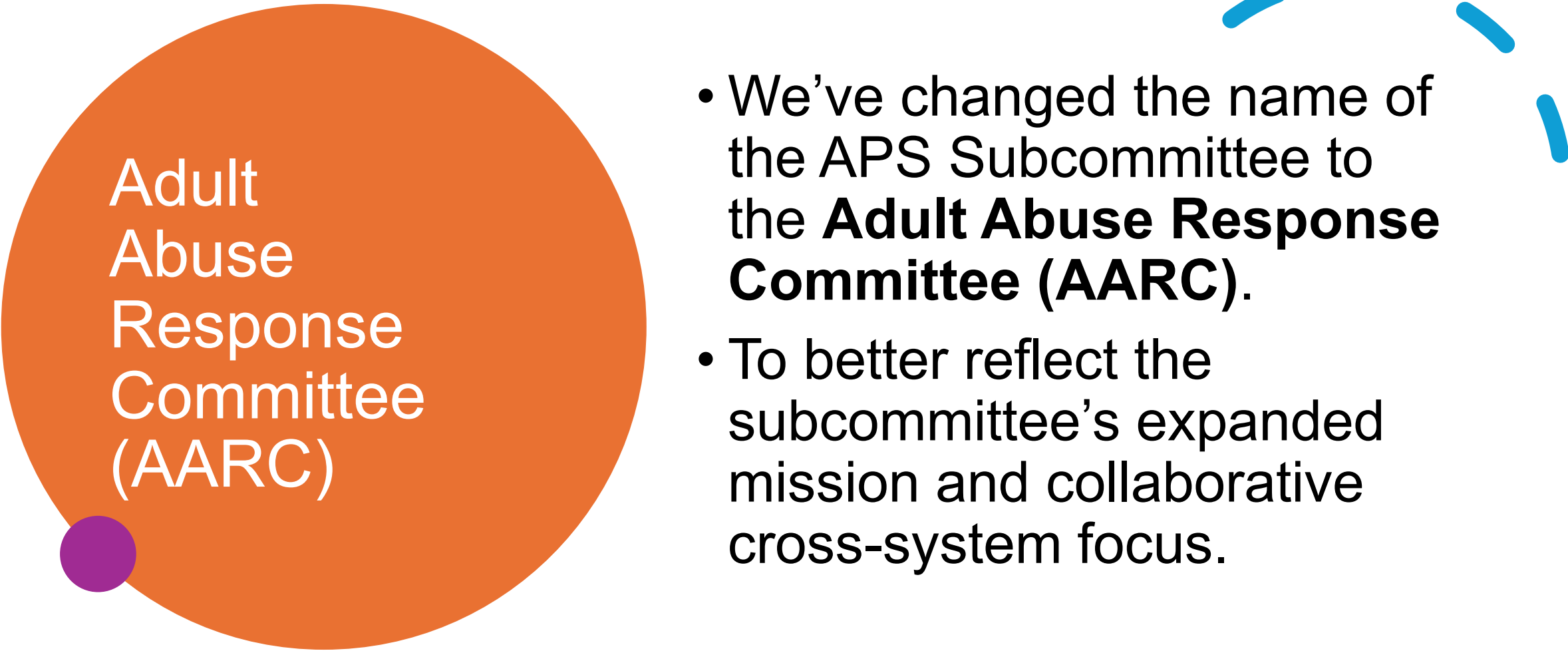
Akiles Ceron

APS Program Director

*EDJCC Adult Abuse Response Committee
Chair*

San Francisco Department of Disability
and Aging Services - Human Services
Agency





Adult Abuse Response Committee (AARC)

- We've changed the name of the APS Subcommittee to the **Adult Abuse Response Committee (AARC)**.
- To better reflect the subcommittee's expanded mission and collaborative cross-system focus.

Why AARC?

The new name captures the broader landscape of abuse prevention, intervention, and systems coordination for older adults and adults with disabilities, not limited to APS alone.

1. Reports of suspected abuse are made to various agencies
2. Who cross-report to each other
3. Who also respond to these reports
4. And who coordinate investigations & interventions

Council Discussion and Pressing Issues



Vivianne Mbaku

Equity Director

EDJCC Legal Services Subcommittee Chair

Justice in Aging

Public Comment



Attendees joining by **phone**, *press* *9 on your dial pad to join line. The moderator will announce the last 4 digits of your phone number and will unmute your line.



Attendees joining by **webinar (Zoom)**, *click* the raise hand button to join line. The moderator will announce your name or your last 4 digits of your phone number and will unmute your line.

Note: Public commentators will have 2 minutes.

For additional public comment, email Engage@aging.ca.gov.

Meeting Resources



- [Master Plan for Aging webpage](#)
- [EDJCC Stakeholder Committee Member Biographies](#)
- [CalHHS MPA - EDJCC Meeting webpage](#)
- [2025-2029 Older Americans Act State Plan](#)
- State Plan Public Comment Survey
 - [English](#) | [Spanish](#) | [Chinese](#) | [Korean](#) | [Vietnamese](#) | [Filipino](#)
- [Internet Crime Complaint Center](#)
- [AARP Fraud Watch Network](#)
- [AARP Fraud Support](#)
- [Fraud Prevention Resources](#)

Meeting Resources



- [Protect Yourself from Scams & Fraud](#)
- [Elder or Dependent Adult Abuse Restraining Orders in California](#)
- [Disaster Preparedness for Older Adults and Adults with Disabilities](#)
- [What is Supported Decision-Making?](#)
- [Supported Decision-Making Technical Assistance Program](#)
- [Division of Medi-Cal Fraud & Abuse \(DMFEA\)](#)
- [DMFEA Fraud and Abuse Complaint Form](#)
- [California Long-Term Care Ombudsman](#)
- [LGBTQIA+ Older Adult Survey Report](#)

Materials & Next Meeting Date



- Meeting materials, transcript, and recording are posted on the [CalHHS EDJCC Meeting webpage](#)
- **Next EDJCC Committee Meeting:**
 - Date: Thursday, October 16, 2025
 - Time: 10:00 a.m. – 1:00 p.m.
 - [Register for this meeting](#)



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