

# Evaluation of the California Department of Aging's Local Aging and Disability Action Planning (LADAP) Grant Program

Progress Report

Reporting Period: July 1, 2023 – January 31, 2024

Submitted by the Family Caregiving Institute, February 29, 2024

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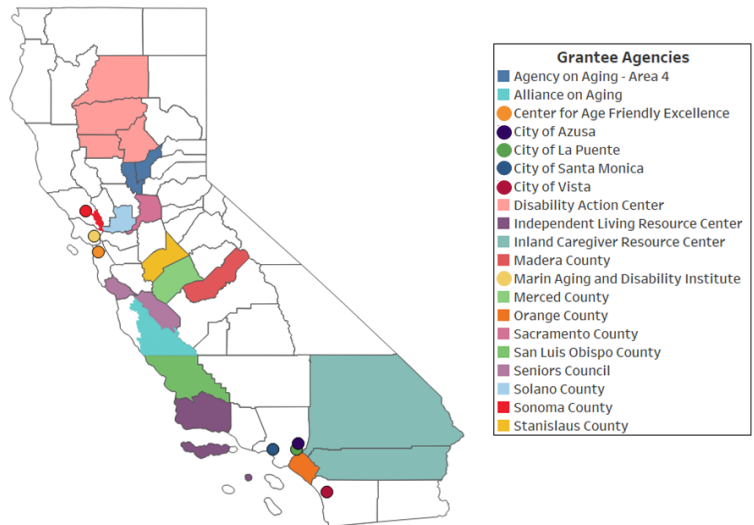
## Acknowledgements

This work is a collective effort with many dedicated individuals sharing a vision and contributing their time, energy, and effort to develop Local Aging and Disability Action Plans. We want to acknowledge the LADAP grantees and their representatives who took the time to participate in focus groups, learning labs, and office hours, and complete surveys and progress reports. Furthermore, evaluation and technical assistance activities were guided by Jackie Siukola Tompkins and Carroll De Andreis from the California Department of Aging.

## Executive Summary

The vision of the California Department of Aging (CDA) is “an age and ability friendly California where we choose where and how we live throughout our lives.” CDA’s Local Aging & Disability Action Planning (LADAP) Grant Program seeks to support local communities in planning for and addressing the needs of California’s older adults, people with disabilities, and professional and family caregivers of today and tomorrow. The Budget Act of 2022 allocated \$4.5 million one-time General Fund dollars over three years (fiscal years 2022-25) to CDA to support this grant program. Twenty-one grant applications (15 in Phase 1 and 6 in Phase 2) were selected to receive up to \$200,000 each to support LADAP initiatives within their local community, defined as a city, a group of cities, a county, a group of counties, or Tribal land(s).<sup>1</sup> CDA contracted with the University of California, Davis - Betty Irene Moore School of Nursing, Family Caregiving Institute (UC Davis FCI) to conduct an evaluation of the LADAP Grant Program.

Of the 20 agencies who received funding, eight identified as County governments, four identified as city governments, and eight identified as non-profit organizations. Two grantees applied as consortia of organizations. The grantees represent diverse geography, varied catchment areas, population density and demographic characteristics.



Baseline analysis of six major LADAP objectives revealed that grantees were in different starting places, as expected. About half had already initiated community awareness, six had established a local Advisory Committee, about half had engaged community leaders and elected officials, and 16 had identified existing data to inform their community assessment while others plan to engage the community to assess needs and priorities. Priorities align with either the California Master Plan for Aging five bold goals or the AARP eight Domains of Livability. Grantees are ambitious in their planning, identifying an average of 10 primary priorities with a range of 4 – 22. We anticipate that priorities will solidify as the grantees complete community needs assessments and address feasibility. Grantees have identified a variety of sustainability strategies, including creating lasting awareness of aging and disability issues, changes to programs, securing additional funding, assuring accountability, and monitoring progress. CDA and UC Davis offer both technical assistance and office hours, building capacity for action and forming a learning community across the state. Grantees have been highly engaged in these resources.

In summary, 20 grantees have commenced planning in diverse communities across California. Their plans are being formulated in consultation with their communities and they are already contemplating sustainability. We recommend uniform reporting, supporting disability inclusion, and offering ongoing engagement and technical assistance to enable grantees to develop feasible, actionable, achievable, and sustainable plans that address local priorities.

<sup>1</sup> One agency, the Marin Aging and Disability Institute (MADI), received funding in both Phase I and Phase II.

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## I. Introduction

### LADAP Grant Program Introduction

The vision of the California Department of Aging (CDA) is “an age and ability friendly California where we choose where and how we live throughout our lives.” CDA’s Local Aging & Disability Action Planning (LADAP) Grant Program seeks to support local communities in planning for and addressing the needs of California’s older adults, people with disabilities, and professional and family caregivers of today and tomorrow.

The LADAP Grant Program is a planning and capacity-building grant program focused on supporting communities and populations that have been historically under-resourced and under-served. The Budget Act of 2022 allocated \$4.5 million one-time General Fund dollars over three years (fiscal years 2022-25) to CDA to support this grant program and enable communities across California to plan and develop their own local age- and disability-friendly plans. The goals of the LADAP Grant Program align with California’s Master Plan for Aging (MPA), CDA’s Strategic Plan, Governor Newsom’s Executive Order (EO) on equity (EO N-16-22), and the guiding principles and strategic priorities of CalHHS.

Twenty agencies received funding to support LADAP initiatives within their local community, defined as a city, a group of cities, a county, a group of counties, or Tribal land(s). Fifteen grantees were funded in Phase I, launched on July 31, 2023, and six grantees were selected to receive funding during Phase II, set to launch on February 28, 2024.<sup>1</sup> The LADAP grant program will conclude in March 2025.

### Evaluation Goals

CDA contracted with the University of California, Davis - Betty Irene Moore School of Nursing, Family Caregiving Institute (UC Davis FCI) to conduct an evaluation of the LADAP Grant Program. The overall goals of the evaluation include:

1. **Document the implementation process** including lessons learned and promising practices.
2. **Evaluate the direct impact** of the program on participants, partners, communities, and policy.
3. **Identify early successes and lessons learned**, particularly insights on **common goals** across multiple grantees.
4. **Provide a recommended follow-up evaluation plan.**
5. **Recommend strategies for long-term sustainability.**

In this first progress report, we provide a detailed picture of the starting points for diverse grantees. A strong understanding of each grantee’s baseline will foster appreciation of the implementation process’s context and the extent of the program impact over the grant. Specifically, this report will cover characteristics of the lead agencies and their communities and existing efforts and resources that align with their proposed projects. We explore the priorities grantees hope their Local Aging and Disability Action Plan (from here on out referred to as “Local Plan”) will address, and how they envision sustaining these efforts beyond the CDA-funded grant period. Additionally, this report describes grantees’ engagement with technical assistance offered by the UC Davis FCI and CDA through Office Hours and Learning Labs. The report concludes with recommendations.

<sup>1</sup> One agency, the Marin Aging and Disability Institute (MADI), received funding in both Phase I and Phase II.

## II. Evaluation Design and Methods

The evaluation plan was developed by researchers at the UC Davis FCI in collaboration with CDA staff and with input from national experts who evaluate and support Age Friendly Community initiatives. The UC Davis FCI team also subcontracted experts in the School of Social Work at Rutgers, The State University of New Jersey, who bring experience developing surveys specific to age-friendly initiatives, providing rigorously tested tools for this evaluation and consultation in data interpretation. The evaluation includes multiple data sources and methods.

### Data Collection

This progress report includes information gathered between July 1, 2023, and January 31, 2024. Table summarizes the data sources for this report.

*Table 1: Evaluation Data Sources Informing this Report*

Data Source	Focus	Participants	Included in this Report
Grant applications	Grant progress	All	Phase One: received from CDA June 2023 Phase Two: received from CDA December 2023
Grantee Pre-Surveys	Site project plans and progress, and sustainability goals	All	Phase One: Collected September 2023
Attendance records from office hours and learning labs	Grantee engagement	Grantees and their representatives	Phase One: Office Hours and Learning Labs offered between September 2023 through January 2024

**Grant Applications.** Grant applications include fifteen from phase one (received in June 2023) and six from phase two (received in December 2023).

**Grantee Pre-Surveys.** A Qualtrics survey captured baseline status of select LADAP objectives and activities, likely priority areas for Local Plans, and sustainability plans.

**Records from Office Hours and Learning Labs.** Grantees were offered technical assistance through virtual monthly Office Hours and bimonthly Learning Labs. Attendance was optional but encouraged. From September 2023 through January 2024, we held five Office Hours and two Learning Labs. The CDA team sent out calendar invitations and emails and managed Zoom logistics. The UC Davis FCI Team developed the agendas and topics with input from CDA.

Learning Labs provided structured opportunities for grantees to connect with and learn from one another. The general format included:

- Welcome & Introductions
- Lightning Round Presentations/ Community Spotlights
- Resource Sharing
- Breakout Rooms
- Report Back & Conclusion

Learning Labs were recorded, and a post-survey was sent out to those who attended to capture feedback on the session.

Office Hours were less structured. Grantees were encouraged to send in questions in advance and bring up questions for discussion during the meeting.

CDA shared registration records and feedback surveys with the UC Davis FCI team to inform evaluation.

## Data Analysis

**Grant Applications.** Grant applications were imported into Dedoose, coded, and analyzed using qualitative descriptive methods to summarize characteristics of the grantees and their communities, their aspirations, and plans.

**Grantee Surveys.** Quantitative data were analyzed using descriptive statistics. We present summary statistics, tables, and graphs to display the findings.

**Records from Office Hours and Learning Labs.** Registration records and feedback surveys from the Office Hours and Learning Labs were analyzed using descriptive statistics.



### III. Preliminary Findings

#### Description of Grantees

##### **Grantee Types**

The LADAP RFA described four types of agencies that were eligible to receive LADAP funding: Local government agencies, Tribal organizations, Non-government organizations, or Community-based non-profits and established coalitions that are classified as 501(c)(3) tax exempt under the Internal Revenue Services (IRS) Code. Grant applications were welcomed from single organizations or a consortium of organizations, the latter of which required a signed letter from all organizations within the consortium.

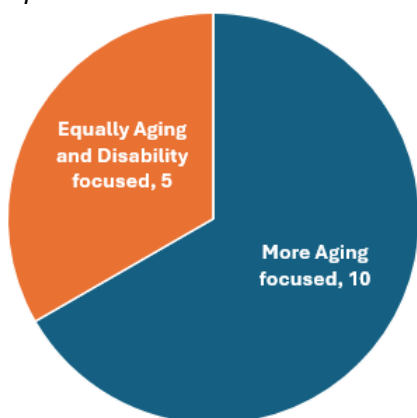
Of the 20 grantees who received funding, eight identified as County governments, four identified as city governments, and eight identified as non-profit organizations as shown in Figure 1. Among the County Governments, four identified as Area Agencies on Aging (AAA). Among the eight non-profit organizations, two identified as an Independent Living Center (ILC), one as a Caregiver Resource Center (CRC), and two as AAAs. None of the grantees identified as a Tribal organization.

Two grantees applied as consortia of organizations:

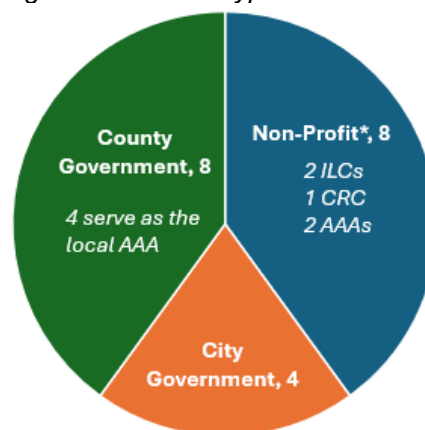
- Santa Barbara Aging & Adult Network (AAN) (Lead agency: Independent Living Resource Center, Inc. (ILRC))
- The Aging and Disability Resource Connection (ADRC) of Yuba-Sutter (Lead agency: Area Agency on Aging Area 4 (AAA4))

In the pre-survey, Phase I grantees were asked if their agency was more aging-focused or disability-focused. Two-thirds described their agency as being primarily aging-focused, and one-third said they were equally aging and disability focused (see Figure 2).

*Figure 2: Grantee Aging and Disability Expertise*

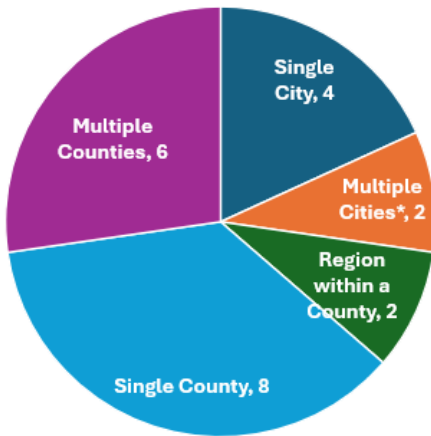


*Figure 1: Grantee Type*



*\*The Marin Aging and Disability Institute (MADI) is a non-profit organization that received two LADAP grants (Phase I and II), therefore they were only counted once.*

Figure 3: Region of Focus



\* MADI was included as one grantee under 'multiple cities.'

### Community Composition

The LADAP RFA required applicants to serve a defined community. The grantees described focusing on various geographies, ranging from one town or city to multiple cities, a region within a county (including unincorporated areas), one county, or multiple counties as shown in Figure 3.

Overall, grantees represent a mix of geographic size and are based in diverse regions of the state (see Figure 4). While Tribal Lands were mentioned as overlapping with some county or multi-county regions, none of the grantees are specifically focused on Tribal Land(s). Grantees plan to focus their planning efforts on a mix of urban, suburban, and rural areas.

Figure 4: Map of LADAP Grantees (includes Phase I and II)

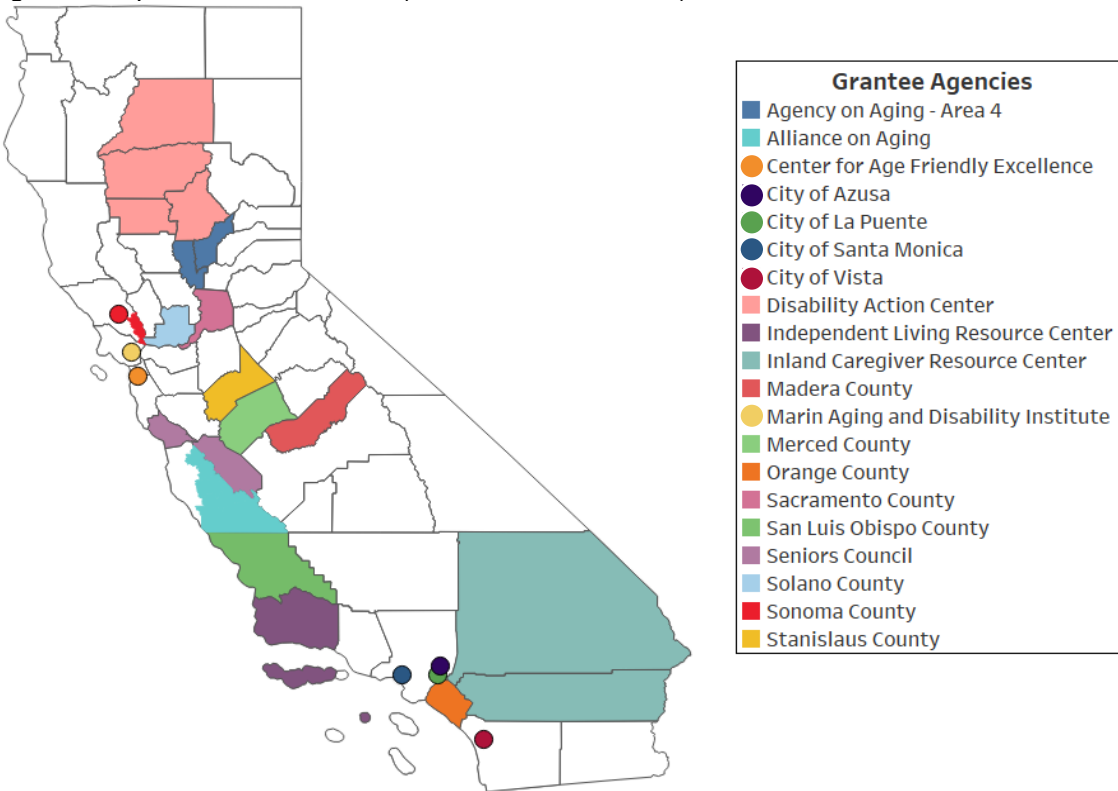


Figure 5 showcases the diversity in population size within each grantee's area of focus, and Appendix A provides further detail of each grantees' region of focus, geographic area, and population density. The Inland Caregiver Resource Center is leading planning efforts for the largest geographic region (27,277 sq. miles) and the largest population (4.5 million residents).

The region covered by the Disability Action Center is the second largest (9,675 sq. miles), but due to its inclusion of frontier and rural areas, their population size is significantly less (485,000). In contrast, Orange County covers a much smaller geographic area (948 sq. miles), but the population is extremely dense (3.2 million residents). The Cities of Azusa and La Puente and the Marin Aging and Disability Institute are engaging the smallest populations. In total, the LADAP Grant program covers 57,303 square miles and will impact 13,378,616 residents (2020 Census).

Figure 5: Variation in Size of Population Reached by Grantee



We anticipate that the region of focus will influence LADAP planning and implementation. For example, grantees who focus on one city may be able to achieve greater community saturation in their community needs assessments, while those focused on larger geographies may need to engage a representative sample or make choices to focus on subpopulations within their region. Grantees covering multiple cities or multiple counties may encounter added challenges of engaging elected officials across borders, requiring collaboration while balancing different budgets, staffing structures, and voter priorities.

While the RFA calls for each grantee to develop one Action Plan, some grantees plan to produce multiple plans. For example, the Center for Age Friendly Excellence is working with four cities and plans to produce four separate plans; Seniors Council plans to create separate plans for Santa Cruz and San Benito Counties; and Sonoma County is considering developing one plan for the City of Santa Rosa and a second plan for the Sonoma Valley. These grantees have ambitious goals, exceeding RFA requirements.

## **Demographic Composition & Language Needs**

Grantees described various demographics in their community, including the percent of older adults, percent with disabilities, racial and ethnic composition, sexual orientation and gender identity, income, English proficiency, immigration status, health insurance status, and prevalence of veterans. Because these demographic statistics were self-reported, they were taken from various sources across different reporting years. These demographic characteristics were included as either a percent of the total population, percent of adults aged 60+ or 65+, or whole numbers.

The disability composition was similar across grantees, ranging from 6% to 13% of the total population. While most grantees reported the proportion of disability out of the total population, a few reported it out of adults aged 65+ or of adults aged 65 or under. The grantees with a higher percentage of disability include Merced, Stanislaus, and Sacramento Counties, the Inland Caregiver Resource Center (focusing on Riverside and San Bernardino Counties), and the Marin Aging and Disability Institute (both the Town of San Anselmo and the City of Novato).

The age composition of communities varied considerably across grantees, ranging from 17% to 30% for residents aged 60+, and 11% to 22% for residents aged 65+. Most grantees reported the percentage of older adults defined as age 65+ or age 60+, but a few grantees also used age 50+, 55+, or 85+. Out of 20 grantees, five grantees had a higher prevalence of older adults, including San Luis Obispo, Sonoma and Stanislaus Counties, Marin Aging and Disability Institute (both the Town of San Anselmo and the City of Novato), and Independent Living Resource Center (focusing on Santa Barbara County).

Racial and ethnic composition also varied. Shasta and Sonoma Counties, the City of Pacifica, and the City of Novato reported that most of their residents are non-Hispanic White, while the Cities of La Puente, East Palo Alto, and Merced County reported an extremely diverse population. La Puente residents are 84% Latinx and 13.5% Asian; East Palo Alto residents are 60% Latinx, 13% AAPI, and 11% Black; and Merced County are 63.2% Hispanic/Latinx, 8.0% Asian, 4.0% Black/African American, and 2.6% American Indian/Alaskan Native.

Grantees described how they would tailor their LADAP outreach to engage diverse subpopulations, for example, by offering materials and leading presentations in multiple languages, braille, and sign language, and partnering with organizations who have existing relationships with diverse constituencies. Some grantees plan to conduct LADAP community outreach and engagement in multiple languages. For example, the Alliance on Aging described expecting to do outreach to Oaxacan residents that speak indigenous languages, and Sacramento shared that their top 10 languages include English, Spanish, Chinese, Russian, Tagalog, Hmong, Vietnamese, Hindi, Punjabi, and Ukrainian.

## **Scope of Project - Different Starting Places**

Grantees are expected to focus on six objectives during the LADAP grant program. These six objectives build upon CDAs Local Playbook (<https://mpa.aging.ca.gov/LocalPlaybook/>), a step-by-step guide for local communities to develop local plans that complement the statewide California Master Plan for Aging (MPA). The LADAP RFA describes these six objectives in detail, and a summary is provided below in Table 2.

Table 2: Summary of LADAP Objectives

<b>Objective #1: Awareness Stage: <i>Build Community Awareness</i></b>
Build community awareness about the benefits of planning and developing a cross-sector action plan to meet current, emerging, and future aging and disability-related needs.
<b>Objective #2: Planning Stage (Play One of the Local MPA Playbook): <i>Establish an Advisory Committee and Gain Community Leader Support</i></b>
Form a local Advisory Committee that represents the community's diversity, key community champions, local leaders and decision-makers, and cross-sector leadership.
Engage regularly with local leaders and local elected officials to garner support and align the Local Plan work to other community priorities, goals, and initiatives.
Apply for and enroll in the AARP Network of Age Friendly States and Communities.
<b>Objective #3: Planning Stage (Play Two and Three of the Local MPA Playbook): <i>Community Assessment and Cross-Sector Engagement</i></b>
Gather existing relevant, region-specific data and planning documents related to the five Master Plan for Aging bold goals (Housing for all ages and stages; Health reimagined; Inclusion & equity, not isolation; Caregiving that works; Affording aging).
Plan, coordinate, and conduct accessible and culturally responsive and linguistically appropriate community assessment activities to understand the community's needs and identify community assets and gaps and establish a baseline.
<b>Objective #4: Planning Stage (Play Four of the Local MPA Playbook): <i>Select your Goals and Priority Initiatives, and Develop a Local Plan</i></b>
Facilitate planning and priority-setting meetings and convenings to develop a cross-sector, community-driven, and action-oriented Local Plan that improves a community's livability for people of all ages and is centered on equity, cultural competency, community engagement, and disability inclusion strategies.
<b>Objective #5: Development Stage (Play five of the Local MPA Playbook): <i>Build your Local Plan</i></b>
Draft and finalize a Local Plan with a clear scope of work with goals, objectives, strategies, resources/inputs, and evaluation measures to support the priority initiatives identified with community partners.
Obtain final support and approval of the Local Plan by an elected official or governing body.
<b>Objective #6: Early Implementation: <i>Approve, Publicly Release, and Promote the Local Plan</i></b>
Publicly release and promote the Local Plan.

The LADAP RFA required applicants to describe past, current, and planned work that aligned with the goals of the grant program that could be leveraged. In addition, grantees described their workplan to implement the six LADAP objectives. While some grantees described extensive previous efforts that could be built upon for their LADAP initiative, other grantees lacked this previous experience. Assessing grantees' self-described experience and proposed plans, as described in their grant application narratives that align with Objective 1, 2, and 3, enables an understanding of starting points and will contextualize future reports that describe collective and individual accomplishments during the LADAP grant program.

### ***Objective 1: Build Community Awareness***

To “Build Community Awareness” encompasses information and education opportunities to share the benefits of planning and developing a cross-sector action plan to meet current, emerging, and future aging and disability related needs.

Similarities: At the time of their grant proposal submission, 11 grantees reported on awareness activities that had already taken place. 10 grantees reported that their awareness activities were in a planning phase, with seven of these giving little detail but committing to address the objective.

Differences: Of the 11 grantees that described previous efforts to build community awareness about efforts to develop a Local Plan:

- Nine had held MPA or LADAP awareness events (either in-person or virtual), typically drawing 100+ attendees.
- Two described regularly engaging in community outreach or meetings.
- Two issued press releases.
- Three have public-facing websites or online platforms focused on their Local Plan.

Of the ten grantees in the planning phase, two gave detailed plans to draw on the experience and support of existing partner networks, and one described a planned community event to raise awareness.

Unique Cases: One grantee in the planning phase noted that their plan includes strategies to target traditionally underrepresented populations in their communities, including culturally oriented events and incentives for attendees.

### ***Objective 2: Establish an Advisory Committee***

A primary component of Objective 2 is the formation of a local Advisory Committee as a decision-making body that meets regularly to guide the LADAP initiative. This committee should include cross-sector leadership and diversity of perspectives through representation by various key community champions, local leaders, and decision-makers.

At baseline, six of the grantees reported that they already have an Advisory Committee in place which can advance the Local Plan, and a further eight grantees reported the existence of steering committees, workgroups, or task forces in their region which will be leveraged to create the MPA or LADAP Advisory Committee (either by inviting a subset of those team members to become the Advisory Committee, or by inviting additional members to expand those teams into the Advisory Committee).

Among the eight grantees in the active phase of Advisory Committee formation, one reported that they had secured the commitment of elected officials to participate in the Advisory Committee and named a staff member who would preside over the meetings.

Three grantees detailed their plans to form their Advisory Committees, intending to do so through invitations to cross-sector leaders of collaborating agencies. They described strong existing partnerships or networks among the cross-sector agencies.

Four grantees reported a commitment to form an Advisory Committee but did not offer a detailed plan in their grant application narrative.

Unique Cases: One grantee in the planning phase described a desire to deviate from their usual approach to the formation of such a committee, in a concerted effort to bridge a racial divide that has historically led to the disenfranchisement of underrepresented groups in their region.

***Objective 2: Gain Community Leader Support***

Another component of Objective 2 is to engage key community champions, local leaders and decision-makers, and cross-sector leadership.

Similarities: Twelve of the grantee organizations reported that they are currently members of local coalitions or community partner networks, and they have committed to incorporating the participation of those partners into their LADAP plans to establish engagement of community members and leaders.

Differences: Among the nine grantee organizations that did not describe existing local coalition partnerships, their relevant past, current, and planned work to support this objective varied widely. A few grantee organizations plan to partner for the first time with an existing local advocacy coalition, to engage them in LADAP efforts.

Some grantees described other existing infrastructure (e.g., community organizers) to regularly reach out directly to community residents to offer information, services, and support, which the grantees will now leverage for LADAP. Some grantees have programs or initiatives which provide transportation for community members to attend community meetings (e.g., city council meetings) and can facilitate this engagement. Three of the grantees did not describe any existing infrastructure to address this objective.

Unique Cases: One grantee reported that they have previously held candidate forums during elections to foster discussion between constituents and representatives. A second grantee reported that they hold regular meetings and invite regional decision-makers to contribute. Another grantee described plans to use local directories to target potential community leaders to solicit support for LADAP efforts.

***Objective 2: Engage Local Elected Officials***

Another component of Objective 2 is to “engage regularly with local elected officials to garner support and align the Local Plan to other community priorities, goals, and initiatives.” Elected officials include members of the Board of Supervisors, City Council, Tribal governing body and the City Mayor (or City Manager on behalf of the Mayor). Support from elected officials is also necessary for the AARP Age Friendly Community Network of States and Communities application.

Similarities: Grantee applications represent two distinct starting points with concern to engaging elected officials. Eleven grantee applications included one or more letters of support from elected officials. Ten grantee applications included no letters of support from elected officials.

Differences: There is nuance amongst grantees within these two distinct starting points. Six grantee applications included more than one letter of support from an elected official. Some included multiple Board of Supervisor members, some included a combination of a Board of Supervisor member and a Mayor or City Manager. Seven grantees explicitly indicated having elected officials on an Advisory Board, Steering Committee, or other formal group helping to spearhead the LADAP initiative. The elected officials in four cities (represented by 2 separate

grantees), voted to pass age friendly resolutions. Elected officials from an additional city are moving towards instating an Aging and Disability Friendly program.

Of the 10 grantees who did not receive letters of support from elected officials:

- Three have indicated having an elected official on an Advisory Board, Steering Committee, or other formal group helping to spearhead the LADAP initiative.
- Five have presented at a meeting or held an event with elected officials in attendance focusing on the Master Plan of Aging, LADAP, or aging in general.

Unique Cases: One grantee indicated that the Board of Supervisors appointed members of their Advisory Board, Steering Committee, or other formal group helping spearhead the LADAP initiative. This grantee did not include letters of support from the Boards of Supervisors though. A second grantee described that their local elected officials are receptive to developing an aging plan—the grantee believes the needs assessment findings will help solidify this support. Another grantee indicated their Board of Supervisors approved to conduct a comprehensive healthy aging assessment.

### ***Objective 2: Enroll in the AARP Network***

Another key component of Objective 2 is to enroll in the AARP Age Friendly Network of States and Communities. This network is part of the World Health Organization Global Network of Age Friendly Cities and Communities. Membership indicates that elected leadership has officially committed to working towards making their town, city, county, or state a great place to live for all ages. Joining the network is the first step in a multi-step process that includes submitting an action plan and progress reports.

At the time of application, 5 communities were already members of the Age Friendly Network, 13 communities had yet to apply, and one community had a pending application. Of the five communities who were already members, one became a member in 2016, two became members in 2019 and one in 2021.

Of the towns and cities that are participating in the LADAP grant program, several are within counties that are already part of the Age Friendly Network.

Unique Cases: One grantee indicated that they had already joined the Age Friendly Network, but upon further inspection, they were part of the World Health Organization Global Network (since 2017) but not part of AARP's Age Friendly Network. There may be further benefit for them to join the AARP network to gain US-specific support.

One grantee covers four cities with their LADAP funding. Of these cities, two are in progress and two have received extensions to complete their action plans. Another grantee applied to join the AARP Network in 2019 and was granted an extension to complete their action plan.

### ***Objective 3: Conduct Community Needs Assessment***

A key component for Objective 3 is to conduct a community needs assessment by reviewing existing local age-friendly models, gathering existing community specific data, collecting accessible and culturally responsive assessment activities, creating a report, and making this report publicly available. These assessment activities may include focus groups, listening sessions, town halls, interviews, and/or surveys.

Similarities: Grantee applications represent three distinct starting points with concern to conducting their needs assessment. First, there are 4 grantees that, while they may have



discussed plans for a forthcoming needs assessment, they have not already collected data nor identified specific existing data sources. The second starting point consists of one grantee who held a community forum to identify key goals within their community. The third starting point consists of 16 grantees who have either identified existing data sources they can use to support their needs assessment or have previously conducted needs assessments they plan to reference.

Differences: There is nuance amongst grantees within these three distinct starting points – particularly among those who have identified existing data sources to support their needs assessment or have already conducted an aging focused community needs assessment.

Eight grantees have specifically identified existing data sources that can help in their needs assessment. Examples of sources indicated are census data, area plans, mobility plans, general plans, housing plans, various indexes, tribal health/aging surveys, and provider usage data. Of this group, five grantees have indicated previously collected needs assessment data that can also be used to examine aging focused community needs. Two grantees indicated they can use data collected through providers or agencies.

Eight grantees have indicated they have begun or already completed interviews, focus groups, listening sessions and/or town halls as part of their aging focused community needs assessment. One of these grantees expects to be completed with their in-progress needs assessment by early Spring 2024.

Some grantees explicitly identified existing data that can be used in their needs assessment, and some have an age friendly community needs assessment conducted (or in progress) based on interviews, focus groups, listening sessions, or town halls.

Unique Cases: One grantee held a public forum and identified 2 key goals for the LADAP initiative in their community. A second grantee had a planned needs assessment, but the pandemic stay-at-home orders inhibited participant recruitment. Another grantee indicated they will be using recently collected AARP Age Friendly Community surveys as part of their needs assessment.

## Priorities the Local Plans Will Address

### ***CDA Guidance on Priorities***

The LADAP grant program requires each community to develop a Local Plan. The RFA clarifies that the Local Plan should address “the social drivers of health, which may include, but not limited to, the following:

- Accessible Housing and Homelessness
- Transportation
- Public Health
- Health Care Quality and Access
- Direct Care Workforce
- Friends and Family Caregiving Support
- Social Engagement, Inclusion, and Community Safety (e.g., digital inclusion, intergenerational engagement, and social supports)
- Behavioral Health
- Services Navigation (including Home & Community-Based Services)

- Financial Security/Poverty Reduction (including Food Security)
- Legal and Criminal Justice Support

The RFA requires grantees to “align the Local Plan work to other community priorities, goals, and initiatives.” The RFA clarifies that Local Plans should be “cross-sector, community-driven, and action-oriented,” should, “improve a community’s livability for people of all ages,” and be “centered on equity, cultural competency, community engagement, and disability inclusion strategies.” Finally, the RFA states, “Communities may use the five goals and 23 strategies of California’s MPA to help narrow their Local Plan’s priority initiatives and areas of opportunity.”

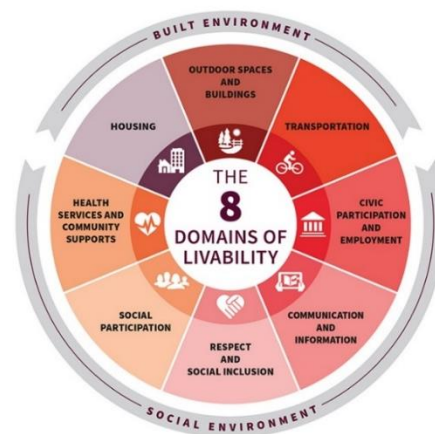
### **Grantee Priorities**

In their applications, some grantees described an intention for their Local Plan to mirror the California Master Plan for Aging Five Bold Goals (see Figure 6), while others referenced an intention to organize their local plans around AARP’s framework of Eight Domains of Livability (see Figure 7).

Figure 6: California Master Plan for Aging Five Bold Goals



Figure 7: AARP Eight Domains of Livability



General priorities for Local Plans include:

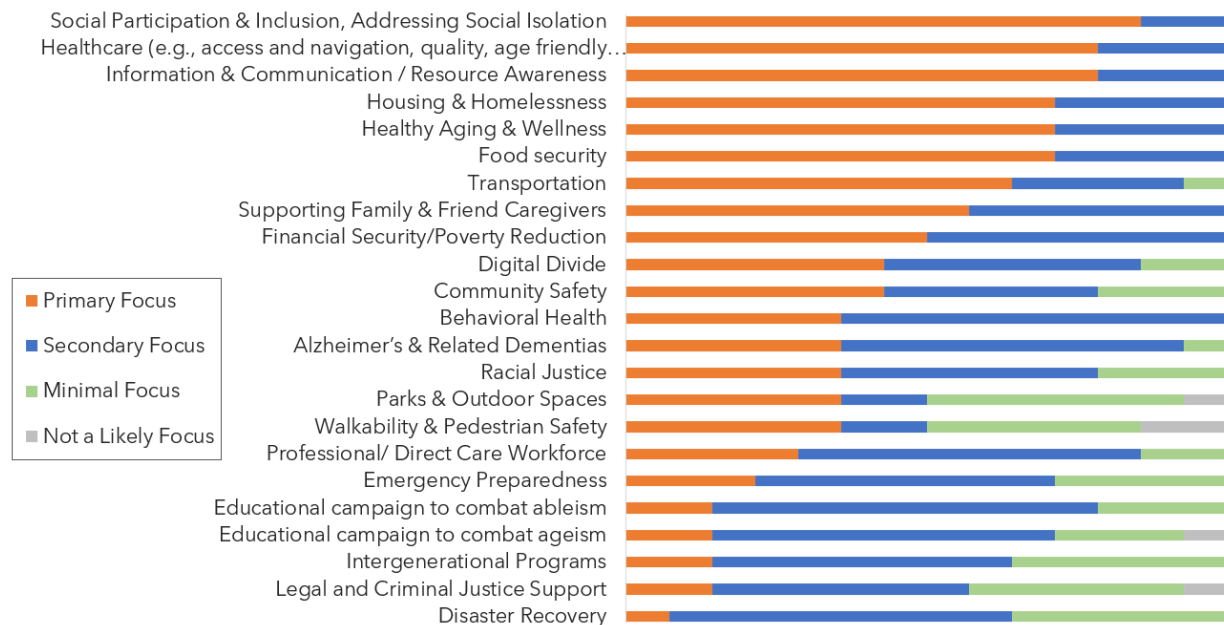
- Improve communication and awareness of existing services
- Address the affordable housing shortage
- Focus on homelessness
- Prevent premature institutionalization
- Strengthen home and community-based services
- Focus on social isolation
- Focus on hunger/ food access
- Improve transportation
- Improve disaster preparedness and response
- Focus on informal and formal caregivers in the public and private sector
- Expand technology access
- Address racial inequity in County services

Some grantees were specific about activities they intend to accomplish through their Local Plans, for example:

- Relaunch a local coalition for service providers
- Expand the coverage area of their emerging Aging and Disability Resource Connection (ADRC)
- Expand home delivered meals
- Expand an existing dementia awareness campaign (“purple cities”)
- Rescue a local senior center and hospital from closing down
- Offer free or low-cost case management
- Advocate for higher wages and enhanced hours for paid caregivers
- Expand senior center activities.

The pre- survey clarified primary and secondary priorities they hoped to address through their Local Plan. Grantees selected multiple priorities, as shown in Figure 8. The average number of primary priorities was 10, with a range of 4 – 22, and the average number of secondary priorities was 9, with a range of 5-16.

Figure 8: What Priority Areas do you Anticipate your LADAP will Focus On?



Open ended responses revealed 12 ‘other’ primary priorities, and four ‘other’ secondary priorities, as shown in Table 3. The priorities included engaging priority populations (e.g., monolingual Spanish Speakers, residents of long-term care, rural/isolated older adults, private sector), clarifying roles for implementation (e.g., roles of city departments), and general goals of advocacy and ensuring adequate funding for existing programs.

We anticipate these priority areas may shift over time, as grantees gather data through their LADAP needs assessment activities. Grantees may also need to narrow down priorities to ensure their Local Plans are feasible, actionable, and achievable.

Table 3: Open - Ended Responses to Priorities

Primary Focus
Access to Services for underserved populations
Eight domains AFC
Roles of City Depts
Sustainability
Intersectionality of aging and disability
Creating a model, including training, that can be duplicated in other towns
Monolingual Spanish Speakers
Including residents of long-term care, who are often left out of the conversation
We need to see what the community wants to prioritize
Including the private sector
Volunteerism
Adequate Funding for Critical Programs
Secondary Focus
Educator Ableism Training
Rural / Isolated Seniors
Rural / Isolated Adults Living with Disabilities
Advocacy

## Sustainability Strategies

Applicants described their approach to “implement, evaluate, and sustain the developed Local Plan beyond the life of this funding.” Grantees described various planned strategies to ensure sustainability beyond the current grant period. These strategies could be organized in five categories:

1. **Lasting multisector awareness of aging and disability issues:** Grantees described a desire for elected officials, cross sector municipal departments, and community-based organizations to have lasting, increased awareness of aging- and disability-specific needs in their local communities. They described plans to offer in-service trainings, organize one-on-one meetings with department heads from various sectors, and embed aging and disability advocates into other municipal planning bodies (e.g., embed an advocate into an existing stakeholder committee to inform the Public Health Department’s Community Health Improvement Plan). Grantees hoped that this increased awareness would influence departments and agencies’ practices, program, policy, and funding decisions beyond the LADAP grant period.
2. **Lasting changes to practices or programs:** According to their grant applications, through their Local Plans, grantees hoped to “transform the infrastructure and coordination of services and supports serving older adults, people with disabilities, and professional and family caregivers across sectors.” They also hoped to create “new programs and services that specifically address the needs of aging and disabled residents.” By changing practices, expanding and launching new programs, they saw their LADAP efforts making a lasting impact.

3. **Securing future funding:** Grantees recognized a need to secure additional funding to support continued planning, oversight, evaluation, and implementation beyond CDA's LADAP grant period. Potential funding sources included local foundations, local tax revenue, or state or federal grants. Some grantees planned to incorporate LADAP activities into existing municipal or agency budgets post-LADAP grant.
4. **Accountability:** Grantees described various agencies, departments, and decision-making bodies that they intend will be accountable for LADAP sustainability and implementation beyond this current grant period. While some grantees were committed to long-term oversight of Local Plan implementation, others described their AAA or ADRC Advisory Committees taking on oversight, and still others hoped to identify new lead entities during the LADAP grant period.
5. **Tracking progress:** Grantees described various plans to evaluate LADAP implementation and impact beyond the current grant period. One grantee described plans to hold quarterly listening sessions with the public post-grant, to understand how Local Plan implementation impacted community members. Several grantees mentioned plans to report plan progress to the community on a regular basis through public reports or presentations to local coalitions. Grantees also recognized that their Local Plan may need to be adjusted over time as needs change in the community.

Phase I grantees were asked to further clarify sustainability plans through the pre-survey. Grantees were invited to commit to up to ten potential sustainability strategies, as shown in Table 4. All grantees reported that they “hope to develop a strengthened network of organizations collaborating to support older adults, people with disabilities, and/or caregivers in our community,” and “obtain increased visibility of age and disability friendly champions and issues in our community.”

It is essential to continue to engage grantees in thinking about their sustainability strategies to ensure lasting impact in the LADAP communities beyond the current grant period.

Table 4: Sustainability Strategies

By March 2025...	Yes	No
we hope to <b>develop a strengthened network</b> of organizations collaborating to support older adults, people with disabilities, and/or caregivers in our community	15	0
we hope to <b>obtain increased visibility of age and disability friendly champions and issues</b> in our community.	15	0
we hope to <b>obtain a City or County Resolution or Proclamation</b> in support of our LADAP.	14	1
we hope to <b>obtain additional funding to implement and/or evaluate</b> our community's LADAP.	14	1
we hope to <b>identify one or more agencies in our community that will take on the responsibility for continued oversight and/or implementation</b> of the LADAP, or elements of the LADAP.	13	2
we hope to have a LADAP in place that <b>aligns aging and disability services and systems</b> to be more user-centered and efficient.	13	2
we hope to obtain a commitment to <b>new or expanded programs</b> within our agency or partner agencies that support our LADAP priority areas.	12	3
we hope to propose or secure <b>new or expanded policies/ regulations</b> at the City/ County levels.	12	3
we hope to implement a <b>tracking system to monitor progress</b> of our LADAP beyond the CDA grant period.	12	3
we hope to <b>secure staff that will be responsible for sustaining and implementing our LADAP</b> beyond the CDA grant period.	11	4

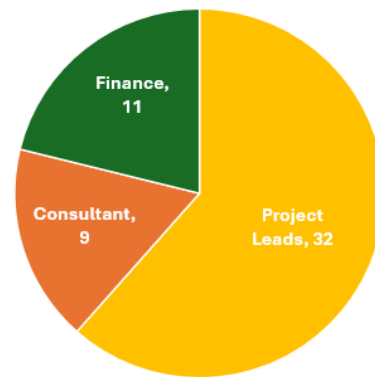
## Engagement with Technical Assistance

Office Hours and Learning Labs covered a variety of topics, featuring grantee spotlights and guest presenters as shown in Appendix B. At the sessions, participants were highly engaged, asking questions and sharing experiences with one another. Having a regular opportunity to learn from and support one another has been a clear highlight for grantees.

A range of 17 to 32 people, representing 11 to 14 grantee sites, registered for each session. Slightly over half of grantees (53%) registered for all seven technical assistance sessions. Oftentimes, more than one representative from a grantee agency registered, with up to six representatives registering for one of the sessions.

Fifty-two total individuals registered for at least one meeting. Of these, many were project leads (62%) or consultants (17%), and 21% had a finance role within the grant, as shown in Figure 9.

Figure 9: Types of Roles Represented in Office Hours and Learning Lab Registration



As shown in Figure 10, of the 52 total individuals who registered for at least one session, 17 registered for only one, while 12 registered for at least six of the seven sessions. Finance and consultant staff tended to register for fewer sessions, while project leads were more likely to register for more sessions. This may be because the technical assistance sessions are catered towards project leads and are less relevant to finance professionals. Furthermore, consultants may have been hired later in the project.

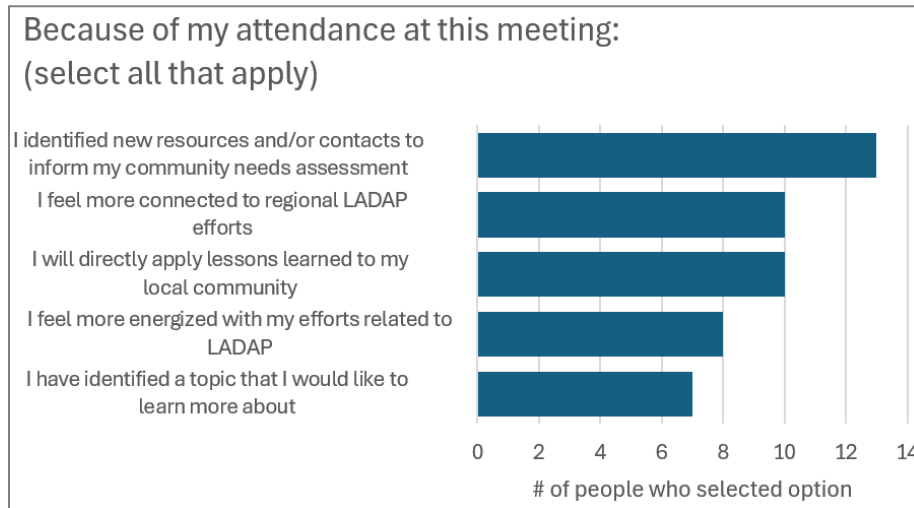
Figure 10: Office Hours and Learning Lab Consistency of Registration Across Roles



Of the two Learning Labs conducted, 23 of 60 participants completed a feedback survey. Overall, the Learning Labs were well received. As shown in Figure 11, participants found them helpful in various ways, with most reporting they identified new resources and/or contacts to

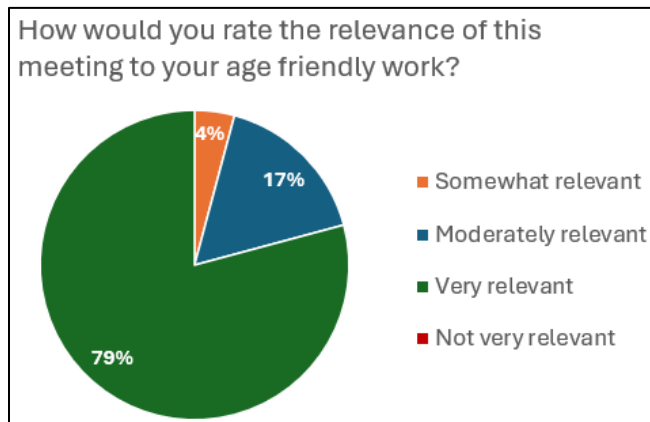
inform their community needs assessment. Attendees also report feeling more connected with regional LADAP efforts and will directly apply lessons learned to their community. Over half of attendees (56.5%) reported that they felt the Learning Labs were very productive, and the remaining 43.5% of attendees felt the sessions were moderately productive.

Figure 11: Learning Lab Feedback Survey Results (N=23)



Furthermore, as shown in Figure 12, 79% of grantees found the Learning Labs to be very relevant, 16.7% found them moderately relevant, and 4.2% found the Learning Lab to be somewhat relevant.

Figure 12: Relevance of Learning Labs (N=24)



## IV. Conclusion / Recommendations

Overall, there is great heterogeneity among grantees. They represent various types of lead agencies, including county or city governments, non-profits, Area Agencies on Aging, Independent Living Centers, and/or consortia of organizations. Furthermore, grantees plan to focus on diverse geographic areas, ranging from a single city to multiple cities, to regions within a county (e.g., Sonoma Valley, Salinas Valley), to a single county, or multiple counties. Across these regions, the population size and demographic composition are also heterogeneous; this will require unique engagement strategies and divergent implementation priorities. While most grantees plan to develop one Local Plan, some will develop two plans, and one grantee committed to develop four plans.

Grantees describe many different starting places in terms of accomplishing the six LADAP objectives. For some, this is a brand-new initiative, while others saw the LADAP grant as an opportunity to build upon decades of previous work. Some grantees came in with complementary funding for LADAP-related activities, or recently restructured programs or departments to streamline services. These inputs may provide inertia for the present grant program.

Grantees have ambitious goals to address multiple priorities via their Local Plans, ranging from social inclusion, to healthcare, resource awareness, housing and homelessness, healthy aging, food security, transportation, and more. We anticipate these priorities will be refined through a process of community engagement. Grantees will likely have different ways of exerting influence, based upon internal structures and previous relationships. For example, some grantees have an established track record engaging elected officials, participating in a thriving network of community-based organizations, or spearheading advocacy coalitions that engage a mix of professionals and community members.

During the first six months of the grant program, grantees have been highly engaged in technical assistance sessions. All participants reported that the Learning Labs were relevant, with most saying the topics were 'very' relevant.

To ensure grantees receive the support they need to succeed, and to support LADAP evaluation efforts, we propose five recommendations as follows:

1. ***Provide uniform reporting structures for grantees:*** Grant applications were submitted in a narrative format. Community demographics, previous LADAP-related efforts, and workplan implementation were described with varying detail. To facilitate evaluation, we will provide more structured grantee reporting processes including Qualtrics surveys with a mix of quantitative and qualitative measures and logic patterns to tailor report structures to grantees' unique characteristics.
2. ***Provide extra support to grantees who are early in the planning process:*** Grantees came in with a variety of starting points. Some grantees described previous efforts to build awareness of aging and disability related issues in their communities, established networks of community-based organizations or advocacy coalitions, existing LADAP advisory committees, relationships with elected officials, previous enrollment in the AARP Age Friendly Network, or previous needs assessment activities. In contrast, other grantees are eager to begin LADAP work but bring less previous relevant experience. These grantees may need extra support to guide them through the LADAP objectives.



Additionally, depending on if the grantee is a County or City government, or a non-profit, they may need different types of support throughout the project.

3. ***Include technical assistance focused on incorporating a disability-focus into LADAP activities:*** Two thirds of Phase I grantees report being primarily aging focused. Grantees could benefit from guidance to ensure a disability focus is weaved throughout their LADAP activities.
4. ***Continue to solicit input on technical assistance topics from grantees:*** Grantees exhibit strong engagement in Office Hours and Learning Labs. Bringing in expert speakers, spotlighting grantees, and connecting the grantees with one another fosters a community of shared learning and support. Grantees bring in strong expertise that they could share with each other.
5. ***Regularly discuss feasibility and sustainability of LADAP plans:*** The six LADAP objectives outlined in the RFA did not include a process for planning for sustainability. It is essential for grantees to consider their sustainability strategies early on and revisit these plans regularly to ensure lasting impact of LADAP activities. Grantees have varying infrastructure that will lead to diversity in sustainability plans, tailored to each community's unique characteristics. Sustainability discussions could also be weaved into Technical Assistance sessions.

## V. Appendix A: LADAP Grantees' Region of Focus, Geographic Area, and Population Size

Agency Name	Region(s) of Focus	City/ County	Population	Geographic Area (sq. miles)	Pop Density
<b>Agency on Aging - Area 4</b>	Yuba and Sutter Counties	Two Counties	182,800	1234.70	148.05
<b>Alliance on Aging</b>	Salinas Valley in Monterey County	Region within a County	162,791	2520.74	64.58
<b>Center for Age Friendly Excellence</b>	Cities of Brisbane, Daly City, East Palo Alto, Pacifica	Four Cities	176,362	43.14	4088.13
<b>City of Azusa</b>	City of Azusa	City	50,000	9.13	5476.45
<b>City of La Puente</b>	City of La Puente	City	40,000	3.48	11494.25
<b>City of Santa Monica</b>	City of Santa Monica	City	89,947	8.30	10836.99
<b>City of Vista</b>	City of Vista	City	98,651	19.00	5192.16
<b>Disability Action Center</b>	Shasta, Butte, Tehama, and Glenn Counties	Four Counties	485,082	9675.30	50.14
<b>Independent Living Resource Center</b>	Santa Barbara County	County	454,000	2733.90	166.06
<b>Inland Caregiver Resource Center</b>	Riverside and San Bernardino Counties	Two Counties	4,500,000	27277.40	164.97
<b>Madera County</b>	Madera County	County	159,410	2136.90	74.60
<b>Marin Aging and Disability Institute</b>	Cities of Novato and San Anselmo	Two Cities	65,830	30.70	2144.30
<b>Merced County</b>	Merced County	County	290,014	1955.00	148.34
<b>Orange County</b>	Orange County	County	3,200,000	948.00	3375.53
<b>Sacramento County</b>	Sacramento County	County	1,585,055	984.00	1610.83
<b>San Luis Obispo County</b>	San Luis Obispo County	County	283,159	3300.00	85.81
<b>Seniors Council</b>	San Benito and Santa Cruz Counties	Two Counties	336,027	1835.00	183.12
<b>Solano County</b>	Solano County	County	446,610	909.00	491.32
<b>Sonoma County</b>	The Sonoma Valley and City of Santa Rosa	Region within a County and City	220,000	184.09	1195.07
<b>Stanislaus County</b>	Stanislaus County	County	552,878	1495.00	369.82
<b>Total</b>			13,378,616	57302.78	

## VI. Appendix B: Topics and Engagement in Technical Assistance Meetings

Date	Topics Covered	# of Registered Participants	# of Registered Sites (N=15)
9/12/23 Office Hours	<ul style="list-style-type: none"> <li>• Introduction to online LADAP resource board</li> <li>• Strategies to raise awareness of LADAP efforts</li> <li>• Advisory Committee formation</li> </ul>	26	12
10/5/23 Learning Lab	<ul style="list-style-type: none"> <li>• Grantee Spotlight: Center for Age Friendly Excellence (CAFE)</li> <li>• History of WHO/ AARP Age Friendly Initiative</li> <li>• Example mixed methods need assessment via focus groups and AARP Livability Survey</li> <li>• Breakout sessions to discuss LADAP needs assessment</li> </ul>	31	15
10/11/23 Office Hours	<ul style="list-style-type: none"> <li>• Grantee Spotlight: Inland Caregiver Resource Center and Disability Action Center</li> <li>• Intro to The SCAN Foundation Rural MPA Initiative</li> <li>• Process used in three rural regions to develop local MPAs, including selecting priorities, conducting qualitative needs assessments, and ensuring diverse participant recruitment.</li> <li>• Overview of CDA's CA2030 initiative.</li> </ul>	17	11
11/14/23 Office Hours	<ul style="list-style-type: none"> <li>• Guest Presenter: Shannon Guzman, Director, Housing and Livable Communities with AARP</li> <li>• Demo of the AARP Livability</li> <li>• Resources from AARP: Age Friendly Network, Community Challenge Grants, and Livable Communities pamphlets.</li> </ul>	29	12
12/7/23 Learning Lab	<ul style="list-style-type: none"> <li>• Guest Presenter: Rafi Nazarians, Advocacy Director, AARP California</li> <li>• Benefits and requirements of joining the AARP Age Friendly Network</li> <li>• The 5-year Age Friendly cycle</li> <li>• AARP resources: community challenge grant, livability surveys, listening session toolkit, statewide roundtables, and informational handouts and reports</li> </ul>	29	12
12/12/23 Office Hours	<ul style="list-style-type: none"> <li>• Intro to the 6-month LADAP progress report requirements and Advisory Committee demographic survey</li> </ul>	30	14
1/9/24 Office Hours	<ul style="list-style-type: none"> <li>• Open-ended discussion; topics included advisory committee structures and 6-month progress report.</li> <li>• A survey was introduced to gather input on future Office Hours and Learning Lab topics.</li> </ul>	32	14