

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

Progress Report

Report Period:

February 1, 2024 – September 30, 2024

Submitted by the Family Caregiving Institute, October 31, 2024

UC DAVIS
HEALTH

BETTY IRENE MOORE
SCHOOL OF NURSING

Family Caregiving Institute

Evaluation Team

Investigators:

Pauline DeLange Martinez, PhD | Investigator/ Senior Researcher

Heather M. Young, PhD, RN, FAAN | Co-Principal Investigator

Janice F. Bell, PhD, MN, MPH, FAAN | Co-Principal Investigator

Study team:

Jennifer Mongoven, MPH

Jessica Famula, MS, CCRP

Quynh Vo, BS

Elizabeth Bogumil, MA, UC Riverside

Emily Greenfield, PhD, Rutgers University

Natalie Pope, MSSW, MBA, Rutgers University

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 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. Agencies received funding to support LADAP initiatives within their local communities, which could be defined as a city, a group of cities, a county, a group of counties, or Tribal land(s). In this second progress report, we review the activities of 21 grantees.

CDA contracted with the University of California, Davis-Betty Irene Moore School of Nursing, Family Caregiving Institute (UC Davis FCI) to evaluate the LADAP Grant Program. The evaluation includes multiple data sources and methods, including surveys, report and document review, and focused interviews.

Six grantees were fully on schedule with their original workplan, 14 reported they were "mostly on track," and only one requested modification to their workplan. However, 17 out of 21 grantees requested no-cost extensions through June 30, 2025. Additionally, five of the 21 grantees reported they had not yet fully staffed their LADAP teams by the July 31, 2024 reporting deadline.

The 21 LADAP grantees customized their awareness efforts, community assessment strategies, and implementation plans to fit their unique communities. They made intentional efforts to engage cross-sector local leaders who can act as bridges to diverse sectors and underserved geographic and demographic communities. These partners included elected officials, government staff, Area Agencies on Aging (AAAs), Independent Living Centers (ILCs), Community Based Organizations (CBOs), libraries, private sector partners, philanthropic organizations, and more. Grantees made substantial progress on objectives related to awareness and engagement of the community, elected officials, and key partners. Nineteen of the grantees established Advisory Councils, eleven enrolled in the AARP Age Friendly Community Network, and five completed their needs assessments with 12 in process.

CDA’s LADAP grant program has already gained national recognition as a pioneering initiative, highlighting the feasibility and importance of investing in leadership and public-private partnerships at multiple system levels to create communities that are inclusive for people of all ages and abilities. This national interest is demonstrated through several examples:

- At the 2024 Grantmakers in Aging conference, CDA’s MPA philanthropic partners invited our team to present on California’s local MPA efforts.
- Following the publication of New Jersey’s statewide blueprint for age-friendly communities, the New Jersey Department of Human Services is in the process of launching a \$5 million grant program to support local age-friendly planning efforts like California’s LADAP grant program. Through our ongoing partnership with colleagues at Rutgers University, leaders are exploring the opportunity of a formal partnership with the

California team, facilitating shared learning between California and New Jersey through 2026.

- The American Society on Aging accepted two proposals highlighting the LADAP grant program for their April 2025 conference

State leaders who presented at the *CA for All Ages & Abilities: MPA Day of Action* emphasized the importance of tailoring state MPA implementation to the diverse regions of California, considering the unique geographies, demographics, and service barriers present. The LADAP grant program offers a structure to facilitate communication and coordination between state and local efforts. As the program progresses, it will be important to assess the multifaceted ways in which the work and its impact are sustained, including monitoring how grantees address potential implementation gaps after the LADAP grant concludes. Establishing a structure for continued shared learning among local and state leaders would continue the momentum beyond the grant period. Overall, grantees are optimistic about the future and enthusiastic about their role in supporting the statewide Master Plan for Aging.

Recommendations

To continue to support Local Planning efforts, we propose six recommendations as follows:

1. Continue to facilitate inter-grantee relationships and knowledge sharing through Office Hours and Learning Labs. Consider reaching out to grantees with low attendance to better understand barriers to participation.
2. Encourage grantees to focus their remaining time on refining actionable priorities, including identifying resources, funding, leadership, and staffing needs for plan implementation. Facilitate discussion of local sustainability strategies, including exploring options for implementation that do not require funding, and identifying potential funding sources for those that do.
3. Provide additional guidance on evaluation metrics for plan implementation, through an Office Hours session or Learning Lab, to help grantees make use of existing resources such as Canada's [Age-Friendly Communities Evaluation Guide](#) and the World Health Organization's guide, "[Measuring the Age Friendliness of Cities: a Guide to Using Core Indicators](#)."
4. Continue identifying opportunities for local planning efforts to inform statewide MPA initiatives, for example, by tracking local priorities, analyzing variations across regions, and reviewing promising policies, programs, and practices for scalability. As more Local Plans are developed, identify alignment among them, track promising policies, programs, and practices that could be scaled, and seek opportunities to align local and statewide efforts to enhance outcomes and improve coordination.
5. Explore strategies for CDA to promote the sustainability of local planning and implementation efforts beyond the LADAP grant program.
6. Consider establishing a structure that enables continued shared learning opportunities across local regions beyond the LADAP grant program.

Table of Contents

I. INTRODUCTION	5
LADAP Grant Program Introduction	5
II. EVALUATION DESIGN AND METHODS.....	5
Evaluation Goals.....	5
Data Collection.....	6
Data Analysis	7
III. PRELIMINARY FINDINGS	8
Grantees' Scope of Work	8
Objective 1: Build Community Awareness.....	9
Objective 2: Gain Community Leader Support	10
Objective 2: Establish an Advisory Committee	14
Objective 2: Enroll in the AARP Network.....	18
Objective 3: Community Assessment	19
Objective 4: Select Goals & Priority Initiatives.....	23
Objective 5: Build the Local Plan and Objective 6: Gain Approval, Publicly Release and Promote the Local Plan	25
Sustainability Strategies.....	26
Engagement with Technical Assistance.....	27
IV. CONCLUSION / RECOMMENDATIONS.....	28
APPENDIX A: ADVISORY COMMITTEE COMPOSITION	31
APPENDIX B: TOPICS AND ENGAGEMENT IN TECHNICAL ASSISTANCE MEETINGS	34

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 communities, which could be defined as a city, a group of cities, a county, a group of counties, or Tribal land(s). Fifteen grantees were funded during Phase I, launched on July 31, 2023, and six additional grantees were selected for Phase II, launched on February 28, 2024. One agency received funding in both Phase I and Phase II to work with two different communities. Therefore, for the purposes of this report, we consider the total of 21 grants (N=21). The LADAP grant program was originally scheduled to conclude in March 2025, but 17 of the 21 grants applied for no-cost extensions through June 30, 2025.

II. Evaluation Design and Methods

CDA contracted with the University of California, Davis-Betty Irene Moore School of Nursing, Family Caregiving Institute (UC Davis FCI) to evaluate the LADAP Grant Program. The evaluation plan was developed in collaboration with CDA staff and with input from national experts on Age Friendly Community initiatives, including subcontracted experts in the School of Social Work at Rutgers, The State University of New Jersey. The evaluation includes multiple data sources and methods.

Evaluation Goals

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.**

This second progress report covers February through September 2024. It provides a summary of grantees' progress, organized according to the six objectives outlined in the LADAP RFA. The report highlights early successes, identifies facilitating factors, and shares promising practices, while also examining barriers, challenges, and lessons learned. Finally, we offer recommendations for optimizing the remaining eight months of the grant program.

Data Collection

This progress report includes information gathered between February 1st to September 30th, 2024. Table 1 summarizes the data sources for this report.

Table 1: Evaluation Data Sources Informing this Report

Data Source	Focus	Participants	Included in this Report Phase/collection date
Grantee Pre-Surveys	Site project plans and progress, and sustainability goals	Phase II grantees	Phase II: April 12, 2024
Advisory Committee Demographic Survey	Race/ethnicity, sexual orientation and gender identity, age, and ability	Grantees surveyed Advisory Committee members	Phase I: December 2023-September 2024 Phase II: July- September 2024
Grantee Baseline Focus Groups	Key topics, plans for ensuring diversity, equity, inclusion, and sustainability	All Grantees	Phase II: May-June 2024
Grantee 6-month Progress Reports	Grant Progress	All grantees	Phase I: January 31, 2024 Phase II: July 31, 2024
Grantee 12-month Progress Reports	Grant Progress	Phase I grantees	Phase I: July 31, 2024
Records from office hours and learning labs	Grantee engagement	All grantees and their representatives	Office Hours and Learning Labs offered between February – September 2024

Grantee Pre-Surveys. A Qualtrics survey completed by Phase II grantees in early April 2024 captured baseline status of select LADAP objectives and activities, priority areas for Local Plans, and sustainability plans.

Advisory Committee Demographic Survey. Grantees were encouraged to request their Advisory Committee members to complete an online survey to assess demographic representation on the committees. 208 surveys were collected from Advisory Committee members representing 12 of the 21 grantees.

Grantee Baseline Focus Groups. Focus groups were held within the first quarter of the contracts. The purpose was trifold: to inform LADAP grant program evaluation, to inform project support/ technical assistance, and to foster collaboration among grantees. The semi-structured interviews built upon findings from the Grantee pre-surveys. We discussed grantees' early reflections on top priorities/ areas of focus for their local plans; strategies to ensure diversity, equity, and inclusion in the scope of work; and thoughts about sustainability and measures of success. Focus groups were recorded and transcribed.

Grantee 6- and 12- Month Progress Reports. A Qualtrics survey captured grantees' progress related to staffing, Advisory Committee and other partner engagement, community awareness efforts, needs assessment activities, priority setting, and overall reflections.

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 February through September 2024, we held seven Office Hours and four Learning Labs. Learning Labs provided structured opportunities for grantees to connect with and learn from one another. 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

Quantitative data analysis

Quantitative data from all surveys and progress reports were analyzed using descriptive statistics. We present summary statistics, tables, and graphs to display the findings.

Qualitative data analysis

Focus group transcripts, survey comments and notes from grantee spotlight presentations were imported into Dedoose (qualitative analysis software), coded, and analyzed using qualitative descriptive methods.

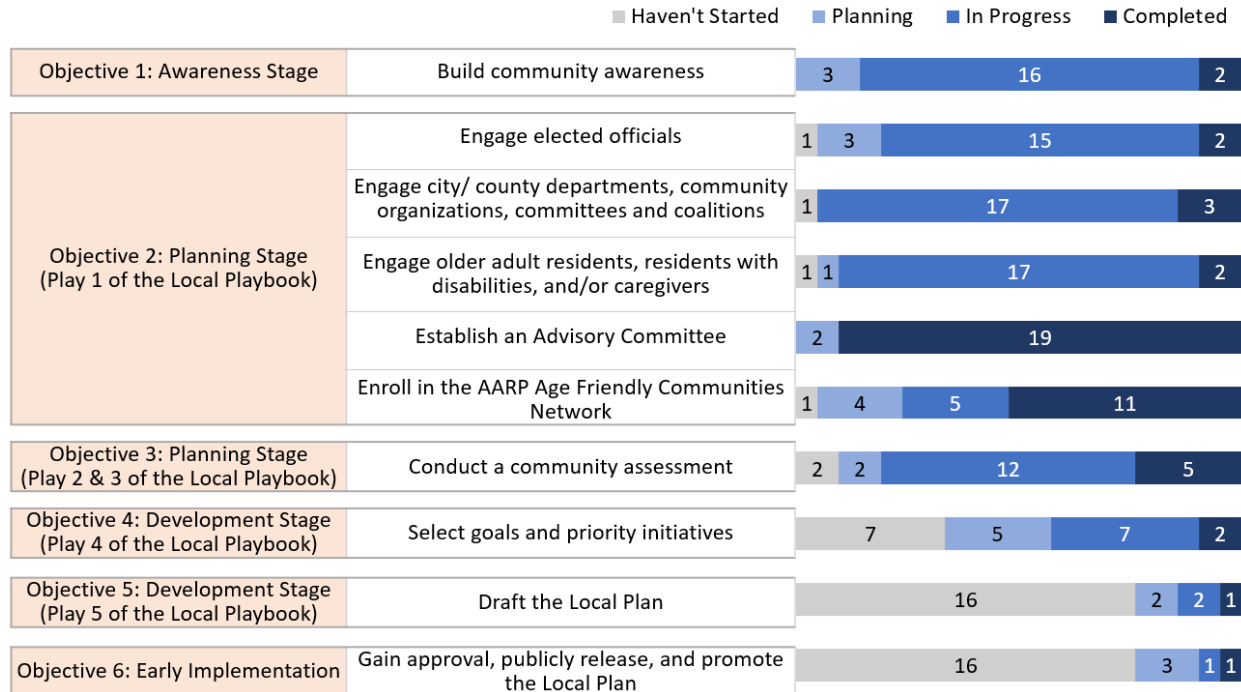
III. Preliminary Findings

Grantees' Scope of Work

The LADAP Scope of Work encompasses six objectives, categorized into stages of awareness, planning, development, and early implementation. These objectives, detailed in the RFA, are loosely aligned with CDA's Local Playbook. In this evaluation report, we summarize progress across the six objectives, highlight early successes, identify facilitating factors, share promising practices, and examine barriers, challenges, lessons learned, and recommendations.

As illustrated in Figure 1, grantees made varying progress across the six objectives. It is important to acknowledge that grantees began the program at different starting points. Some entered the program with completed community assessments or already established advisory committees, [as outlined in our previous progress report](#). Moreover, the timeline for launching grantees varied: Phase I began in July 2023, while Phase II grantees started six months later, in January 2024.

Figure 1: Workplan Progress Overview (N=21)*



*Figure 1 depicts the progress of 21 grantees as reported in their progress reports on July 31, 2024 except for the count for enrolling in the AARP network, which was updated to reflect data from the AARP website up to September 2024.

One grantee was awarded two separate grant contracts and is thus counted twice (N=2).

Two grantees are working on multiple Local Plans—one for four cities and the other for two counties. This figure highlights the progress of one community per grantee that is the furthest along in their workplan.

In the grantees' progress reports submitted July 31, 2024, six grantees indicated they were fully on schedule with their original workplan, 14 reported they were "mostly on track," and only one requested modification to their workplan. However, 17 out of 21 grantees requested a no-cost extension through June 30, 2025, and as part of their contract adjustments, they will be

submitting revised workplans to CDA this fall. Additionally, five of the 21 grantees reported they had not yet fully staffed their LADAP teams by the July 31st reporting deadline.

Grantees faced a few broad challenges affecting their LADAP progress. For some, particularly government agencies, limited staff capacity has been a barrier, resulting in a reliance on external consultants. Compounding this issue, many grantees reported delays in hiring consultants, whom they depend on to lead key objectives in their work plans. These delays were due to the lengthy County RFP process or difficulties finding qualified consultants with the necessary expertise. Furthermore, some grantees, especially those in Phase II, raised concerns about the brief period of the LADAP grant program. Even with the no-cost extension, they felt that the period remains short to develop a comprehensive and implementable Local Plan. However, consistent with the goals of the funding, grantees customized their approaches to meet the distinct contexts and needs of their communities. They employed innovative strategies to raise awareness of their LADAP initiatives, engaging community leaders, forming Advisory Committees, conducting assessments, setting priorities, and advancing the development of their plans, as we describe throughout the next sections of this report.

Objective 1: Build Community Awareness

Establishing a strong community presence is essential for the success of LADAP initiatives. Most grantees report implementing various awareness strategies to build community support, including the use of websites, mailing lists, social media, local media outlets (e.g., local radio or TV), and public events as shown in Figure 2. To enhance these efforts, several grantees engaged media consultants to optimize their outreach. Diverse languages spoken within the grantee's region means outreach materials need to be translated, which can be costly. However, this type of outreach is particularly important in some regions to engage monolingual Spanish speakers.

Figure 2: Awareness Activities (N=21)

LADAP-focused webpage or website	Yes, 11	No, 10
LADAP mailing list	Yes, 14	No, 7
Using social media	Yes, 12	No, 9
Local media presence	Yes, 13	No, 8
Community event	Yes, 11	No, 10

Website content typically includes past meeting recordings and notes, links to surveys, listserv subscription options, advisory committee member details, and upcoming event information. They use mailing lists to share updates, event information, and news with the community, and to recruit participants to engage in activities. Some grantees also engaged partners in helping to raise awareness of their LADAP initiative, e.g., through established mailing lists of churches, senior centers, and local commissions. To build community awareness of LADAP activities, some grantees relied on Advisory Committee (AC) members to engage their personal and professional networks, with mixed success. Other grantees indicated maintaining clear, consistent, and unified messaging surrounding LADAP efforts can be challenging. One grantee created a brand style guide to help mitigate this challenge and focus their website's language on the LADAP project.

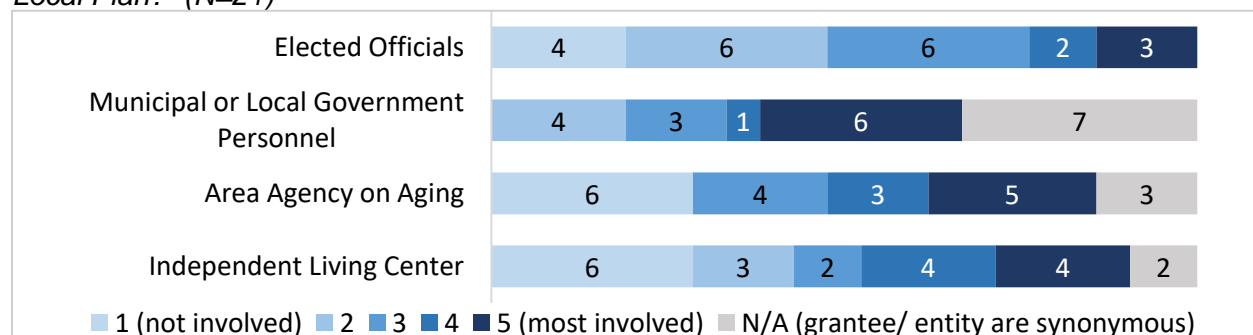
Facebook was the most frequently used social media platform, while X (formerly Twitter) was the least utilized. Other platforms include Instagram, Nextdoor, LinkedIn, and YouTube. Most grantees posted weekly or bi-weekly content. One grantee developed a social media toolkit for elected officials, including email templates, social media posts, an informational flyer, and details on upcoming meetings. The digital divide was a challenge to navigate in some regions. Though social media and email may be used to communicate LADAP efforts, there are many areas with limited internet access. Some regions leveraged the Access to Technology (ATT) program to bridge these gaps. Several grantees acknowledged the significance of tailoring awareness initiatives to the older demographic, emphasizing the necessity of integrating traditional advertising techniques alongside digital advertisements.

Media outreach was another key strategy for raising awareness of LADAP initiatives. This included press releases, news articles, radio show appearances, and TV interviews or news segments. A few grantees also utilized paid YouTube advertisements, billboards, or banners to expand their reach. In-person and virtual events have been a traditional yet effective method for promoting LADAP initiatives. These events vary in purpose, from celebrating LADAP launches to hosting brainstorming sessions and networking opportunities. Unique events included ageism and ableism trainings, open houses for Advisory Committee recruitment, and Chamber mixers. One grantee successfully co-hosted two resource events that gathered more than 800+ attendees. These events garnered various media attention, and one was featured on a news segment. For in-person community activities, transportation and recent natural disasters can be barriers to participation. Therefore, it is crucial for grantees to explore and implement more virtual engagement options.

Grantees used flyers for needs assessment recruitment and promotion of future events to partner agencies, senior centers, community centers, and local businesses. Several employed creative outreach strategies such as setting up booths at community events. Some provided copies of their Action Plan to share and discuss with community members while operating a booth at these events. To enhance outreach in remote and rural regions, several grantees chose to increase the number of smaller events rather than holding fewer larger events, thereby expanding their reach over a wider geographical region.

Objective 2: Gain Community Leader Support

Figure 3: “How involved are the following entities in planning and developing your community’s Local Plan?” (N=21)



Grantees engaged local leaders to garner support, build leadership, inform priorities, and promote sustainability for their Local Aging and Disability Action Plans. Grantees leveraged strong partnerships while forging new multisector relationships to enhance all phases of their work. As shown in Figure 3, grantees report varying levels of engagement from elected officials, local government personnel, Area Agencies on Aging, and Independent Living Centers.

Engaging Local Government

Research suggests that age-friendly planning is more sustainable and effective when supported by local municipal structures, with public sector involvement in funding, staffing, policy development, and technical assistance playing a crucial role in successful implementation.^{1,2} Of the 21 LADAP grantee agencies, 12 are from the public sector, including 4 cities and 8 counties, while the remaining 9* are community-based organizations (CBOs). A grantee's position within or outside of the public sector directly impacted its ability to engage elected officials and municipal staff.

Public sector grantees benefited from formal communication and approval channels within city or county structures. Several counties reported needing Board of Supervisors' approval to finalize contracts with CDA and hire LADAP consultants. This approval process fostered securing support and maintaining regular communication with elected officials yet caused some delays in LADAP implementation. Public sector LADAP grantees engaged local government by sending monthly updates, organizing listening sessions, and engaging municipal staff from multiple city- or county- departments including departments of public health, housing, recreation, and transportation.

CBO grantees also employed innovative approaches to engage public officials. CBO LADAP grantees engaged local government by organizing mandatory training for local government staff on ageism and ableism, using interactive elements and video stories from residents and holding one-on-one meetings with multiple city department leaders (e.g., Police, Fire, Planning) to discuss findings from their LADAP community assessment and identify actionable projects. Others organized candidate forums for the county supervisors addressing the needs of older adults and people with disabilities and engaging decision-makers to co-chair their LADAP Advisory Committee.

Many public sector and CBO grantees also engaged government-appointed commissions and councils representing older adults and individuals with disabilities, and/or focused on long term care, recreation, and community services. Engaging a government-appointed commission or council helps build credibility and visibility for LADAP initiatives, as these bodies often have direct access to elected officials. Their formal recommendations can influence policy decisions and funding allocations by aligning community needs with governmental priorities and providing a structured platform for advocacy.

Engaging Multiple Jurisdictions

Eleven grantees engaged multiple jurisdictions in LADAP efforts, including a combination of counties, cities, and unincorporated areas. This approach fostered broader community impact, encouraged resource sharing, enhanced service coordination, and built awareness of the unique needs of the region at the state level.

Engaging multiple cities and/or counties in LADAP initiatives can be challenging. Some grantees reported varying levels of buy-in across different jurisdictions, with barriers such as political division, budget, and/or staffing shortages. Cities and counties operate differently and learning the best way to engage each community requires significant effort. Additionally, one region reported tension between elected officials, city staff, and county staff over who has the control and who is driving the LADAP process. To overcome these barriers, grantees tailored

* MADI, a community-based organization, is counted twice due to holding two LADAP grant contracts – one in Phase I and another in Phase II.

their engagement strategies to each jurisdiction and identified local champions to drive engagement.

One grantee collaborated with their county's Intergovernmental Committee, which brought together local officials from both county and city governments. This approach is an effective strategy for engaging multiple levels of government within a region.

Area Agencies on Aging

AAAs are vital in Local Aging and Disability Action Planning due to their expertise in aging services and community connections. They conduct local needs assessments, gather data on older adults and people with disabilities, and track service outcomes, which enhances the development and sustainability of Local Plans. Of the LADAP grantees, six serve as their local AAA, and eleven reported varying levels of AAA involvement. However, three grantees noted challenges in engaging their local AAAs.

Disability Service Organizations

Disability service organizations, such as Aging and Disability Resource Centers (ADRCs) and Independent Living Centers (ILCs), offer critical insights and services for both older adults and people with disabilities. Their involvement ensures that Local Plans address a broad range of needs, from accessibility to community inclusion. Involvement of ILCs and ADRCs varies across LADAP grantees. Two grantees serve as the designated ILCs for their regions, and at least two others lead regional ADRCs. Many grantees highlighted the importance of engaging their local ADRC and/or ILC in their processes, including ILC representatives on Advisory Committees or partnering with an ILC to organize LADAP listening sessions.

Some grantees reported challenges in engaging ILCs due to limited response or staff capacity. In some cases, other disability-focused organizations like Regional Centers or other CBOs emerged as responsive partners. Overall, there are continued opportunities to align age- and disability-focused advocacy efforts to strengthen LADAP initiatives and enhance cross-community collaboration.

Community Based Organizations

CBOs play a critical role in LADAP efforts, leveraging their grassroots connections and expertise in culturally competent services. Engaging CBOs in LADAP efforts helped grantees develop targeted, data-driven strategies and foster community buy-in, essential for successful implementation and sustainability. Grantees engaged CBOs by offering stipends to support outreach, focus groups, and advisory roles, and formalizing partnerships with key aging and disability CBOs through memorandums of understanding. One grantee organized over three dozen presentations from various service providers to raise awareness of resources and conduct an asset inventory. Some grantees described sensitivity to empower historically underserved communities and lift CBOs that have the expertise in these communities that the grantee does not. As one grantee emphasized:

“We're trying to bring in those partners that have expertise that we don't into the conversation to help lead the effort on behalf of their communities, so that... the county's not taking up all the space in the room... We are trying to take a backseat but provide the needed backbone support that the project needs.”

Community Champions

Many grantees also described efforts to identify and build up ‘community champions,’ or individuals with lived experience, to inform local planning, drive implementation, and support sustainability of their Local Plans. Grantees described spending considerable time meeting one on one with potential champions to understand their interests, availability, and the best way to involve them in LADAP efforts. One grantee video recorded local community members’ stories to include them in a training curriculum on ageism and ableism. They emphasized:

“To make real change, to have that voice, to have it coming from a resident ... that drives our credibility in the community ... the engagement is starting with the leaders and then gaining access to more of the folks really on the ground with the direct experience.”

Others engaged community members in panel presentations at local MPA or LADAP events and found that they provided invaluable advice to optimize recruitment for the needs assessment. However, engaging community champions can be challenging. Individuals with lived experience may need support with transportation, digital literacy / access, or financial support to meaningfully participate.

Coalitions

Coalitions played a crucial role in bringing together multisector representatives and advocates to inform, develop, implement, and sustain Local Aging and Disability Action Plans. Many grantees highlighted their active leadership or membership in local coalitions as essential to driving LADAP efforts. One grantee participated in an aging-focused coalition that is also an official advisory board to their county Board of Supervisors. This structure facilitates advocacy efforts, though it also adds a burden of following county regulations and requirements for public commissions. Starting a new coalition focused on aging and disability advocacy requires considerable time and resources to build cross-sector collaboration and community buy-in. As a major component of their LADAP strategy, one grantee successfully relaunched a local coalition—focused on advocating for long-term services and supports—that had been on hiatus since the COVID-19 pandemic.

Other LADAP Partners

In addition to the key sectors and leaders described above, grantees engaged unique LADAP partners such as philanthropy, the chamber of commerce, federally qualified health centers, community health worker programs, libraries, faith communities, academia, local media, senior housing communities, and long-term care facilities. These diverse partners brought valuable perspectives and resources to LADAP efforts, helping to ensure inclusive, comprehensive planning.

Relationships Beyond Local Boundaries

Several grantees actively built relationships beyond their LADAP regions to strengthen and expand their initiatives. These cross-jurisdictional collaborations reinforced the network of age- and disability-friendly efforts throughout California. For instance, grantees engaged neighboring jurisdictions who are also developing local aging plans and attended local MPA summit meetings in neighboring areas. Some held one-on-one meetings with regions further along in their local planning efforts, learning from their experiences. Collaborative opportunities such as LADAP Office Hours and Learning Labs further supported these connections, highlighting the importance of peer-to-peer engagement, facilitated by the CDA, in fostering ongoing progress.

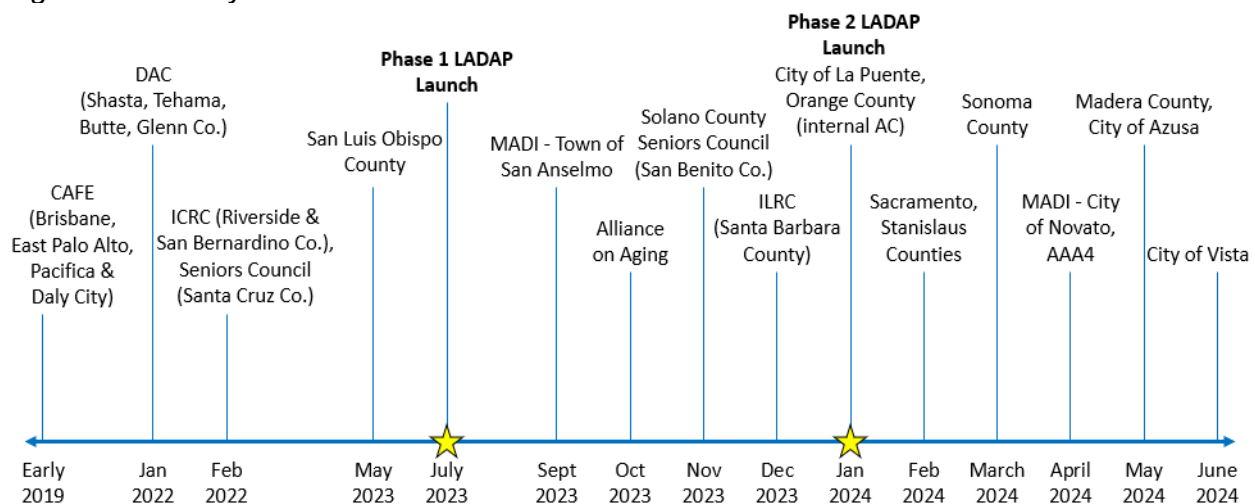
Objective 2: Establish an Advisory Committee

A milestone in the grantees' progress toward development of their Local Plans is the establishment of one or more Advisory Committees (ACs), composed of local representatives including key leaders, community champions, and decision-makers. These committees should reflect diverse perspectives from among their communities and include cross-sector leadership, to foster engagement and guide the progress of the LADAP initiative at each step.

As of July 31, 2024, 19 of 21 grantees had formed their ACs, with one grantee engaging an existing internal government AC and planning to form another committee to engage external advisors. Two grantees have yet to finalize the formation of their committee(s). About a quarter of grantees have, or will have, more than one AC, ranging from two to five committees. These committees formed around considerations for their region or purpose.

Figure 4 shows the timeline for launch of the Advisory Committees established as of August 31, 2024 (N=19 grantees*). Prior to the Phase 1 LADAP launch, five grantees had existing steering committees, workgroups, or task forces in their region which were leveraged to create the LADAP AC (either by inviting a subset of those team members to become the AC, or by inviting additional members to expand those teams into the AC).

Figure 4: Advisory Committee Launch Timeline



Some grantees remain in the nascent stage of recruitment for their committees because the work was delegated to a consultant who was not yet hired.

Organizations and Officials

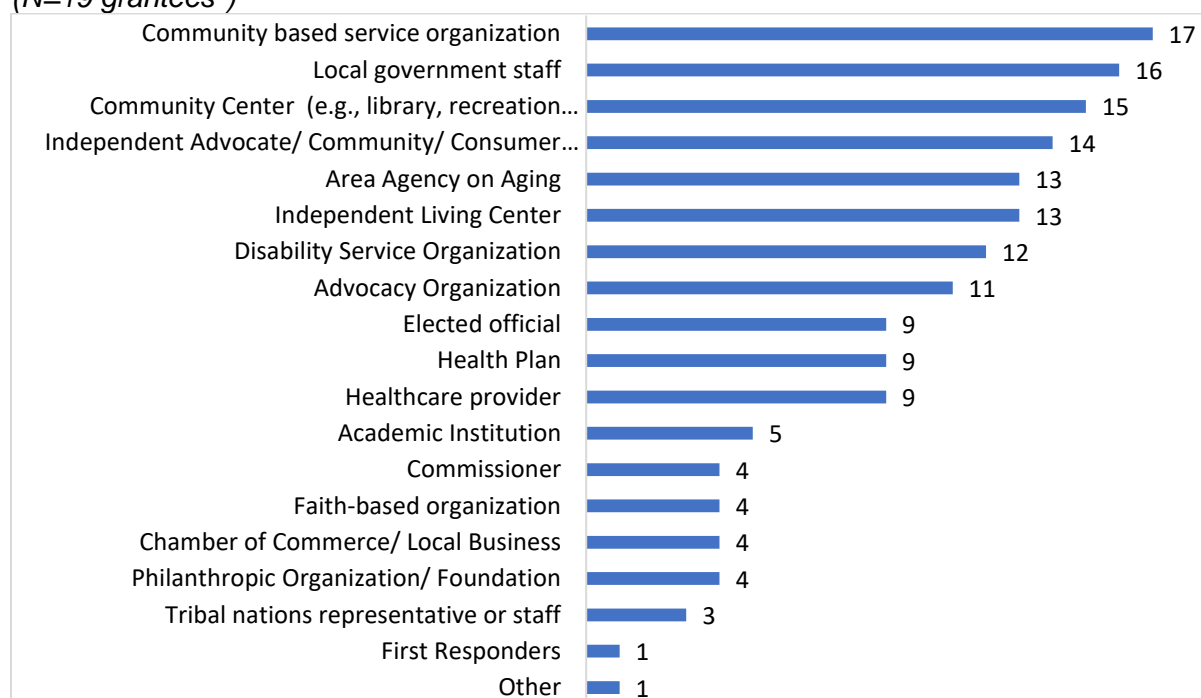
In establishing their Advisory Committees, LADAP grantees engaged organizations and officials from various sectors. As seen in Figure 5, ACs include staff from CBOs, local government, and community centers. AAAs, ILCs, and other service and advocacy organizations are also frequently represented. Several grantees reported that the process of establishing their AC required a thoughtful and intentional approach, to achieve optimal representation:

* For the Advisory Committees, we use an N=19, since 2 of the 21 grantees had not yet formed their Advisory Committees as of the writing of this report.

"One of the primary challenges has been to ensure that our LADAP is a truly multi-sector, inclusive, and consumer-driven process that will engage our communities and create investment in the final LADAP. [...] An Advisory Council was created comprised of three committees in order to maximize representation in the process."

"Finding persons that will represent communities takes time and work to go out and search. I spend a lot of time talking with people on the phone and on Zoom to see what their interest is, their availability, what community they can speak on behalf of with respect and understanding of that community. That's a big, time-consuming thing, to keep that task force vital and appropriate."

Figure 5: Types of organizations and officials represented on LADAP Advisory Committees (N=19 grantees*)



Grantees emphasized the importance of maintaining a balance in the size of the AC, to ensure it is manageable. A large committee can mean that work and decision-making will progress more slowly, or that much of the work is done in subcommittees or working groups. Leadership is key to assure that all voices are heard and to address political tensions and concerns. ACs also face the challenge of narrowing the many important or urgent priorities of those who are aging, living with disability or caregiving and achieving consensus and alignment around next steps. To create a solid foundation for the AC, one grantee provided a kickoff packet that included a clear description of obligations, enhancing understanding of the AC functions. Significant effort, time, and attention is being invested in strategizing the best approach to successfully establish the committees.

Grantees also included elected officials, healthcare providers, and local businesses. One AC included representation of First Responders. Engagement of these diverse professionals on the

* For the Advisory Committees, we use an N=19, since 2 of the 21 grantees had not yet formed their Advisory Committees as of the writing of this report.

ACs is remarkable as they bring years of practical experience and informed perspective to the LADAP and are well-positioned to create awareness and facilitate the implementation of the LADAP in their community. Grantees feel fortunate to have the involvement of “powerhouse individuals in aging and disability,” who are the “decision-makers, policymakers, and funders.”

However, some grantees recognized that professionals have high demands on their time and attention, complicating their ability to meet regularly and engage with the activities of the committee. A few grantees addressed these challenges by sending meeting reminders and holding additional meetings to present and review materials together. Some indicated that rather than invite public officials to the committee, they invited members of their staff to participate. One grantee invited healthcare providers to participate in their AC on an ad hoc basis, to minimize the time burden. One grantee held an initial in-person meeting to foster relationships and camaraderie, then transitioned to remote meetings. Additionally, one grantee set up an online workspace for their AC to share and collaborate outside of the scheduled meetings. Despite the challenges, 16 of the grantees acknowledged success, describing members as “enthusiastic,” “engaged,” “collaborative,” “insightful,” “organized,” and “motivated”:

“The committee is also realistic about timelines, resources, and geographical barriers when going into this effort, but still maintains optimism and a willingness to engage as much of the community as possible.”

“There has been a good deal of enthusiasm about the project particularly among the Community Group Committee who are excited to have an opportunity to play a meaningful role in this initiative.”

Sectors and Interests

Because the ACs are instrumental in the design, execution, and oversight of the Local Plans, their composition should reflect a diversity of perspectives. Several grantees targeted their committee recruitment around their assessments of sectors and critical needs evaluations. Figure 6 depicts the sectors and interests represented on the ACs, separated into 21 distinct categories. Top-mentioned interests include “Aging,” “Disability,” and “Social Services,” reflecting a commitment to the MPA and LADAP goals. Some grantees indicated expansive breadth of representation across up to 20 of these categories, while half of the grantees indicated representation across 10 or fewer, which may indicate a strategy to align representation with their Local Plan priorities.

In anticipation of natural shifts in participation over time, many grantees intend to continually seek committee representation from the organizations, sectors, and interest groups described above, and some report specifically seeking augmented representation from rural communities, the formerly incarcerated, and school district representatives.

Figure 6: Sectors and interests represented on LADAP Advisory Committees (N=19 grantees)

	G1	G2	G3	G4	G5	G6	G7*	G8	G9	G10	G11	G12	G13	G14	G15	G16*	G17*	G18	G19*	Total	
Aging	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	19
Disability	X	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X	X	18
Social Services	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X			17
Family Caregiving	X	X	X	X	X	X	X			X	X	X	X	X	X		X	X			15
Housing	X	X	X	X	X	X	X	X	X	X		X	X		X						13
Parks & Recreation / Public Spaces/ Community Planning	X	X		X	X	X	X	X			X	X		X	X			X	X		13
Public Health	X	X	X	X	X	X	X		X			X	X	X		X					12
Transportation	X	X	X	X	X	X	X	X	X	X	X				X						12
BIPOC/ Racial Equity		X	X	X	X	X		X	X	X	X	X	X		X						11
Behavioral Health	X	X	X	X		X	X	X	X	X				X		X					11
Health Care Navigation & Access	X	X	X	X	X	X	X	X		X	X					X					11
Social Engagement (including intergenerational)	X	X	X	X	X			X			X		X		X		X	X			11
Alzheimer's and other Dementia	X	X	X		X	X	X		X	X	X							X			10
Communications/ Media/ Public Relations	X	X	X			X		X	X					X		X	X				9
LGBTQIA+	X	X		X	X		X		X	X		X									8
Direct Care Workforce	X	X	X	X		X	X		X					X							8
Veterans	X	X	X	X								X				X					6
Financial Security	X	X		X				X	X												5
Immigrant Safety & Rights	X		X		X								X								4
Law Enforcement/ Elder Justice	X	X	X				X														4
Technology	X	X			X			X													4
Other			X					X									X				3

*Phase II grantees

** "Other" responses included Filipino & Latino Perspectives and Disaster Planning

Demographic Representation on Advisory Committees

Each grantee was provided a short, 7-question online survey to distribute to their Advisory Committee (AC) members. As of September 31, 2024, we received 208 survey responses from 12 LADAP grantees (see Appendix A). It is worth noting that some grantees have larger (or multiple) ACs, reflected in the higher survey response counts for certain grantees.

The age distribution of AC members follows a bell curve, with the largest group (25%) aged 56-65, while 3% are aged 25 and under, and 1% are over 85. Most members (79%) identify as female, 19% as male, and 3% as gender nonconforming, genderfluid, or transmasculine. In terms of sexual orientation, 85% identify as heterosexual, and 10% identify as LGBTQIA+. Additionally, 67% of members identify as White, 23% as Latinx, 9% as Asian, 6% as Black, 3% as Native American, and 1% as Pacific Islander (survey respondents could select more than one race/ ethnicity). Approximately 45% of members identify as current family caregivers.

The survey assessed lived experience with disabilities (ACS-6) (used in the Census Bureau's American Community Survey (ACS) and the CDC's Behavioral Risk Factor Surveillance System (BRFSS)). Most members (76.4%) reported not having a disability; 8.7% indicated mobility limitations; 4.8% reported challenges with instrumental activities of daily living (IADLs); 4.3% are deaf or have serious difficulty hearing; 3.8% have difficulty concentrating, remembering, or making decisions due to a physical, mental, or emotional condition; 2.9% reported challenges with activities of daily living (ADLs); and 1.9% are blind or have serious difficulty seeing. Some respondents commented on having an invisible disability that did not fit these categories, using assistive devices that mitigate their disabilities, or having professional experience working with individuals with disabilities, including parenting children with disabilities.

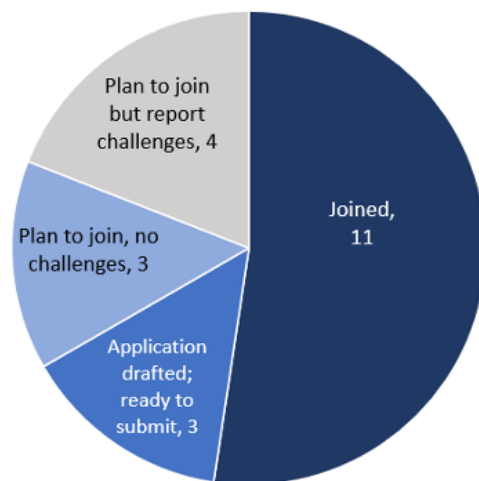
Pursuit of Diverse Representation on Advisory Committees

Although these survey responses represent only 12 of the 21 LADAP grantees, the results highlight opportunities to enhance representation in gender identity, sexual orientation, race, and ethnicity, and lived experience with disabilities within the local ACs. While there is a strong expressed desire to engage underrepresented voices in ACs, this is not yet translating into the actual composition of many ACs for several reasons. Barriers to inclusive excellence include lack of prioritizing engagement of underrepresented populations, difficulty identifying the voices missing from the AC committee, and relying on a consultant to identify potential members. Finding people who represent particular communities, locations, or demographics takes time and effort. Their engagement poses personal cost, including unpaid labor and time, and transportation to the meetings. At least two grantees considered stipends for AC members but faced implementation barriers. When available, stipends can encourage participation of those from underrepresented populations.

Strategic approaches included inviting potential AC members to participate in the needs assessment followed by inviting them to participate in the AC, supplying digital devices, offering technology training, and providing translation services to promote diverse involvement. Despite the significant obstacles, grantees pursued diverse representation on their ACs.

Objective 2: Enroll in the AARP Network

Figure 7: Grantee Progress Joining the AARP Network (N=21)



As of September 30, 2024, a total of 11 of 21 grantees had joined the AARP Age-Friendly Network, according to the AARP website. Between July 2023 and September 2024, 4 cities and 2 counties joined, and 3 grantees have drafted applications.

Challenges to joining included obtaining letters of support from county supervisors, staffing shortages, and the ability to commit to AARP's five-year cycle.

While Figure 7 reflects progress for the 21 LADAP grantees, at least six grantees engaged or plan to engage multiple counties or cities in joining the AARP network. This multi-jurisdictional approach fosters local networks, allowing neighboring communities to share lessons learned and enabling advocates to highlight nearby successes to drive further progress.

Most of the 11 LADAP grantees already in the network are led by either a local government agency or a CBO. In some cases, a CBO helped their local jurisdiction join, and in one instance, a local government partnered with a CBO as the lead agency. Additionally, one city's efforts are led by a coalition and another by an Age-Friendly Taskforce, Advisory Council, or Commission. Notably, the LADAP grantee does not necessarily need to be the ongoing contact for the 5-year AARP Network commitment.

Objective 3: Community Assessment

Grantees are encouraged to ground their LADAP in local data and the specific needs of residents. Conducting a community assessment is essential for establishing a community baseline, identifying existing strengths, and mapping available resources. The results helped shape the Local Plans by highlighting priorities and guiding the focus of working groups. Grantees employed various methods for their assessments, including targeted interviews and expert input, focus groups or listening sessions, town halls or community forums, surveys, and analysis of existing data. In some cases, delays in hiring consultants caused delays in conducting the needs assessment as this activity often fell under their domain of responsibility.

Figure 8: Needs Assessment Activities (N=21)

Collect any surveys	Yes, 10	No, 11
Conduct any focus groups or listening sessions	Yes, 12	No, 9
Conduct any town halls or community forums	Yes, 10	No, 11

Targeted Interviews and Expert Opinion

Several grantees used targeted interviews, or key informant interviews, with individuals selected for their expertise or perspective. These interviews helped sharpen the equity focus by engaging individuals involved in initiatives like the Community Health Improvement Plan (CHIP) and gathering the personal stories of older adults or individuals living with disabilities. They solicited important insights such as:

“Women from LGBTQIA+ communities have lower income on average and may not have pensions; outreach needed on preparing for estate planning and end-of-life care. Residents who are undocumented might not qualify for low-income housing. Spanish-speaking communities face issues of trust with CBOs.”

Grantees also utilized targeted interviews to gather expert opinions from elected officials and their staff, local agencies (e.g. AAAs, human service agencies, police departments, libraries, and Older Americans Act-funded agencies), providers (e.g. ILCs), CBOs and coalitions (e.g. Disability and Aging Coalitions), regional population specialists (e.g. experts on rural agriculture and migrant farm workers), and subject matter experts (e.g. housing, adult services, social workers, CalFresh, librarians, and police).

Focus Groups

Over half of grantees used focus groups in the form of listening sessions, town halls, and community forums. We use the terms 'focus groups' and 'listening sessions' interchangeably and define them as small gatherings of 15 or fewer participants, aimed at identifying unmet needs and exploring potential solutions. Grantees were strategic and deliberate in targeting diverse populations to engage, as shown in Table 2.

Table 2: Populations Engaged in Focus Groups

Population	Categories
Languages Spoken	English, Hmong, Spanish, Punjabi, Khmer, Tagalog
Ethnic/Cultural Background	Filipino, Cambodian, Hmong
Racial Identity	BIPOC, Native American, AAPI, Latino, African American
Religious Affiliation	Sikh, Muslim
Disability Status	General Disability, Blind
Socioeconomic Status	Low Income, Unhoused, Medi-Cal Recipients, Meals on Wheels Recipients
Gender/Sexual Orientation	LGBTQIA+
Geographic Location	Rural, Unincorporated Areas, Cities, Neighborhoods
Special Populations	Veterans, Family and Friend Caregivers, Incarcerated, Homebound Seniors
Age Groups	55+, 60+, 65+, adults of various ages with disabilities
Professionals Engaged	Mental Health, Disability and Aging Providers, Regional Experts, Professional Caregivers

Focus group participants were recruited through various methods, including community promotion, tailored outreach to retirement communities, diverse community venues and digital platforms. As participation in in-person focus groups can be challenging due to transportation access, several grantees emphasized their commitment to reach rural and underserved areas by partnering with local ambassadors such as Community Health Workers and Meals on Wheels.

Language was an important consideration during focus group recruitment. During LADAP office hours, one grantee shared that their participants emphasized the need to “Acknowledge and embrace diversity within diverse groups (e.g., AAPI group has more than 20 dialects)” and “Define terms to make sure you’re speaking the same language.”

Focus groups were held both in person and virtually. Promising practices observed during focus groups included: offering \$50 stipends and lunch to participants; involving older adults as co-facilitators; and training LADAP Advisory Committee members in focus group facilitation, allowing them to lead sessions.

Some grantees provided \$5,000-10,000 grants to CBOs serving underrepresented populations. This approach ensured that focus group facilitators had the necessary linguistic and cultural competence, helping to engage targeted populations effectively, build lasting relationships with diverse communities, and reducing costs for translators and interpreters. While this method proved effective, some grantees encountered challenges in securing commitments from CBOs to host focus groups, ensuring timely distribution of grants, addressing staff availability and restrictions on access to contact lists of older adults for recruitment. Despite these challenges, grantees found focus groups to be valuable for gathering needs assessment data as well as building trust, fostering relationships, maintaining ongoing dialogue with community members, and engaging with CBOs and city and county offices. However, building trust takes time, consistency, and meaningful engagement.

Town Halls

In this report, we use the terms ‘town halls’ and ‘community forums’ interchangeably and define them as gatherings involving 15 or more participants using various formats such as roundtables, traditional meetings, or breakout sessions. Town halls and community forums feature a more open structure, where not all attendees have a chance to voice their thoughts directly. These events focus on collecting input on unmet needs and potential solutions or on gathering feedback on regional LADAP needs assessment findings, goals, priorities, and initiatives. More than half of grantees used this approach. Target populations for these town halls were diverse, as shown in Table 3.

Table 3: Populations Engaged in Town Halls and Community Forums

Individuals with Lived Experience	Professionals
<ul style="list-style-type: none"> – Individuals with developmental disabilities – Unhoused individuals – Residents of remote areas – People receiving food at congregate meal venues and distribution events – Caregivers at senior centers 	<ul style="list-style-type: none"> – City and county officials – Older American’s Act-funded partners – Community based organizations – Service providers – Advisory boards and commissions

One grantee used written surveys and small group discussions at the beginning of their town hall to stimulate engagement, interest in the LADAP initiative, and sharing thoughts and ideas:

“Attendees were given time to complete each question and then participated in group discussions, which facilitated a rich dialogue. Representatives from each group were selected to present their group’s collective insights. This method ensured that every participant could voice their opinions. All completed worksheets were collected at the end of the meetings, providing us with comprehensive feedback and valuable data for our planning processes. The town hall meetings specifically served to raise awareness about the LADAP initiative and provided a forum for attendees to ask questions and share preliminary thoughts on critical issues affecting aging and disabled residents. These sessions were distinct in their focus on broad community engagement and information dissemination.”

There are challenges towards holding in-person events though. For example, some grantees offered optional language translation at the town hall events; however, there were no requests for translation services, meaning monolingual speakers may not be participating in the events. Additionally, individuals may not have easy access to transportation for participation in in-person events.

Surveys

At least 11 grantees distributed surveys to their communities to inform their Local Plans. Surveys refer to instruments specifically designed to inform the LADAP, rather than existing data collected for other purposes. Survey design varied among grantees: one used the AARP Livability Survey directly, seven adapted the AARP Livability Survey to better fit their community, and six developed their own surveys. As shown in Table 4, while the surveys targeted diverse populations, they were not as focused as those recruited for focus groups and listening sessions (refer to Table 2). However, one grantee broadened the language options for their needs assessment to seven languages (unspecified) to enhance their outreach capabilities.

Table 4: Populations Surveyed to Inform Local Plans

Population	Categories
Languages Spoken	English, Spanish, Mandarin
Disability Status	General Disability, Adults 18+ with Disabilities, Parents of Children with Disabilities
Socioeconomic Status	Low Income
Gender/Sexual Orientation	LGBTQIA+
Geographic Location	Rural
Status	Family and Friend Caregivers
Age Groups	45+, 50+, 65+
Professional Roles	Community Advocates

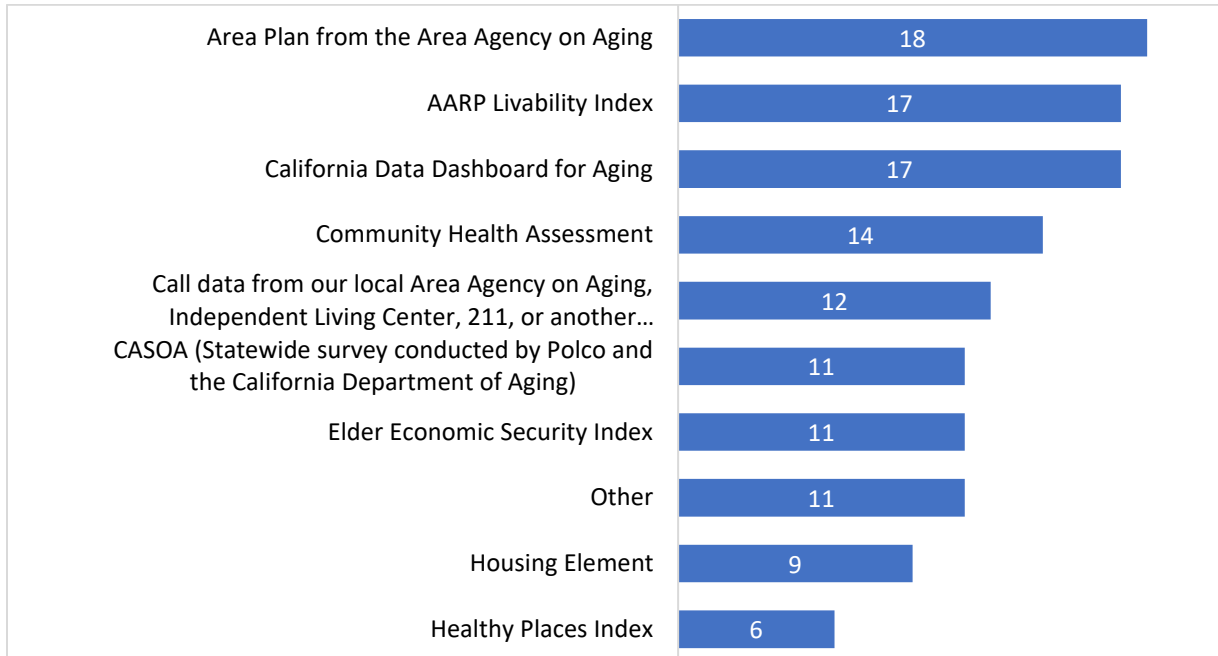
Grantees employed various methods to recruit participants and disseminate the surveys including: online, telephone, in-person distribution at community events, through partner agencies and stakeholders, and digital means. These various methods were necessary to promote inclusion - engaging hard to reach populations and providing surveys in an accessible form. To address issues of mistrust associated with telephone recruitment, one grantee chose to conduct calls through a reputable organization. Another grantee utilized census data to pinpoint residents for mailing their needs assessment survey along with a corresponding QR code. Furthermore, some grantees used targeted outreach, particularly to recruit underrepresented voices.

Promising practices for survey design and collection included obtaining preliminary feedback from the Advisory Committee on survey accessibility, providing updates and incentives (e.g., gift cards) to participants, and using the online survey platform to publicly share findings. However, even with thoughtful consideration during the survey design and collection phase, grantees encountered several challenges related to the survey process, including ensuring representation, distribution delays, and fraudulent online responses.

Existing Data

Grantees leveraged existing data to establish a baseline understanding of the demographics and experiences of older adults and persons living with disabilities in their region. Some grantees highlighted the importance of sharing data with surrounding regions to minimize the duplication of efforts and response burden. Grantees used diverse sources of data, shown in Figure 9.

Figure 9: “What other data sources have you used to inform your LADAP?” (Select all that apply) (N=21)



Some grantees partnered with their Public Health Department’s Healthy Brain Initiative or planned to collect data using the ATT program’s Social Isolation Survey. Additionally, grantees enlisted undergraduate researchers from local universities to compile and aggregate findings. Using various forms of existing data, some grantees created comprehensive policy scans, resource inventories, or data maps. Grantees utilized existing data for several key purposes including gathering baseline information to guide planning, provide additional contextual insights, develop strategies for outreach and to compare new data with existing information.

Objective 4: Select Goals & Priority Initiatives

Setting priorities, selecting goals, identifying implementation leads, and establishing timelines with measurable outcomes are essential components of developing actionable Local Plans. The process is often iterative, initially identifying key priorities to guide the needs assessment, and then refining priorities in response to needs assessment findings and the input of constituents including the Advisory Committees. Many grantees are still finalizing their priorities. Broadly, there were four main approaches grantees used to guide their priority-setting process:

- 1. Top-Down:** This approach uses the California Master Plan for Aging’s Five Bold Goals or AARP’s 8 Domains of Livability to guide selection of priorities.
- 2. Bottom-Up:** This approach begins by conducting a community needs assessment then using the findings to identify key needs within the community.
- 3. Existing Initiatives:** This approach examines existing aging and disability initiatives within the community and works on bolstering them by incorporating new lenses (e.g., disability or more diverse perspectives).
- 4. Systematic Change:** This approach focuses on systems change that may span many domains and priorities. Grantees taking this approach may have many priorities identified because they are all impacted by the larger systems change being proposed. As one grantee described:

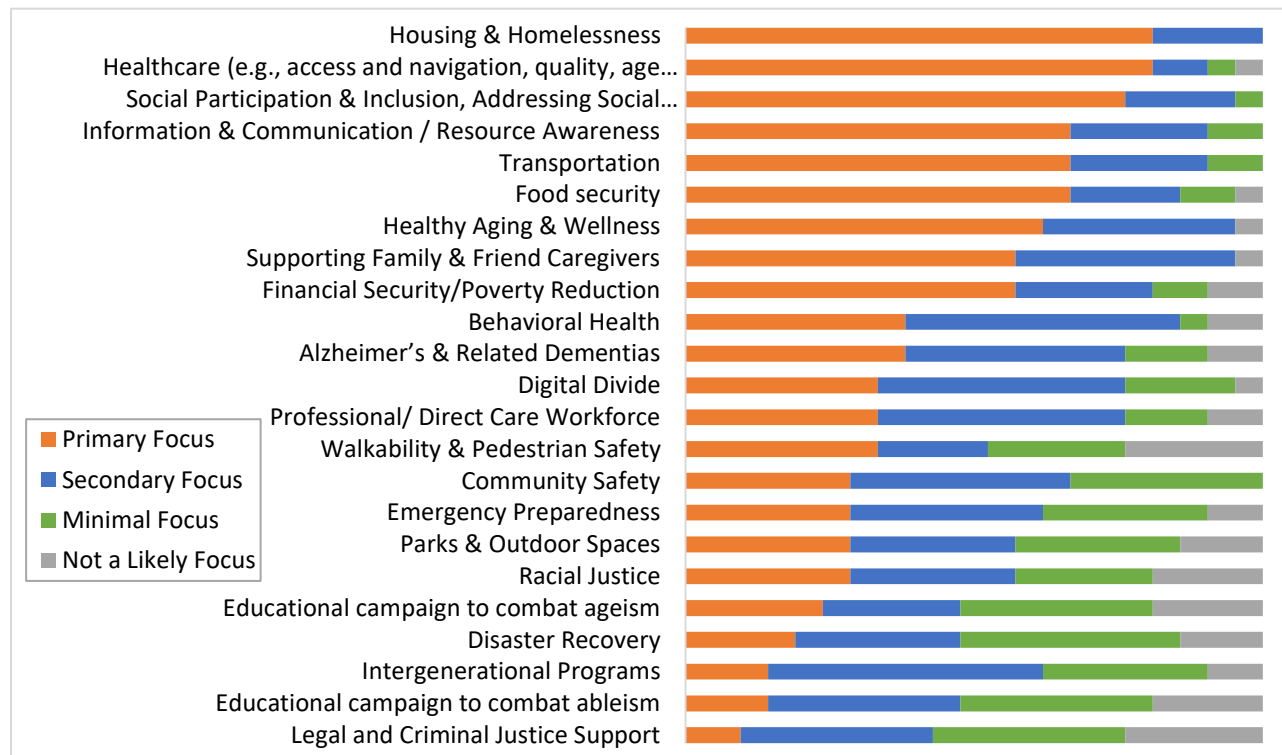
“We've had funders before that have forced us into picking three things or picking two things, and we're like, okay. We'll do that, but we're really working on 25 different things with our big cross sector collaborative. Then you're only gonna see this little tiny picture of what we're doing, and what we really want to do and love to share is our systems approach and the big picture stuff that we're working on.”

Identifying Initial Needs Assessment Priorities

Grantees identified between 3 and 15 feasible priorities. Those pursuing a systemic change approach expressed an intent to engage with a broader range of priorities, while others prefer to focus on fewer areas but address them more comprehensively. Regardless of the number of priorities selected, grantees emphasized the importance of adaptability, acknowledging that community populations and needs will evolve over time. They view the Local Plan as a 'living document'—a flexible guide that will provide direction for years to come.

The top priorities have slightly shifted since our February report. This is due to the addition of Phase II data and four Phase I grantees adapting their priorities based on their needs assessment findings. Notably, housing and homelessness is now the highest priority, and professional/direct care workforce and disaster recovery both moved up on the priority list. Transportation moved slightly down the list. Several priorities were ranked lower in this round including community safety, racial justice, social participation & inclusion, and an educational campaign to combat ableism. Healthcare, food security, supporting family & friend caregivers, financial security/poverty reduction, and intergenerational programs did not change in ranking since the last report and all other priorities only increased or decreased minimally.

Figure 10: What priority areas do you anticipate that your LADAP will focus on? (N=21)



The Advisory Committees grappled with choosing among the many important or urgent priorities of those who are aging, living with disabilities and caregiving in their community. Grantees rose to the challenge by aligning priorities with existing initiatives in the region (e.g., Blue Zone Projects, Healthy Brain Initiatives). This kind of alignment requires significant effort but also helped the Advisory Committee feel less overwhelmed about solving all the problems in their community. In addition to aligning with existing regional initiatives, grantees also considered sources for implementation funding and fluctuating political agendas in their region as they selected their priorities.

Refining Priorities Post-Needs Assessment

Needs assessment findings play a crucial role in refining Local Plan priorities. Grantees engaged their Advisory Committees, local government, community members, and/or responded to environmental context, such as natural disasters and emergencies, to refine their LADAP priorities.

Identifying and narrowing priorities post needs-assessment felt overwhelming as community members shared many pressing needs. When identifying priorities and the next steps associated with them, grantees considered:

- What changes and domains can the grantee impact—some projects are complex or best addressed at different governing levels or by diverse types of organizations.
- Does the community have existing aging or disability priorities they are working on?
- Is there existing or forthcoming funding for particular priorities or projects?
- Who are the existing community champions for aging and disability activities and should they be invited on to the Advisory Committee or into a working group?
- Do the selected priorities have champions or leaders?
- Are the priorities and related actions S.M.A.R.T. (specific, measurable, achievable, relevant, and time-anchored)?

Several grantees plan to launch working groups to develop their action plans after their AC reviews the needs assessment findings and identifies priorities. The LADAP process of identifying evidence-informed priorities inspired grantees to form new partnerships with non-traditional collaborators, enabling them to address needs more effectively within specific focus areas or domains.

Objective 5: Build the Local Plan and Objective 6: Gain Approval, Publicly Release and Promote the Local Plan

The expected outcome for LADAP grantees is to develop one community-specific and community-informed Local Plan. Among the 21 grantees, 18 aim to create a single Local Plan, one grantee plans to develop two separate plans for two counties, another is creating a template for multiple Local Plans across their nine-county region, and the final grantee is producing four plans for four cities within their county.

During this reporting period, one Local Plan was successfully completed and approved by AARP. This plan featured a comprehensive implementation agenda with 26 strategies and 64 activities. Each strategy was assigned to specific municipal departments, with recommended partners also identified. Evaluation of each strategy will use a completed/not completed metric. Additionally, two LADAP grantees began drafting their Local Plans during this period.

With eight months remaining in the LADAP grant program, now is a critical time to focus technical assistance on helping grantees develop actionable Local Plans. Some grantees expressed concerns about launching their plans during a tight budget year, and others reported difficulties engaging partner agencies in committing to lead or support specific action items. It is essential to discuss sustainability strategies, explore options for implementation that do not require funding, and identify potential funding sources for those that do.

As more Local Plans are developed, it will be crucial to identify alignment among them, track promising policies, programs, and practices that could be scaled, and seek opportunities to align local and statewide efforts to enhance outcomes and improve coordination.

Sustainability Strategies

As previously reported, grantees from Phases I and II were asked to commit to up to ten sustainability strategies through the pre-survey. Figure 11 indicates the most endorsed intended strategies to ensure their Local Plans are sustainable. Additional strategies are emerging. Some grantees plan to bring aging and disability issues to the fore in their community by highlighting the lived experience of residents, noting that storytelling can be a compelling element to increase “credibility” of the movement and create motivation “to make real change.” Many grantees describe efforts to bring heightened awareness among community leaders, for example by encouraging local candidates to champion aging issues as part of their platforms during an election year or meeting repeatedly with city staff to discuss elements of their LADAP and solicit feedback.

A potential challenge for some grantees may be their delegation to a consultant for cross-sector engagement with community leaders. With adequate time and resources, a focused effort by grantees and their Advisory Committees to foster meaningful engagement could help them “find a shared momentum” and strengthen long-term commitment to the Local Plan.

Figure 11: Sustainability Strategies (N=21)

By March 2025...	Yes	No
we hope to develop a strengthened network of organizations collaborating to support older adults, people with disabilities, and/or caregivers in our community	21	0
we hope to obtain increased visibility of age and disability friendly champions and issues in our community.	20	1
we hope to identify one or more agencies in our community that will take on the responsibility for continued oversight and/or implementation of the LADAP, or elements of the LADAP.	18	3
we hope to have a LADAP in place that aligns aging and disability services and systems to be more user-centered and efficient.	18	3
we hope to obtain a City or County Resolution or Proclamation in support of our LADAP.	18	3
we hope to obtain a commitment to new or expanded programs within our agency or partner agencies that support our LADAP priority areas.	17	4
we hope to obtain additional funding to implement and/or evaluate our community's LADAP.	17	4
we hope to implement a tracking system to monitor progress of our LADAP beyond the CDA grant period.	15	6
we hope to secure staff that will be responsible for sustaining and implementing our LADAP beyond the CDA grant period.	14	7
we hope to propose or secure new or expanded policies/ regulations at the City/ County levels.	14	7

Grantees described how shifts in the funding landscape can either strengthen or threaten the long-term stability of their Local Plan. One grantee noted that several funding sources (e.g., CACHI, community foundations, private philanthropy) can be woven into “the broader philosophy of the Master Plan for Aging of intergenerational community, of aging and disability resource connection.” Another grantee noted they did not have any financial commitments from local government, but that they will explore “interstate, private, and foundation grant and award opportunities to keep our current activities and future selected projects in motion.”

Several grantees designed their Local Plan with structure for sustainability, to ensure continued success. For example, one AC will regularly evaluate the progress being made and develop “comprehensive and effective strategies” to adjust their activities as needed. Because the community needs will evolve over time, with priorities shifting from generation to generation, the Local Plan needs to be a living document. One Local Plan is formed as a set of guidelines, for the future and for use by other jurisdictions, in the hope of effecting lasting change in the region.

“Having a plan is great, but the plan really doesn't matter if we don't create some systemic changes and improve or expand what we're already doing. Without that expansion and sustainability of the programs, what's the point?”

“Without community ownership, it's just a slogan or a website or a report. Community ownership is everything, but it can't just be community ownership. You've got to have dedicated behind-the-scenes county, city, or even nonprofit staff maintaining things. There's websites to be maintained. There's publications to be updated. All that behind-the-scenes work that county staff do every day.”

Engagement with Technical Assistance

The LADAP Grant Program Office Hours and Learning Labs covered a wide range of topics, featuring grantee spotlights and guest presenters, as detailed in the Appendix. These sessions fostered high engagement, with participants actively asking questions and sharing experiences. Regular opportunities to learn from and support one another were particularly valuable, especially for Phase II grantees who benefited from the insights of Phase I grantees. One grantee mentioned:

“The best gift, conversations—ongoing conversations—and somebody outside of your own bubble to have those conversations with, 'cause we get stuck with where we are.”

Seven of the 20 grantee agencies attended all 12 sessions, while attendance at individual sessions ranged from 18 to 35 participants, representing 14 to 19 grantee agencies. However, one agency (a Phase II grantee) participated in only 3 of the 12 sessions. This presents an opportunity to reach out to less engaged agencies to better understand their barriers to participation.

In total, 79 unique individuals attended at least one session. Most participants were staff (62%), followed by finance professionals (20%), consultants (12%), and partners (e.g., AC or work group members) (6%). Notably, 6 participants attended 11 or more sessions, reflecting strong commitment. Consistent attendance fostered relationship-building and increased the likelihood of collaboration beyond the structured Office Hours and Learning Labs.

Conversely, 25 participants only attended one session, with partners, consultants, and finance professionals being least likely to return. Some grantee agencies encouraged multiple representatives to participate, with as many as six representatives from a single agency attending one of the sessions in this reporting period.

Of the four Learning Labs conducted, 36 out of 102 participants completed feedback surveys, with positive responses overall. As shown in Figures 12 and 13, 56% of attendees found the Learning Labs very productive and 78% considered them highly relevant. Additionally, survey respondents reported they would apply lessons from the Learning Lab to their local communities, felt more connected to regional LADAP efforts, identified added resources and contacts for their community needs assessments, felt more energized in their LADAP work, and/or identified topics they hope to explore further.

Figure 12: How productive would you say this meeting was?

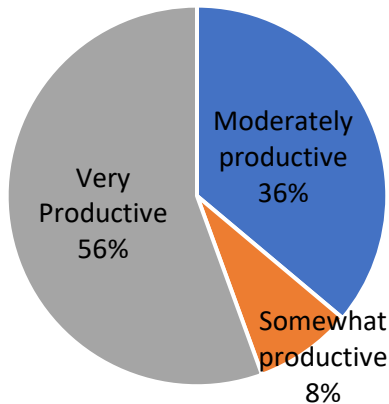
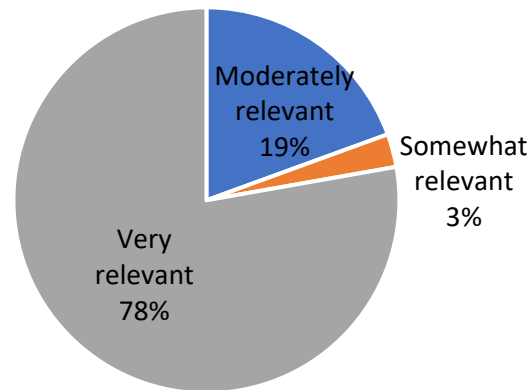


Figure 13: How would you rate the relevance of this meeting to your age-friendly work?



IV. Conclusion / Recommendations

The 21 LADAP grantees customized their awareness efforts, community assessment strategies, and implementation plans to fit their unique communities. They made intentional efforts to engage cross-sector local leaders who can act as bridges to diverse sectors and underserved geographic and demographic communities. These partners included elected officials, government staff, AAAs, ILCs, CBOs, libraries, private sector partners, philanthropic organizations, and more.

Grantees had various starting points and varied in their progress on LADAP workplans. As shown in Figure 1, two grantees were still forming their Advisory Committees, and three-quarters were either yet to begin or were conducting community needs assessments. Only two grantees completed the selection of their goals and priority initiatives, and only one Local Plan was completed. LADAP grantees set ambitious work plans and will need ongoing, focused efforts to finalize actionable Local Plans. Technical assistance through LADAP Office Hours and Learning Labs will remain crucial, providing opportunities for statewide resource sharing and capacity building. Inter-grantee communication was invaluable for exchanging strategies and lessons learned.

CDA's LADAP grant program has already gained national recognition as a pioneering initiative, highlighting the feasibility and importance of investing in leadership and public-private partnerships at multiple system levels to create communities that are inclusive for people of all ages and abilities. As highlighted by our partners at the Hub for Aging Collaboration at Rutgers University:

“The policy and practice innovations emerging from the program have strong potential to serve as a model for other states, especially considering growing interest in aligning local age-friendly planning efforts with State Multisectoral Plans on Aging.”

This national interest is demonstrated through several examples:

- At the 2024 Grantmakers in Aging conference, CDA’s MPA philanthropic partners invited our team to present on California’s local MPA efforts.
- Following the publication of New Jersey’s statewide blueprint for age-friendly communities, the New Jersey Department of Human Services is in the process of launching a \$5 million grant program to support local age-friendly planning efforts like California’s LADAP grant program. Our team at UC Davis is excited to explore opportunities to be involved as potential subgrantees in this new initiative in continued partnership with colleagues at Rutgers University, facilitating shared learning between California and New Jersey through 2026.
- The American Society on Aging accepted two proposals highlighting the LADAP grant program for their April 2025 conference:
 - The first, *“Bridging Ageism and Ableism to Shift Mindsets and Fuel a National Movement,”* will feature a LADAP grantee alongside the Connecticut Age Well Collaborative, sharing strategies, lessons learned, and tools for building stronger alliances against ageism and ableism.
 - The second, *“Developing an Age-Friendly Community of Practice to Advance Equity,”* will showcase how CDA’s LADAP grantmaking program and the New York Academy of Medicine’s “Age-Friendly: Go Local” initiative are promoting aging equity by centering historically marginalized older adults—such as those in poverty, rural areas, with disabilities, and from racial/ethnic minority groups—in age-friendly planning.

State leaders who presented at the *CA for All Ages & Abilities: 2024 MPA Day of Action* emphasized the importance of tailoring state MPA implementation to the diverse regions of California, considering the unique geographies, demographics, and service barriers present. The LADAP grant program offers a structure to facilitate communication and coordination between state and local efforts. As the program progresses, it will be important to assess the multifaceted ways in which the work and its impact are sustained, including monitoring how grantees address potential implementation gaps after the LADAP grant concludes. Establishing a structure for continued shared learning among local and state leaders would continue the momentum beyond the grant period. Overall, grantees are optimistic about the future and enthusiastic about their role in supporting the statewide Master Plan for Aging.

To continue to support Local Planning efforts, we propose six recommendations as follows:

1. Continue to facilitate inter-grantee relationships and knowledge sharing through Office Hours and Learning Labs. Consider reaching out to grantees with low attendance to better understand barriers to participation.
2. Encourage grantees to focus their remaining time on refining actionable priorities, including identifying resources, funding, leadership, and staffing needs for plan implementation. Facilitate discussion of local sustainability strategies, including exploring options for implementation that do not require funding, and identifying potential funding sources for those that do.
3. Provide additional guidance on evaluation metrics for plan implementation, through an Office Hours session or Learning Lab, to help grantees make use of existing resources such as Canada’s [Age-Friendly Communities Evaluation Guide](#) and the World Health Organization’s guide, [“Measuring the Age Friendliness of Cities: a Guide to Using Core Indicators.”](#)

4. Continue identifying opportunities for local planning efforts to inform statewide MPA initiatives, for example, by tracking local priorities, analyzing variations across regions, and reviewing promising policies, programs, and practices for scalability. As more Local Plans are developed, identify alignment among them, track promising policies, programs, and practices that could be scaled, and seek opportunities to align local and statewide efforts to enhance outcomes and improve coordination.
5. Explore strategies for CDA to promote the sustainability of local planning and implementation efforts beyond the LADAP grant program.
6. Consider establishing a structure that enables continued shared learning opportunities across local regions beyond the LADAP grant program.

Appendix A: Advisory Committee Composition

Advisory Committee Demographic Survey Results (N=208)

Figure 14: Age of Advisory Committee Members

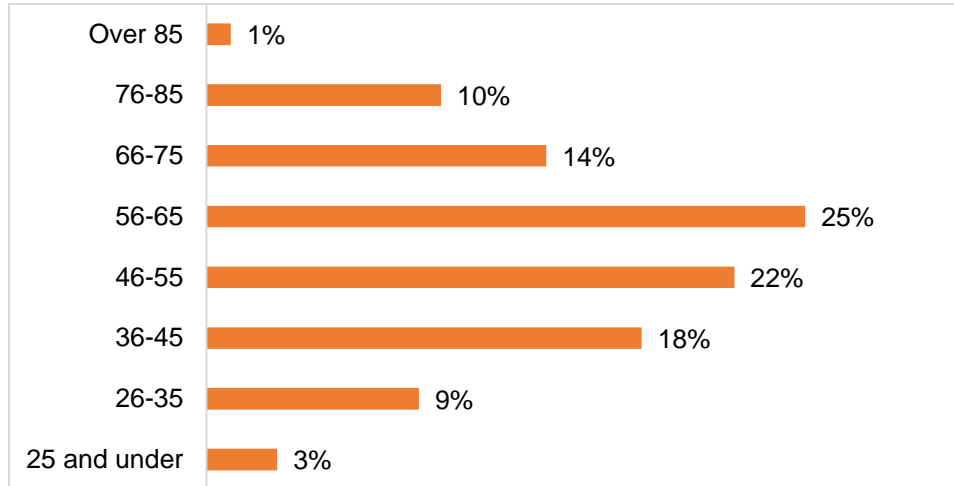


Figure 15: Gender Identity of Advisory Committee Members

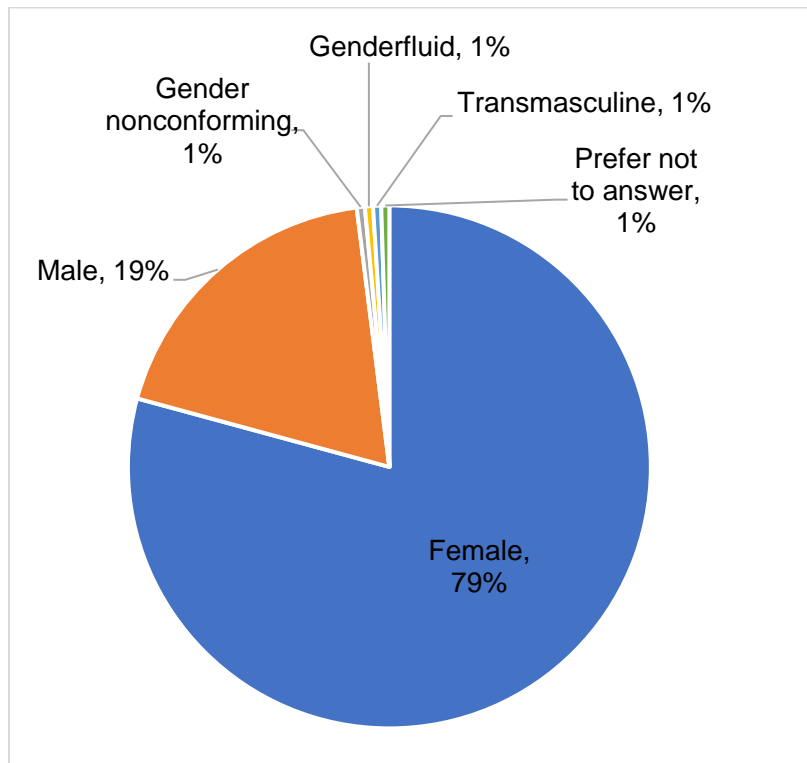


Figure 16: Sexual Orientation of Advisory Committee Members

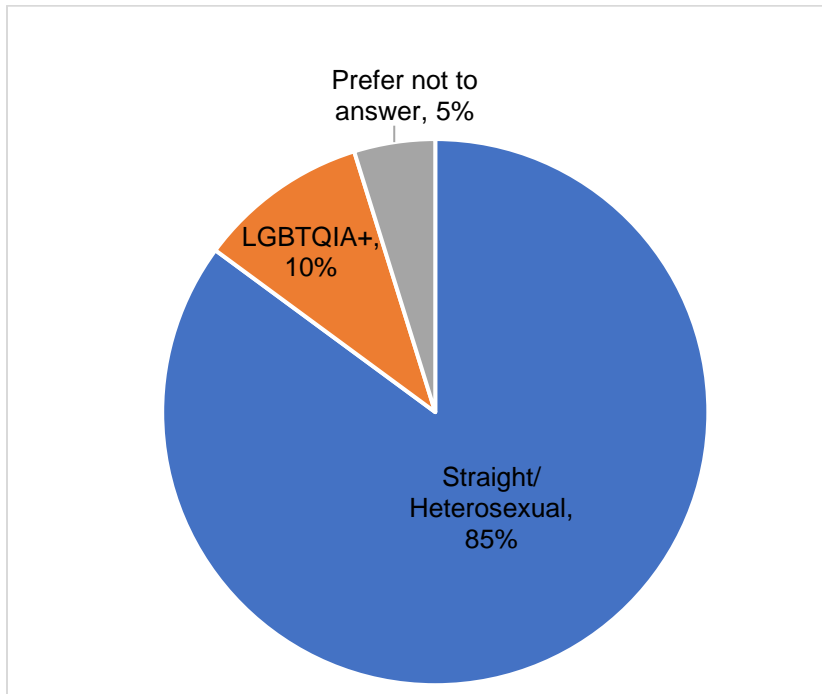
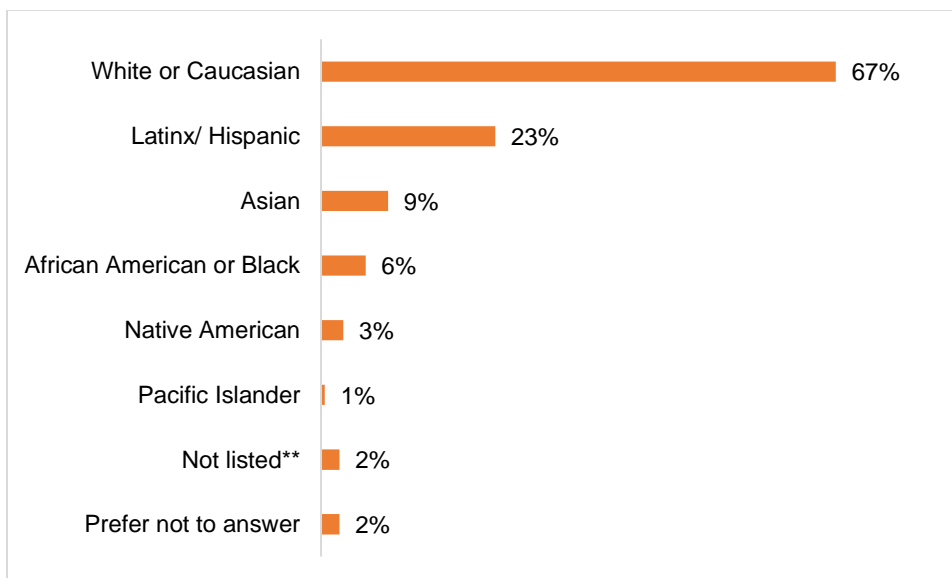


Figure 17: Advisory Committee Members' Racial or Ethnic Identity*



* Categories are not exclusive.

** One individual indicated they were Portuguese, and one indicated they were Filipino.

Figure 18: Advisory Committee Members' Caregiver Status

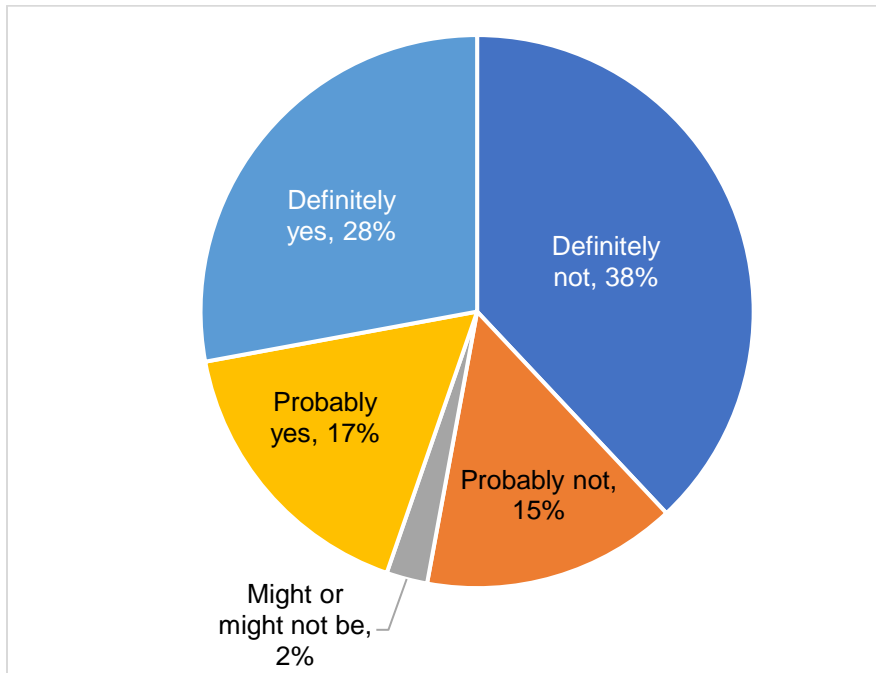
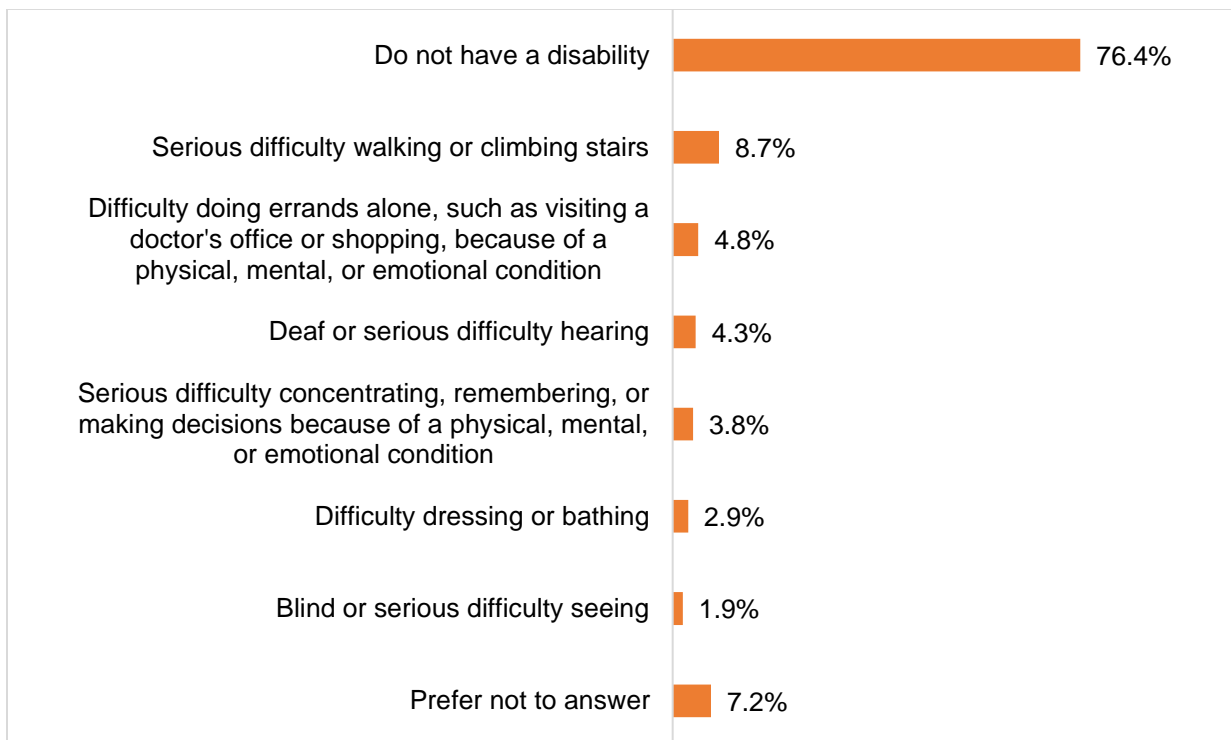


Figure 19: Advisory Committee Members' Self-Reported Disabilities



Appendix B: Topics and Engagement in Technical Assistance Meetings

Date	Topics Covered	# Registered	# Attended	# of Sites (N=20)
2/1/24 Learning Lab	<ul style="list-style-type: none"> Introduction of Phase II grantees Sample City and County Age Friendly Action Plans Review of requirements from CDA and AARP for the Local Plans 	37	32	19
2/13/24 Office Hours	<ul style="list-style-type: none"> Ensuring a disability-friendly lens in your LADAP initiative Grantee spotlight: Marin Aging & Disability Institute (MADI) shared their new curriculum on ageism and ableism for municipal staff and community members 	29	25	16
3/12/24 Office Hours	<ul style="list-style-type: none"> Grantee Spotlight: Inland Caregiver Resource Center/ Inland Coalition on Aging presented their marketing and awareness strategies for LADAP Breakout discussions: LADAP awareness efforts 	33	31	16
4/4/24 Learning Lab	<ul style="list-style-type: none"> Guest Speakers: Emily Greenfield, PhD and Natalie Pope, PhD(c), Hub for Aging Collaboration at Rutgers University presented on lessons learned and insights from supporting 8 age friendly communities over 7 years They introduced the six conditions of systems change from the Water Systems of Change model as a framework to evaluate LADAP impact and sustainability Breakout discussions: Brainstorming sample action items related to the six conditions of systems change 	33	31	16
4/9/24 Office Hours	<ul style="list-style-type: none"> Grantee Spotlight: Independent Living Resource Center (ILRC) Santa Barbara / Adult & Aging Network presented on their LADAP initiative, with a focus on strategies for success in planning their MPA / LADAP public convening UC Davis team reported back LADAP grantees' awareness and community assessment activities based on grantees' most recent progress reports 	15	32	18
5/14/24 Office Hours	<ul style="list-style-type: none"> Guest Speaker: Rafi Nazarians, Advocacy Director, AARP CA Benefits & requirements of joining AARP Age Friendly Network 	17	32	18

Date	Topics Covered	# Registered	# Attended	# of Sites (N=20)
	<ul style="list-style-type: none"> The 5-year Age Friendly cycle AARP resources: community challenge grant, livability surveys, listening session toolkit, statewide roundtables, and informational handouts and reports 			
6/6/24 Learning Lab	<ul style="list-style-type: none"> Grantee Spotlight: Solano County shared about forming their advisory committee and conducting their community needs assessments in Solano and Napa Counties 	30	21	14
6/11/24 Office Hours	<ul style="list-style-type: none"> Grantee Spotlight: Sonoma County shared about forming their LADAP Advisory Committee, conducting an inclusive community assessment, and lessons learned to date 	18	24	14
7/9/24 Office Hours	<ul style="list-style-type: none"> CDA LADAP progress report grantee requirements 	36	35	17
8/1/24 Learning Lab	<ul style="list-style-type: none"> Guest Speaker: Diana Miller, former Project Manager, Seniors Agenda, Santa Clara County Following the LADAP grantees' top 10 priorities (e.g., social participation, food security, healthcare), Diana shared examples of programs or policies that were implemented, expanded, or transformed in Santa Clara County over 11 years and strategies for success 	25	18	14
8/13/24 Office Hours	<ul style="list-style-type: none"> Grantee Spotlight: Alliance on Aging presented on their LADAP initiative, including their staffing and Advisory Committee model, awareness activities, needs assessment and asset inventory strategies 	31	24	15
9/10/24 Office Hours	<ul style="list-style-type: none"> Guest Speaker: Rafi Nazarians, Advocacy Director, AARP CA briefly reviewed the process to join the Age Friendly Network Grantee Spotlight: Stanislaus County and the City of Santa Monica shared their experiences of recently joining the AARP network 	33	31	15