



# California Elder and Disability Justice Coordinating Council

**May 16, 2024 | 10:00 am - 1:00 pm**



# Welcome & Meeting Logistics Review



## **Carroll De Andreis**

*Manager, MPA Stakeholder & Public Engagement  
California Department of Aging*

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# Meeting Logistics

## 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.
- Committee 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 Committee 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](mailto:EngAGE@aging.ca.gov).

# 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](mailto:EngAGE@aging.ca.gov)

# Council Purpose

*The goal of the Elder and Disability Justice Coordinating Council 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.*

## **Guiding Principles and Strategic Priorities**

# Equity Guiding Principles

- 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.*
- 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.*



# Council Members (2024-2025)

## **EDJCC Co-Chairs:**

- Susan DeMarois, *Director, CA Department of Aging (CDA)*
- Bertha S. Hayden, *Directing Attorney, Bet Tzedek, EDJCC Stakeholder Co-Chair*

## **Council Members:**

- Tony Anderson, *Association of Regional Care Centers*
- Diana Boyer, *County Welfare Directors Association of California*
- 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*

## Council Members (2024-2025) cont.

### **Council Members:**

- Sandra Longnecker, *Riverside County District Attorney's Office*
- Liz Logsdon, *Disability Rights California*
- 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*
- Marty Omoto, *CA Disability Action Network*
- Carla Perissinotto M.D., *University of California San Francisco*

## Council Members (2024-2025) cont.

### **Council Members:**

- Scott Pirrello, *San Diego District Attorney's Office*
- Tim Perry, *California Commission on Aging*
- Tom Scott, *CA State Association of Public Administrators, Public Guardians, and Public Conservators*
- Valerie Smith, *Santa Clara County Social Services Agency*
- Jason Sullivan – Halpern, J.D., *California Long-Term Care Ombudsman*
- Janine Whiteford, *California IHSS Consumer Alliance*

# Meeting Agenda

- 10:00 a.m. Welcome and Meeting Logistics
- 10:05 a.m. Opening Remarks
- 10:15 a.m. 2024 Master Plan for Aging Day of Action
- 11:35 a.m. EDJCC Subcommittee 2024 Initiatives
- 11:40 a.m. Break (10 minutes)
- 11:50 a.m. Older Americans Act Final Rule Overview
- 12:15 p.m. Clarity Presentation
- 12:40 p.m. Public Comment
- 12:55 p.m. Closing & Next steps



# Welcome

***Sarah Steenhausen***

Deputy Director, California Department of Aging  
EDJCC State Co-Chair

***Bertha S. Hayden***

Bet Tzedek  
EDJCC Stakeholder Co-Chair





2024 Final Rule OAA Reauthorization

May Budget Revise

Senate Bill 1249 (Roth)

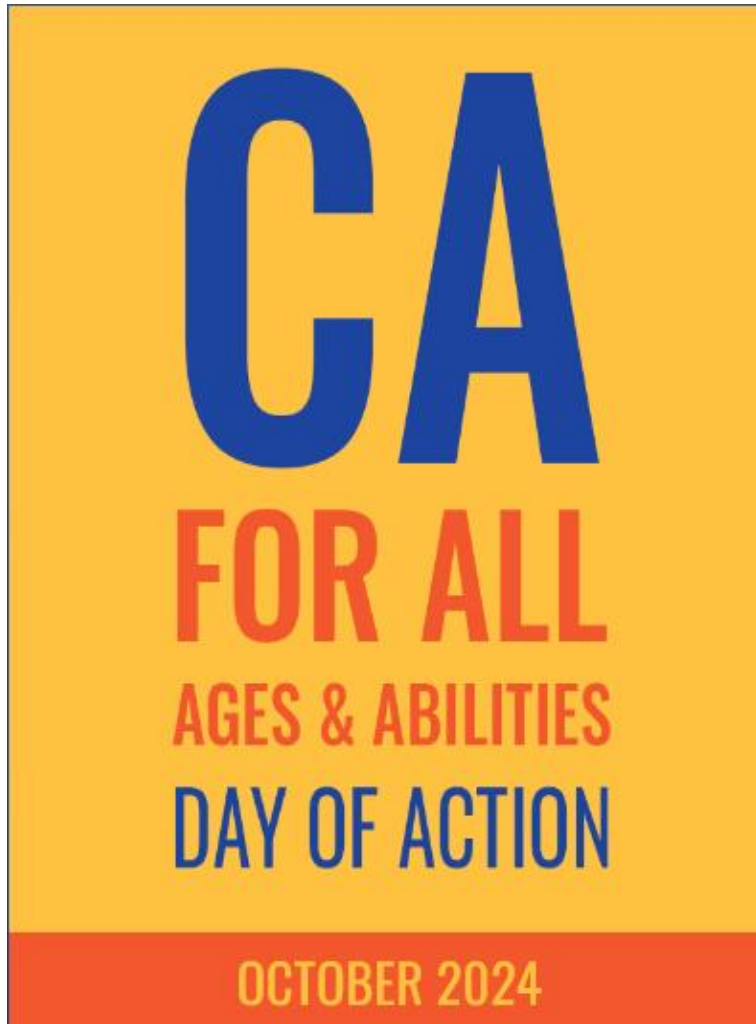
CA for ALL Ages & Abilities: 2024 MPA Day of Action

## **Jackie Tompkins**

*Master Plan for Aging, Project Director  
California Department of Aging (CDA)*

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# CA for ALL Ages & Abilities: 2024 MPA Day of Action



**Date:** Tuesday, October 8, 2024

**Location:** SAFE Credit Union Convention Center  
Sacramento, CA

**Time:** Full-day, specific time: TBD

**Registration:** Opens Mid-June 2024

**Website:** <https://www.caforall.org/>

Thank you to the MPA's philanthropic partners for supporting this event.



Metta Fund

THE ROSALINDE AND ARTHUR  
GILBERT FOUNDATION



MAY & STANLEY SMITH  
CHARITABLE TRUST

## **Focus future work on the highest priority issues facing Californians today & Center future MPA planning on equity and lived experience.**

- Gather priority recommendations from the Master Plan on Aging (MPA) Stakeholder Committees to inform the development of the MPA Initiatives for the next two years (25-26).

## **Celebrate progress to-date and renew our shared commitment to the MPA, California's 10-year blueprint for all ages and abilities.**

- Sustain and re-invigorate diverse partners and stakeholders on California's commitment to achieve the MPA's Five Bold Goals.

## **Engage Diverse Partners in the "Whole of Government Approach"**

- Be a model by convening state and national leaders to advance equity, collaboration, and integration among sectors in charting a path forward to prepare for the nation's aging population.

# MPA Stakeholder Committees

## A Roadmap to the 2025 - 2026 MPA Initiatives

### **1. Where Are We Now?**

- Understand the Baseline
- Develop a Problem Statement

### **2. Where Do We Want to Be?**

- Set & Define Goal(s) - What Does Progress & Success Look Like?

### **3. How Will We Get There?**

- Brainstorm Recommendations & Strategies

### **4. How Will We Know We Got/Are Getting There?**

- Describe the Outputs & Outcomes of Each Recommendation



# Planning Stages: A Preview of the Day

- **Hear from Consumers: Sharing Lived Experience**
- **Introduce the MPA Age & Disability Lived Experience Advisory Board**
- **Two Panels:**
  - 1) Advancing an Equity-Informed Home & Community Care System for All**
  - 2) Ensuring Affordable Access to Housing, Services, and Supports for All**
    - Focus area(s) of each panel to align with the MPA Stakeholder Committees
    - Weave in MPA Stakeholder Committee recommendations and priorities into the discussion
    - Panel Structure
      - MPA Stakeholder Committee Members
      - Consumers
      - Legislature
      - Administration
      - State Agencies
    - Public engagement opportunity
- **The Intersection and Alignment of Aging & Disability**
- **Conversation with California Policy and Budget Staff**



# Elder and Disability Justice Coordinating Council Subcommittees

## Legal Services

Vivianne Mbaku,  
Legal Services  
Chair

## Adult Protective Services

Akiles Ceron, Adult  
Protective  
Services Chair

## Conservatorship

Bertha Hayden,  
Conservatorship  
Chair



# Legal Services Subcommittee

Vivianne Mbaku

Equity Director, Justice in Aging

Legal Services (Chair)



# Legal Services Subcommittee Mission

The Legal Services Subcommittee, within the Elder and Disability Justice Coordinating Council (EDJCC) as part of the Master Plan for Aging (MPA), aims to center equity and formulate strategies to:

- To ensure that every older adult in California has access to comprehensive and reliable legal services.
- Empowering older adults and adults with disabilities to protect their rights, maintain independence, and lead fulfilling lives with dignity.
- Creating a centralized information hub for Legal Services resources.
- Identify gaps, create best practices, and recommendations.
- Identifying resources, including funding opportunities to enhance Legal Services.
- Emphasizing Elder Justice and the Master Plan for Aging.
- Provide recommendations to the legislature that creates an ongoing funding opportunity that does not limit resources for services.

# Legal Services Subcommittee Updates

- ▶ Subcommittee members participated in a presentation from Lorin Kline of the Legal Aid Association of California on the issue of 'public interest drift' and its impacts on legal service delivery in California. The subcommittee is committed to finding ways to increase staff retention at legal aid organizations and lessen public interest drift.
  - ▶ LAAC released a paper on this issue:
    - ▶ [“Does ‘Public Interest Drift’ Exacerbate the ‘Justice Gap’” by Zachary Newman and Salena Copeland](#)
- ▶ Subcommittee is preparing goals to present at the MPA Day of Action
- ▶ Subcommittee is also discussing existing legal aid referral systems and how non-legal aid organizations (i.e. District Attorney, private attorney etc.) can refer potential clients to legal aid



Adult  
Protective  
Services  
(APS)  
Subcommittee

Akiles Ceron

APS Program Director, San Francisco  
Human Services Agency

Adult Protective Services (Chair)

# Adult Protective Services (APS) Subcommittee Mission

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The APS Subcommittee, within the Elder and Disability Justice Coordinating Council (EDJCC) as part of the Master Plan for Aging (MPA), aims to center equity and formulate the following strategies:

- a) To ensure that every older adult and adult with disabilities in California receives a timely response to reports of abuse, neglect self-neglect and exploitation (ANSE) by APS, and the agencies designated by the State to receive and respond to cross-reports.
- b) To ensure effective coordination of interagency interventions, remedies and treatment strategies to ANSE, and to support the wellbeing, liberty, and independence of older adults and adults with disabilities, and the protection of their real and personal property.

# APS Subcommittee Updates

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The APS Subcommittee members met monthly to discuss our stated 2024 priorities, to ensure that reports of suspected abuse of older adults and adults with disabilities can be made without confusion for a timely, competent and collaborative response and intervention.

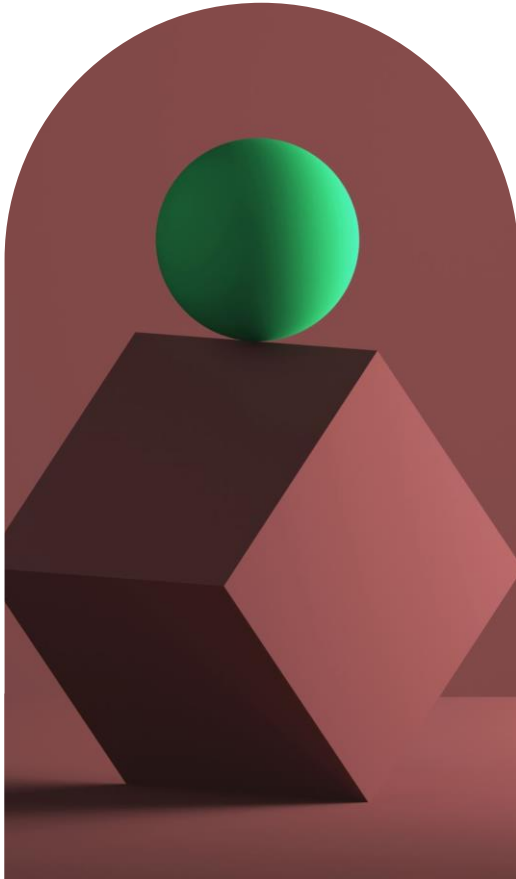
We focused primarily on:

1. Simplifying where these reports are made.
2. Who receives these reports.
3. Who responds to these reports.
4. What is an effective collaboration for investigation & intervention.

# CONSERVATORSHIP SUBCOMMITTEE

Bertha S. Hayden  
Directing Attorney, Bet  
Tzedek  
Conservatorship (Chair)





# Mission Statement

The Conservatorship Workgroup, operating within the Elder and Disability Justice Coordinating Council as part of the Master Plan for Aging, aims to center equity and formulate strategies to:

Educate the general public, professionals who work with older adults and adults with disabilities about probate conservatorship and other decision-making tools (supported decision-making, advance health care directives);

- Identify current data sources and make recommendations how to streamline and centralize data collection for probate conservatorships;
- Identify gaps in the conservatorship system and make recommendations to improve/augment services for conservatees; and
- Identify gaps, best practices, and make recommendations to streamline referrals between Adult Protective Services and Public Guardian programs.

CONSERVATORSHIP SUBCOMMITTEE  
UPDATE -  
LISTENING SESSION SERIES

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**Fatima Villaseñor , CASCI**  
President

California State Association  
of Superior Court  
Investigators (CASCI)

Rebecca May, Bureau Chief  
Professional Fiduciaries  
Bureau

C O N S E R V A T O R S H I P   S U B C O M M I T T E E  
U P D A T E - L I S T E N I N G   S E S S I O N   S E R I E S

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**Lisa Nerenberg**

**California Elder Justice Coalition**

New grant from Judicial Council of California (JCC) for Protecting the Rights of Adults Under Conservatorship in California, a 35-month project to identify court practices for ensuring due process and accountability in conservatorships

<https://www.elderjusticecal.org/conservatorship-study.html>

**Jim Berchtold**

**Justice In Aging**

**Equitable Guardianship Reform Series**

<https://justiceinaging.org/post-adjudication-rights-reform/>



# Committee Questions and Discussion



BREAK  
(10 minutes)

# Older Americans Act: New Regulations

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Fay Gordon, Regional Administrator, Region IX



# Agenda

- Introduce ACL Regions
- Older Americans Act Final Rule Overview
- Highlight Resources of Interest
- Hear from you!



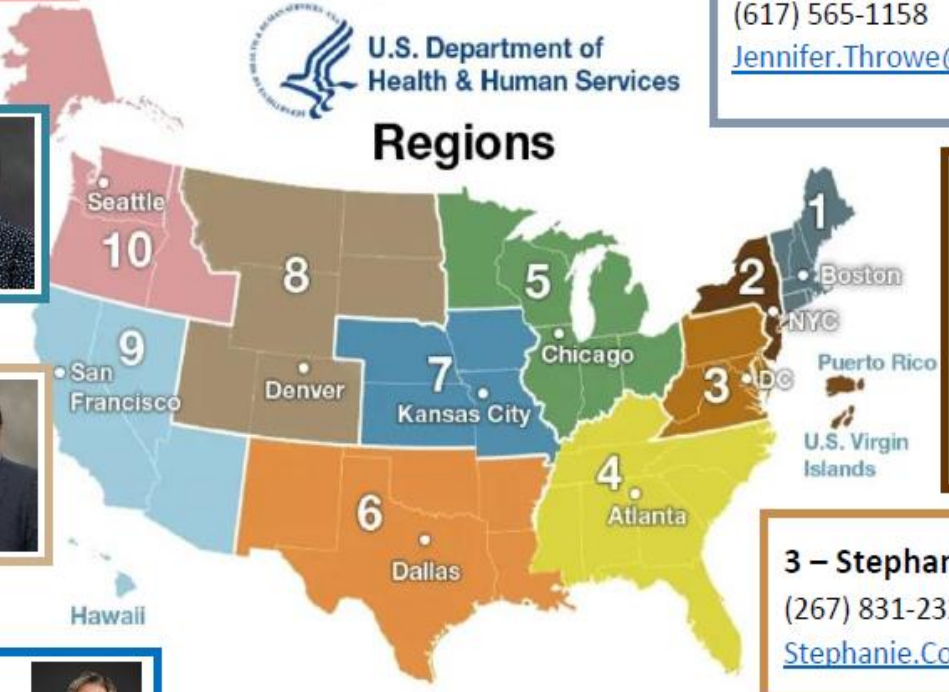
# About the ACL Regionx



Administration for Community Living  
Center for Regional Operations



### Regions



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# Older Americans Act Regulations: Overview





# OAA Program Regulations Background

The last substantial update to most OAA program regulations was in 1988. Since then:

- the population of older adults has nearly doubled,
- older adults are living longer than ever before, and
- expectations for aging have shifted,

Then and now: Almost all older adults want to continue to live independently in the community, and nearly 95% do.



# Purpose of the Final Rule Updating the OAA Regulations

- Update regulations to align with the current statute
- Reflect the needs of today's older adults
- Promote appropriate stewardship of OAA resources
- Clarify programmatic requirements
- Support the national aging network that delivers OAA services
- Improve program implementation to better serve older adults and caregivers



# General Note on the OAA Final Rule

The vast majority of what is included in the final rule are **long-established OAA requirements** – i.e., reaffirming what is in statute, prior regulations, or existing policies – rather than new requirements.



# Effective and Compliance Dates

- **Effective Date:** 30 days after publication in the Federal Register, March 15, 2024.
- **Compliance Date:** October 1, 2025.
  - **Corrective Action Plan (CAP):** State agencies who are unable to comply with the final rule by the October 1, 2025 date will have the ability to submit a CAP to ACL that, if approved, provides additional time to achieve compliance.



# OAA Final Rule Resources

- The [Older Americans Act Final Rule](#)
- ACL's OAA Regulations webpage: [ACL.gov/OAArule](https://acl.gov/OAArule)
  - Fact sheets
  - ACL announcement and additional resources
  - Information on upcoming webinars and other updates
- ACL is providing robust technical assistance and engaging stakeholders in implementing the final rule



# Upcoming OAA Technical Assistance

- **Webinar #1 Stewardship, Oversight, and Advocacy Responsibilities:** [Webinar recording](#), [Slides](#)
- **Webinar #2 Fiscal Policies and Procedures:** Webinar recording and slides coming soon
  - Covers: Area plan administration, match requirements, MOE requirements, buildings, alterations, maintenance and equipment
- **Webinar #3 Title III-VI Coordination:** May 23, 2024, 3:00 PM Eastern Time



# Additional Planned Webinar Topics

- State Plans on Aging, Area Plans, and Intrastate Funding Formulas
- Contracts and Commercial Relationships
- Emergency and Disaster Requirements
- Nutrition
- Legal Assistance and Alternatives to Guardianship



## **Questions to ask when it comes to requirements and flexibilities:**

Is this an OAA law or regulation requirement?

Is it another federal law or regulation?

Is this a state policy or procedure?

Is this an area agency on aging (AAA) policy or procedure?


Is this a local service provider policy or procedure?

Based on who is responsible for the requirement, what are your options for changing it or advocating for changing it?



## Questions to ask when it comes to requirements and flexibilities:

Policies and procedures at the state, AAA, and service provider level are essential for proper stewardship of Federal grant funds, and must meet the following requirements (not an exhaustive list):

- Older Americans Act, Public Law (P.L.) 89-73 as amended through P.L. 116-131, enacted March 25, 2020.
  - Executive Orders
  - 45 CFR parts 1321, 1322, 1324: Older Americans Act Regulations
  - 45 CFR part 75 & 2 CFR part 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements
  - ACL policies and procedures
  - Award terms and conditions
  - State and local laws and regulations
- 

# Review how you currently implement OAA requirements

Identify existing:

- Policies and procedures
- Administrative rules
- Program manuals, training materials
- Program instructions, area plan templates
- AAA and/or service provider contracts
- Reporting requirements

Review and assess



# Decide how you will make updates

## Identify what needs to be updated

- Your SUA's existing policies and procedures may already fully meet OAA Final Rule requirements
  - E.g., § 1321.49 Intrastate funding formula
- Some OAA Final Rule requirements allow the SUA to exercise certain flexibilities, at the SUA's option
  - E.g., § 1321.101 Flexibilities under a major disaster declaration
- Prioritize – where will you start? How will you break into manageable bites?

## Identify who is responsible for determining the what/who/how

- One or more individual staff members?
  - Workgroups?
- 

# Committee Questions and Discussion



## Clarity

***Sarah Hooper, J.D.***

University of California Law, San Francisco

***Denise Watt, J.D.***

University of California Law, San Francisco

***David Farrell, MPH***

People Designs



**CA Elder & Disability Justice  
Coordinating Council**  
May 16, 2024



# Clarity Team

**People Designs**

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**David Farrell, MPH**

Irene Tessaro, DrPH

David Menestres

**UC Law** SAN FRANCISCO

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**Sarah Hooper, JD**

Denise Watt, JD

**UCSF**

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**Rebecca Sudore, MD**

Jana Powell

Clarissa Ferguson

# Preventing the Need for Conservatorship in Older Adults: A Medical-Legal Partnership Perspective

## Health systems:

- Motivated
- Have data
- Need information
- Need tools and workflows

## Elders:

- Need upstream engagement
- Need information
- Need skills, not just forms

## Legal aid and other social services:

- Need opportunities to reach clients further upstream
- Need tools that are stakeholder and evidence-informed

# Clarity Website

Clarity

Idioma/Language ▾

Sign In

## Welcome!

It is time to plan for financial and legal needs later in life.

Play the video or scroll down to learn more.

02:00

Get Started ▶

### Who is Clarity For?

Clarity is for anyone who may need help managing their finances someday. That is just about everyone.

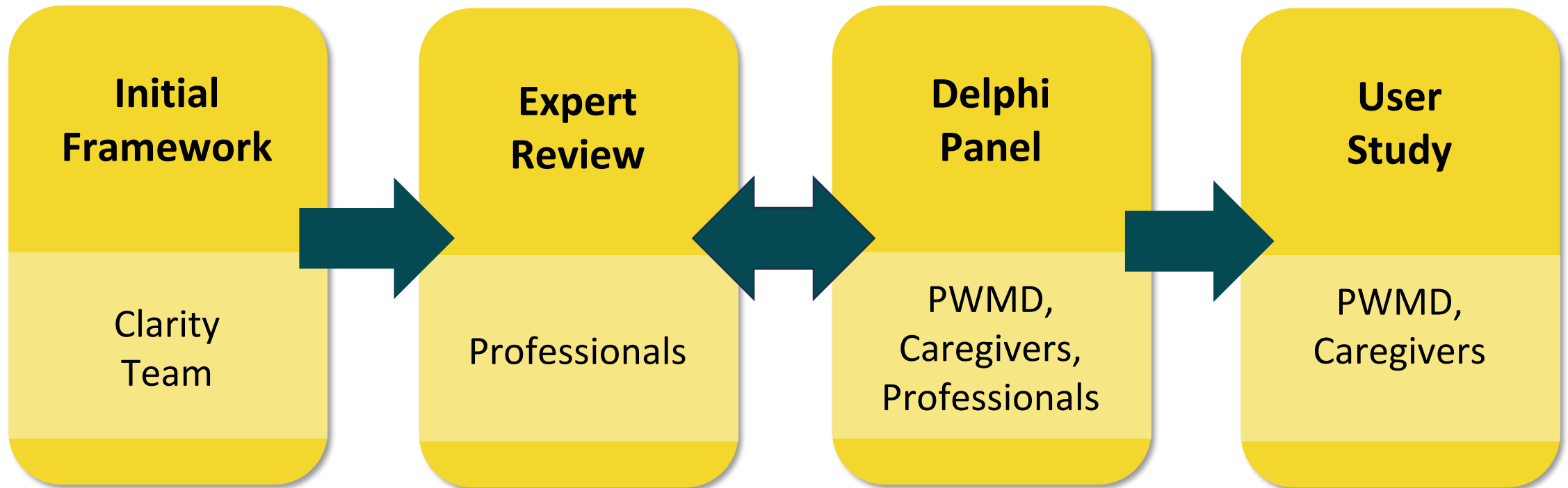
Clarity is also for **caregivers** who help someone manage their finances and care.

# Goals/Principals

- Stakeholder-driven
- Accessible + inclusive
- Comprehensive
- Evidence-informed
- Free to public
- Process-focused: not a document completion service
- Facilitates linkage to aging network



# Clarity Development Process



# Delphi Study

## 15 Participants

- 4 health professionals
- 4 legal professionals
- 4 caregivers
- 3 people with memory difficulties

63% F, 37% M

37% non-white

## Consensus Findings

- Covers the right information
- Will increase awareness and understating of financial/legal planning
- Will improve knowledge and communication skills
- Will help prevent issues with planning
- Will help talk with others about planning, including family, lawyers, doctors and others
- Beneficial to anyone as they age (beyond dementia)
- PWMD will use with someone they trust/help
- PWMD could use independently

“Real relevant for everyone, whether you have memory difficulties or are a caregiver. Relevant for aging seniors, period.”

Caregiver

“We would incorporate it into our work as a piece of caregiving and wellness. Clarity assists with Financial Wellness.”

Medical  
Professional



“After I have a conversation with a client, I would direct them to a site like Clarity to reinforce the conversation I had with the client. I would even visit the site with them to explain their options.”

Legal  
Professional

# Clarity Tool Live: Planforclarity.org

Clarity

Idioma/Language ▾

Sign In

## Welcome!

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02:00

Get Started ▶

### Who is Clarity For?

Clarity is for anyone who may need help managing their finances someday. That is just about everyone.

Clarity is also for **caregivers** who help someone manage their finances and care.

# Clarity Content

- Why Plan
- Naming Financial and Legal Caregivers
- Planning for Future Care
- Getting Legal Help
- Talking with Others
- Resources
- User Information and Next Steps

The screenshot shows the Clarity website home page. At the top right, there is a language selection dropdown labeled "Idioma/Language" and a yellow "Sign In" button. Below the navigation bar, the text "Home Page" is centered. A prompt reads: "Click a topic below to learn about it. Scroll to the bottom for your information." There are seven topic cards arranged in two rows. The first row contains: "Why Plan" (with an illustration of a woman with question marks), "Naming Financial and Legal Caregivers" (with an illustration of a woman on a video call), and "Planning for Your Future Care" (with an illustration of a person at a desk with a checklist). The second row contains: "Getting Legal Help" (with an illustration of a group of people), "Talking With Others" (with an illustration of two people in a meeting), and "Other Resources" (with an illustration of a person on a video call). At the bottom, there is a larger card for "My Information" which includes the text: "Go here to see all of your Clarity information." and "Download a report to save or share. See recommended next steps."

# Information

- Convey needs and risks
- Increase knowledge
- Develop skills

The screenshot shows a web page with a dark teal header containing the Clarity logo, a 'Go Home' button, and a 'Sign In' button. The page title is 'Why Plan'. On the left is a vertical navigation menu with options: 'Introduction', 'Why Making Plans Is Important' (highlighted), 'When To Make or Update Plans', 'How Legal "Capacity" Affects Planning', 'What Can Happen If You Do Not Make Plans Now', 'Key Steps to Planning', and 'Who Should Be Involved in Your Planning'. Below the menu is a 'California' dropdown menu. The main content area features the article 'Why Is Making Financial and Legal Plans Important? (1A)' with a 'Listen' button. The article text discusses the need for support and lists key points for getting good support. A list of reasons for making plans in advance is provided, followed by a list of things to plan ahead for. An illustration shows two people sitting in armchairs talking. At the bottom, there is a 'Next Page' link and a 'Go to Next Page' button.

## Why Is Making Financial and Legal Plans Important? (1A)



Like most people, you will need support from other people you trust at some point in your life. This support is likely to include help managing financial and legal matters – especially as you age or if you have a serious illness. Having that support will help you meet your goals and live the life you want.

**The key to getting good support is making sure people know what your wishes and goals are.**

By making financial and legal plans in advance, you can help others:

- Understand what you need and want in your life
- Know what they can do – or not do – to support you
- Reduce stress and avoid future confusion

Planning ahead includes things like:

- Choosing your financial and legal caregivers
- Understanding and planning for the cost of your health and long-term care needs
- Working with a lawyer to create legal documents that protect your rights and let others know your wishes



Many people think that making financial and legal plans is only about planning for death. That is not true. Many of us will live a long time with the support of others, and plans are needed for that lifetime support.


Next Page: When To Make or Update Plans

Go to Next Page

# Communication Skills

- Promote and normalize communication about financial and legal issues
- Improve skills
- Increase self-efficacy

Talking With Others



Talking With Others

## Discussing Goals and Choices


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Sharing YOUR Choices

Your choices should be written down in legal documents, but you ALSO need to explain your choices to your financial and legal caregiver(s). You may also need to tell some family and friends. Telling people decisions that follow your

tion with others. The lawyer  
n others as the next step.  
gical document completed  
want to just tell who you

Aaron Talks to His Dad Bill ✕




02:27

Show Video Script

# Action


- Explain and help organize individualized next steps
- Offline tools to assist with continued planning

## Planning to Pay for Long-Term Care



This worksheet can help you gather information that you will need in order to plan to pay for long-term care. You can think of it as an inventory.

**There are 7 steps in this worksheet.** You do not need to complete them all at one time.



**Step 1** Estimate how much long-term care might cost you

**1** Have you talked to your doctor about the types of care you might need in the future?

Yes     No

If you answered no, it is a good time to talk to your doctor about the types of long term-care you might need, given your medical conditions.


**2** Do you know the cost of long-term care where you live?

Yes     No

If you answered no, contact your local Area Agency on Aging (AAA) to find a free, trusted resource for this information.

You can make notes about costs in your area here:

- In-home caregiver: \$ per hour
- Assisted living: \$ per month
- Nursing facility: \$ per month



65



## My Goals & Values



This is a worksheet to help you think about what matters most to you in managing your money and property.

You can share this worksheet with other people, such as someone you have chosen to help you manage finances, a lawyer, or a financial planner.

**It is important to know that this is not a legal form.**

To give your wishes legal power, you need to put your wishes in legal forms recognized by your state.

### What are Examples of Decisions About Money and Property?

- Paying bills, mortgage or rent, utilities
- Health care
- Long term care
- Pets, belongings
- Buying clothes or food you like
- Moving or selling your house
- Selling your car if you can not drive it
- Investments
- Entertainment, travel
- Giving gifts or donations
- Paying for transportation, like cabs, the bus, or people to drive you
- Opening or changing bank accounts, or moving money around
- Managing money for others, such as a spouse, child, or grandchild



### Bob's Story Part 1



Bob is a 70-year-old who lives with his spouse at their home.



One winter day, Bob was getting ready to go to the grocery store when he slipped and fell on an icy step on his front porch.



Bob suffered a broken wrist and hip and went to the hospital.



After having surgery, Bob suffered from an infection.



After Bob recovered from the infection, the hospital transferred Bob to a skilled nursing facility.



Bob now needs weeks of intensive physical therapy.

### What Would You Do?

- 1 How would you pay bills if you could not do it yourself?  
\_\_\_\_\_
- 2 How would you get to physical therapy appointments, if you could not drive yourself?  
\_\_\_\_\_
- 3 Are there pets, children, or others who would need care while you were sick?  
\_\_\_\_\_
- 4 How would you get meals or chores done around the house while you are getting physical therapy?  
\_\_\_\_\_

You can write down more thoughts here:

\_\_\_\_\_  
\_\_\_\_\_

# Linkages

- Facilitate connections with legal and other support professionals
- Principles:
  - Connection to state area agencies on aging
  - Limit number of resources
  - No referrals to paid services





# Accessibility, Literacy, Language

- Plain language
- Simple, easily-understood interface
- Visual aids and videos
- Cognitive-aware design (memory aids, repeated info, minimal distraction)
- Functions and tools to support shared usage and offline continuation
- Spanish (additional languages planned)



# User Study

Surveys (target n 30) and one-on-one interviews (target n 15) to identify changes and additions to improve usability and acceptability.

## Preliminary Findings:

**29** enrolled

- 20 BIPOC
- 8 White
- 1 Unknown

**20** completed survey

- 13 caregivers
- 7 PWMD

- Highly usable — SUS usability score over 80%
- High self-efficacy after use
  - Mean 4.5/5 confidence in using the website
  - Mean 4.1/5 increased confidence in financial and legal planning
- Likely to share with others, especially with family and friends
- Most users had thought about or discussed F&L planning (65%) but not started (30%) or finished (25%) legal planning documents

# How We Think This Can Be Most Helpful

- Integrated into professional workflows
  - Case managers/Care coordination/ ECM
  - Primary care
  - Legal aid
  - APS
- Integrated into community supports
  - e.g. Friendship line
- Available as resource on webpages- GREAT but less targeted to highest need elders

# Next Steps

## 2024

- Finalize UE Study
- Adding videos
- Updating legal content
- Dissemination and partnerships

## Future

- Expanded content and formats (populations and topics)
- National dissemination
- Efficacy/outcomes study

# Clarity



**Thank You!**

**Contact:** [hoopers@uclawsf.edu](mailto:hoopers@uclawsf.edu)

**Research Study:** [study.planforclarity.org](http://study.planforclarity.org)

# Committee Questions and Discussion

# 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](mailto:EngAGE@aging.ca.gov)



# Closing Remarks

*Sarah Steenhausen*

*Deputy Director, California Department of Aging*



# Meeting Materials & Future Dates

- ❖ **All meeting materials, transcript and recording are posted after this meeting on:**
  - [CalHHS EDJCC Meeting webpage](#)
  
- ❖ **Future 2024 EDJCC meetings:**
  - Thursday, August 8, 2024: (10 a.m. – 1 p.m.)



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