



Memorandum

TO: HONORABLE MAYOR AND
CITY COUNCIL

FROM: Albert Balagso

SUBJECT: SEE BELOW

DATE: 05-29-07

Approved

Ray Wmiv

Date

6/3/07

COUNCIL DISTRICT: City-Wide
SNI AREA:

SUBJECT: APPROVE A RESOLUTION ADOPTING THE CITY'S RESPONSE TO THE CIVIL GRAND JURY'S FINAL REPORT "THE TEN-YEAR PLAN TO ADVANCE THE WELL-BEING OF SENIOR CITIZENS FALLS SHORT OF IT'S GOAL"

RECOMMENDATION

Staff recommends the City Council approve a resolution adopting the City's response to the 2006-07 Santa Clara County Civil Grand Jury's report entitled "The Ten-Year Plan to Advance the Well-Being of Senior Citizens Falls Short of Its Goal" issued on April 23, 2007.

OUTCOME

Adoption of the resolution enables the City to respond to the Civil Grand Jury and satisfies the requirements of California Penal Code § 933(c), which requires a response no later than Wednesday, July 25, 2007.

EXECUTIVE SUMMARY

The Santa Clara County Civil Grand Jury reviews and evaluates procedures, methods, and systems utilized by county/city government to determine whether more efficient and economical programs may be employed. The Civil Grand Jury investigated the status of various recommendations outlined in the Aging Strategic Plan entitled "Community for a Lifetime: A Ten-Year Strategic Plan to Advance the Well-Being of Santa Clara County's Older Adults." The City of San José and the County of Santa Clara adopted this Plan in February 2005.

The Civil Grand Jury's Final Report, entitled "The Ten-Year Plan to Advance the Well-Being of Senior Citizens Falls Short of Its Goal," reported several findings and recommendations. The Department of Parks, Recreation, and Neighborhood Services (PRNS) partially disagrees with some of the Civil Grand Jury's findings. The County's Department of Aging and Adult Services also disagrees with the Civil Grand Jury's findings and will be preparing a response for adoption by the Santa Clara County Board of Supervisors.

The Civil Grand Jury's findings and recommendations, which are discussed in detail in the Analysis Section of this memo, can be summarized as follows:

Summary of Civil Grand Jury Findings:

The Civil Grand Jury's investigation found that less than half of the Ten-Year Strategic Plan's goals were completed, no timelines exist for the Plan's goals, and postulated that failures to accomplish the Plan's goals were the result of a lack of leadership and cooperation between the various agencies charged by the Plan to serve the needs of Santa Clara County senior citizens.

Staff would like to bring to the Civil Grand Jury's attention some accomplishments, and describe a significant body of work that has taken place since its investigation in August of 2006.

The Civil Grand Jury noted that the Leadership Group tasked by the Plan to coordinate leadership and advocacy for senior services has failed to function, as the group has met "only once since December 2006." The Leadership Group faced delays in forming due to challenges posed by the City and County's severe lack of budget resources, City PRNS top management vacancies, and the diminished health and funding climate of the local nonprofit sector. These initial delays, however, did not stop these agencies from individually pursuing the Plans goals.

The Director of PRNS and the Director of the County's Department of Aging and Adult Services (DASS) convened a smaller Executive Council to overcome the difficulty in getting the larger "Leadership Group" to meet and to promote the implementation of the Plan. The Executive Council has been meeting twice monthly since August 2006 to keep moving forward on the implementation of the Plan. Furthermore, Catholic Charities of Santa Clara County recently hired a part-time Project Manager to manage implementation of the Plan and to reconstitute the Leadership Group. Collaborative progress has been made in other areas including training of Senior Center Volunteers, Office on Aging linking to the Networkofcare.org web site, and the launch of the countywide "211" resource hotline.

Summary of Civil Grand Jury Recommendations

The Civil Grand Jury recommended the immediate establishment of a Joint Powers Authority (JPA), and timelines for the implementation of the Plan's Immediate (and Mid- and Long-Term) Goals.

The Executive Council, tackling the task outlined for the Leadership Group to assess the Plan's feasibility of creating a JPA, determined that a JPA was not feasible in light of the dire budget conditions facing City, County, and nonprofit agencies. The Department of Parks, Recreation, and Neighborhood Services concurs with the Executive Council's determination.

While the Department of Parks, Recreation, and Neighborhood Services agrees that no timelines exist for the implementation of the Immediate Goals, the lack of timetables has not prevented the advancement of the goals. Moreover, PRNS staff will recommend to the Executive Council and Leadership Group that they establish a timeline to address the advancement of the goals.

BACKGROUND

By 2020, the number of Santa Clara County seniors could double to a projected 428,300 or 21% of the population. Of significance, the 85+ age group could almost triple. To meet the needs of this "Aging Tsunami," the City of San José has integrated the Plan's strategic vision and goals into its program budget planning. The City provides a combined \$6.7 million in PRNS and Healthy Neighborhood Venture Fund Program (HNVF) funded services. Through PRNS, the City provides approximately \$5.7 million to senior-related programs city-wide. This funding supports the City's Office On Aging and the operation of 12 senior centers. Through HNVF, the City provides \$1 million to nonprofit agencies to improve the quality of life for seniors.

The San Jose City Council, in June 2001, adopted a resolution to develop a senior services strategic plan. The County of Santa Clara joined in this effort. MGT of America, a consulting firm, was retained in 2004 to identify the needs of older adults and to develop a plan to address those needs. Over 1,100 community members participated in the strategic plan process which included a scientific phone survey, town hall meetings, focus groups, interviews conducted in the five most prominent languages (English, Spanish, Mandarin, Vietnamese, and Tagalog), and also in American Sign Language.

Both City Council and the County Board of Supervisors adopted the resulting strategic plan in February 2005. The plan recommended the convening of a Leadership Group of funders and policy makers, and a Service Coordination and Advocacy Group to represent a broad coalition of organizations that serve older adults. While the Plan specified immediate, intermediate, and long term strategies to address the identified needs, the Plan cautioned that it would not be feasible to pursue all strategies simultaneously and that these strategies require further prioritization in order to focus resources most effectively.

The following is a detailed response to the Civil Grand Jury's findings and recommendations for Council consideration and approval. The response complies with Penal Code §933(c), which requires the City Council to respond to the Civil Grand Jury report no later than 90 days after the Civil Grand Jury submits its final report.

ANALYSIS

The Civil Grand Jury issued the following findings. The City's responses to the Grand Jury's findings are detailed below. The Grand Jury's recommendations follow the Findings discussion.

Civil Grand Jury Findings:

- F1:** The Plan has stalled because of lack of cooperation between the various agencies compromising the Leadership Group,
- F2:** No timetable exists for the implementation of the Immediate Goals.
- F3:** The Mid-Term and Long-Term Goals are dependent upon the completion of the Immediate Goals and the coordinated allocation of resources.
- F4:** Only five of the twenty-four (sic) Intermediate Goals have been accomplished by cooperation of the agencies represented by the Leadership Group.
- F5:** The City of San José, acting independently, accomplished an additional six of the twenty-four (sic) Intermediate Goals for the citizens of San José.

Civil Grand Jury Finding 1:

The Plan has stalled because of a lack of cooperation between the various agencies comprising the Leadership Group.

PRNS Response to Civil Grand Jury Finding 1:

PRNS partially disagrees with this finding. While initial organizational difficulties delayed convening the Leadership Group, these delays did not thwart the City's, County's, nor nonprofit's undertaking of the Plans goals. On November 29, 2005, the City's Director of Parks, Recreation and Neighborhood Services and the Director of the County's Department of Aging and Adult Services (DASS) met to discuss the development of a smaller Executive Council, as called for in the Plan. The Executive Council's purpose was to jumpstart the process and help convene a larger "Leadership Group" of funders and policy makers, as called for in the Plan.

The following month (December 2005), PRNS and DASS senior management began the process to identify, brief, and interview members of the Executive Council to determine their level of interest and willingness to commit to the Plan's objectives. This process took approximately seven months to complete. The Executive Council has been meeting two times monthly since August 2006.

The Chief Executive Officer of United Way committed to facilitating the Executive Council. The seven member Executive Council included both funders and policy makers as recommended in the Plan, and is comprised of the Director of DASS, the Chief Executive Officer of United Way, the former chair from the City of San Jose Senior Citizens

Commission, the Deputy Director of PRNS, the Acting CEO of the Health Trust, the Executive Director of Council on Aging Silicon Valley, and the Assistant to the Under Secretary of the California Health and Human Services Agency. Policy aides to Supervisors Don Gage and Ken Yeager also attended the Executive Council meetings.

Parks, Recreation, and Neighborhood Services staff believes that the Executive Council has created a sound structure and action plan to advance the strategies identified in the Plan. The Executive Council identified Catholic Charities as the proposed fiscal agent. County of Santa Clara and nonprofit agencies have agreed to share costs, and City staff is processing an agreement to participate in the shared costs.

The Project Manager, hired by Catholic Charities in April 2007, has the specific task of moving the Plan forward by working closely with both the Executive Council and the re-established Leadership Group. The Project Manager is meeting with individual members of the Leadership Group to re-ignite commitment and enthusiasm and has scheduled June 28, 2007 as the next full Leadership Group meeting. In addition, preliminary discussions between both the Executive Council and Leadership Group members are taking place to establish a Service Coordination and Advocacy Group, as recommended in the Plan. The intent is to have the Service Coordination and Advocacy Group running by December 2007.

Civil Grand Jury Finding 2:

No timeline exists for the implementation of the Immediate Goals.

PRNS Response to Civil Grand Jury Finding 2:

While the Department of Parks, Recreation, and Neighborhood Services agrees that no timelines exist for the implementation of the Immediate Goals, PRNS wishes to emphasize that the lack of timelines has not prevented the implementation of the Immediate Goals.

Staff reviewed the Civil Grand Jury's "Status of Immediate Goals" and updated these goals based on accomplishments that have occurred since the Grand Jury's investigation (Attachment 1). These goals are further discussed below.

1. Convene Team of Partner Organizations

Status: Done

This team is comprised of representatives from the United Way of Silicon Valley, City of San José Office On Aging, County Department of Aging and Adult Services, Council on Aging, and Catholic Charities.

2. Establish Permanent Leadership Group

Status: Done

The City of San José and the County of Santa Clara established a smaller Executive Council to meet twice monthly to implement many of the tasks initially delegated to the

Leadership Group. The reconstituted Leadership Group meeting is scheduled for June 28, 2007. The Service Coordination and Advocacy Group will be launched by December 2007.

3. Unified Funding Applications and Joint Administration

Status: Not Done

The Executive Council determined this is a low priority, and will re-visit this issue with the Leadership Group.

4. Assess Creation of a Joint Power of Authority

Status: Done

The Executive Council determined that a JPA was not feasible and will be re-visited when the economic climate changes.

5. Form Service Coordination and Advocacy Group

Status: In Progress

The newly hired Project Manager is working closely with the Executive Council and Leadership Group to identify members to launch this group by December 2007.

6. Institute senior home repair consortium

Status: In Progress

The senior home repair consortium offers a single point of entry for clients to access a variety of home repair services. This effort requires a significant amount of agency coordination, funding, and will require further analysis and work. However, PRNS believes that a new program launched in 2007 entitled “Neighbor-to-Neighbor,” sponsored by Rebuilding Together (a community based organization) has greatly addressed this need. The Neighbor-to-Neighbor program provides a single point of service whereby a senior fills out a simple application to request specific home repairs. Rebuilding Together does an in-home assessment of the requested repairs and matches the client with volunteers to complete the work. This new program has been widely publicized to San Jose older adults who have shown great interest. Senior clients have been extremely satisfied and requests are quickly processed.

7. Support “211” Telephone Hotline for Resources for Older Adults

Status: Done

United Way of Silicon Valley completed this goal. The “211” Information and Assistance line was launched earlier this year, and has been widely promoted and utilized.

8. Disseminate Information on Resources

Status: Done

This goal has been completed and is on-going. The PRNS website includes links to other relevant web sites, and updated information on programs, services, and resources. Additionally, a Networkofcare.org website is linked with the City’s Council on Aging Silicon Valley.

9. Increase Distribution of Service Directory

Status: Done

The Council On Aging Silicon Valley has made the senior service directory widely available. Hard copies are distributed at all senior centers, and the directory is accessible online as well.

10. Networkofcare.org and Website Offerings

Status: Done

The Office On Aging has linked to the Networkofcare.org website. The website is promoted through the media, staff and volunteer training, and is now widely used.

11. Web page in each city and county website

Status: Done

The City and County's web page links to the Networkofcare.org website, as well as to other senior service resources.

12. Non-English Speaking Information Campaign

Status: Done

The Office On Aging completed a campaign to inform non-English speaking seniors about resources that are available to them. The Office On Aging translated resource materials into multiple languages; educational workshops are conducted in the senior's native language.

13. Subsidized Taxi Service

Status: Not Done

The subsidized taxi service, whereby local municipalities contract with taxi companies, has not been implemented due to budget constraints. The Leadership Group will conduct a needs assessment to evaluate its potential effectiveness once budget constraints ease. If this concept is economically feasible, the Leadership Group will commence coordination with municipal organizations and taxi companies to complete this strategy.

14. Broaden VTA Paratransit Eligibility

Status: In Progress

The enrollment process has been streamlined into a simple, one-page application that is easily understood by seniors and their families. The Leadership Group will schedule the broadening of the VTA eligibility criteria for further review.

15. "Bus Buddy" program

Status: Not Done

The "Bus Buddy" program whereby volunteers assist seniors in getting on and off the bus has not been implemented due to budget constraints and lack of staffing to organize the effort.

16. Transportation to/between Senior Centers

Status: Done

The PRNS Office On Aging provides ADA accessible vans for all its senior centers to transport seniors to and from programs and services.

17. Review Care Management Program

Status: Done

The Office On Aging established a network of care providers who are meeting quarterly since the adoption of the Plan. This county-wide group represents all agencies that provide “case management” type services. The group shares resources, identifies duplication and gaps in services, and addresses these issues to provide a stronger “safety net” and to assist more seniors.

18. Equip Senior Centers as caregiver information referral centers

Status: Done

The Office On Aging trained staff and key volunteers in community and senior centers on “how to” provide information and assistance to seniors, their families and caregivers. The latest resource materials for caregivers were incorporated into each senior center’s resource materials and the city-wide Older Adults Resource Center. Numerous caregiver support groups are hosted in senior centers.

19. Include caregiver support information on “211” services

Status: Done

Services and programs offered at senior centers are now included in the “211” information line.

20. Attract more healthcare professionals to geriatrics

Status: In Progress

Executive Council members continue to maintain active roles in statewide, regional, and local organizations that plan and develop social work education that prepare students for social work practice with elderly clients and their families within diverse communities. An Aging Summit convened following the 2005 California Social Work Education Center (CalSWEC) conference. An outcome of the Aging Summit was the creation of a proposal, funded by the Archstone Foundation, to improve the care of California’s older adults by creating an expanded and well prepared labor force of geriatric social workers, create linkages between programs, and coordinate the care of elders. San Jose State University and DASS are providing leadership in establishing the Northern California Regional Collaborative of ten counties and four universities to transform social work education in the state, and increase geriatric skills of practicing social workers through evidence-based and competency-driven geriatric social work education and training. Thus far, 28 new students have been recruited statewide, 14 of those in the Northern collaborative.

In addition, the California Welfare Directors Association, of which Social Services Agency and the Department of Aging and Adult Services are members, provides state

training to Adult Protective Services and In-Home Supportive Services social workers on an annual basis. DASS provides approximately 500 hours of training per year to public health nurses, social workers, and public guardian staff.

21. Support state/federal funding for geriatric professionals

Status: Done

The CalSWEC Aging Initiative is meeting with the Social Work Leadership Institute of the New York Academy of Medicine and Atlantic Philanthropies to support federal and state funding. The Aging Initiative is comprised of key stakeholders from public and private social service agencies and academic schools of social work, including San Jose State University. The goal of the Aging Initiative is to develop and implement a sustainable statewide plan to increase the workforce for professional social work and advance the quality of care for older Californians and their families.

22. Enhance discharge planning

Status: In Progress

Enhanced discharge planning is an ongoing project addressed by a number of local community based agencies and the County of Santa Clara.

23. Senior Center volunteers training

Status: Done

PRNS Office On Aging developed competency standards and training for senior center volunteers and conducted trainings at all PRNS community and senior centers.

24. Senior services information in “211”

Status: Done

Services and programs offered at senior centers are now included in the “211” information line.

Civil Grand Jury Finding 3:

The Mid-Term and Long-Term Goals are dependent upon the completion of the Immediate Goals and the coordinated allocation of resources.

PRNS Response to Civil Grand Jury Finding 3:

PRNS agrees with this finding.

Civil Grand Jury Finding 4:

Only five of the twenty-four (sic) Immediate Goals have been accomplished by cooperation of the agencies represented by the Leadership Group.

PRNS Response to Civil Grand Jury Finding 4:

Staff wholly disagrees with this finding. As noted in Attachment 1, 16 of the 24 Immediate Goals have been accomplished, an additional five are in progress, and three remain incomplete. The Executive Council and community partners have collaborated extensively and worked diligently to create a coalition that will accomplish all of the Immediate Goals for Santa Clara County seniors as discussed above.

Civil Grand Jury Finding 5:

The City of San Jose, acting independently, accomplished an additional six of the twenty-four (sic) Immediate Goals for the citizens of San Jose.

PRNS Response to Civil Grand Jury Finding 5:

PRNS agrees with this finding.

Civil Grand Jury Recommendations:

The Civil Grand Jury issued the following recommendations, which are detailed below.

- R1:** Establish the Joint Powers Authority (JPA) as specified in the Plan.
- R2:** Establish a time line for the implementation of the Immediate Goals.
- R3:** Concurrent with the establishment of the time line for the Immediate Goals, time lines for Mid-Term and Long-Term Goals should be established.
- R4:** No recommendation
- R5:** No recommendation

Civil Grand Jury Recommendation 1:

Establish the JPA as specified in the Plan.

PRNS Response to Civil Grand Jury Recommendation 1:

The Executive Council, assuming the task of the Leadership Group, determined that a JPA was not feasible in light of the dire budget conditions facing City, County, and nonprofit agencies. The Department of Parks, Recreation, and Neighborhood Services concurs with the Executive Council's determination.

Civil Grand Jury Recommendation 2:

Establish a timeline for the implementation of the Immediate Goals.

PRNS Response to Civil Grand Jury Recommendation 2:

Parks, Recreation, and Neighborhood Services will recommend to the Executive Council and Leadership Group that they establish a timeline to address the five “In Progress” and three “Not Done” Immediate Goals.

Civil Grand Jury Recommendation 3:

Concurrent with the establishment of the timeline for the Immediate Goals, timelines for the Mid-Term and Long-Term Goals should be established.

PRNS Response to Civil Grand Jury Recommendation 3:

PRNS agrees with this finding. The completion of the Immediate Goals and coordination of allocation of resources is well underway. The next steps in the implementation of the Strategic Plan for the Leadership Group include establishing a work plan that includes a timeline for Mid-Term and Long-Term Goals, building an expanded coalition of partners, and creating the Service Coordination and Advocacy Group.

Civil Grand Jury Recommendation 4:

No recommendation.

PRNS Response to Civil Grand Jury Recommendation 4:

No response is needed, as the Civil Grand Jury did not issue a recommendation.

Civil Grand Jury Recommendation 5:

No recommendation.

PRNS Response to Civil Grand Jury Recommendation 5:

No response is needed, as the Civil Grand Jury did not issue a recommendation.

POLICY ALTERNATIVES

The Department of Parks, Recreation, and Neighborhood Services is required to respond to the Civil Grand Jury; therefore, there are no policy alternatives.

PUBLIC OUTREACH/INTEREST

- Criteria 1:** Requires Council action on the use of public funds equal to \$1 million or greater; **(Required: Website Posting)**

- Criteria 2:** Adoption of a new or revised policy that may have implications for public health, safety, quality of life, or financial/economic vitality of the City. **(Required: E-mail and Website Posting)**

- Criteria 3:** Consideration of proposed changes to service delivery, programs, staffing that may have impacts to community services and have been identified by staff, Council or a Community group that requires special outreach. **(Required: E-mail, Website Posting, Community Meetings, Notice in appropriate newspapers)**

This item does not meet any of the Public Outreach/Interest Criteria. This memorandum will be posted on the City's website for the June 16, 2007 Council Agenda.

The Civil Grand Jury conducted interviews with management representatives of the Santa Clara County Department of Aging and Adult Services on August 30, 2006; PRNS management on September 21, 2006; County Board of Supervisor members on October 4, 2006; San Jose City Council Members on October 25, 2006; and City Office On Aging staff on October 27, 2006. The Civil Grand Jury report was released to the public on April 23, 2007.

COORDINATION

This memorandum was coordinated with the Offices of the City Manager and City Attorney.

CEQA

Not a project


ALBERT BALAGSO
Director of Parks, Recreation and
Neighborhood Services

Attachment

Please contact ANGEL RIOS, DEPUTY DIRECTOR, at 408-535-3576.

Ten Year Strategic Plan for Older Adults Status of Immediate Goals

	CATEGORY	SERVICE STRATEGY	STATUS	CITY RESPONSE
1	Leadership	Convene team of partner organizations	Done	Done
2	Leadership	Establish permanent leadership group	Not Done	Done
3	Leadership	Unified funding applications & joint administration	Not Done	Not Done
4	Leadership	Assess creation of a Joint Powers Authority	Not Done	Done
5	Leadership	Form service coordination and advocacy group	Not Done	In Progress
6	Housing	Institute senior home repair consortium	Not Done	In Progress
7	Information	Support "211" telephone hotline for resources for older adults	Done	Done
8	Information	Disseminate information on resources	San José is doing	Done
9	Information	Increase distribution of services directory	San José is doing	Done
10	Information	Networkofcare.org and website offerings	Done	Done
11	Information	Web page in each city and county website	Not Done	Done
12	Language	Non-English speaking information campaign	San José is doing	Done
13	Transportation	Subsidized taxi service	Not Done	Not Done
14	Transportation	Broaden VTA Paratransit eligibility	some changes by VTA	In Progress
15	Transportation	"Bus Buddy" program	Not Done	Not Done
16	Transportation	Transportation to/between Senior Centers	San José added 4 vans for use of the Senior Centers	Done
17	In-Home Care	Review care management program	No service and advocacy group	Done
18	Caregiver Support	Equip Senior Centers as caregiver information referral centers	San José is doing	Done
19	Caregiver Support	Include caregiver support information in "211" services	Done	Done
20	Healthcare	Attract more healthcare professionals to geriatrics	Not Done	In Progress
21	Healthcare	Support state/federal funding for geriatric professionals	Not Done	Done
22	Healthcare	Enhance discharge planning	Not Done	In Progress
23	Senior Centers	Senior Center volunteers training	San José is doing	Done
24	Senior Centers	Senior Services information in "211"	Done	Done



April 17, 2007

COPY

RECEIVED
CITY CLERK
2007 APR 23 A 11:08

Honorable Chuck Reed
Mayor
City of San Jose
200 East Santa Clara Street
San Jose, CA 95113

Dear Mayor Reed and Members of the City Council:

Pursuant to Penal Code § 933.05(f), the 2006-2007 Santa Clara County Civil Grand Jury is transmitting to you its Final Report, **The Ten-Year Plan to Advance the Well-Being of Senior Citizens Falls Short of Its Goal.**

Penal Code § 933.05(f)

A grand jury shall provide to the affected agency a copy of the portion of the grand jury report relating to that person or entity **two working days** prior to its public release and after the approval of the presiding judge. No officer, agency, department or governing body of a public agency shall disclose any contents of the report prior to the public release of the final report. **Leg. H.** 1996 ch. 1170, 1997 ch. 443.

This report will be made public and released to the media on **Monday, April 23, 2007 at noon.** If you have any questions please contact Gloria Alicia Chacón, Executive Assistant, at 408-882-2721.

Sincerely,

A handwritten signature in black ink, appearing to read 'Ronald R. Layman', written over a horizontal line.

RONALD R. LAYMAN
Foreperson
2006-2007 Civil Grand Jury

RRL:dsa
Enclosure

cc: Les White, Interim City Manager
Albert Balagso, Director, PRNS, City of San Jose



2006-2007 SANTA CLARA COUNTY CIVIL GRAND JURY REPORT

THE TEN-YEAR PLAN TO ADVANCE THE WELL-BEING OF SENIOR CITIZENS FALLS SHORT OF ITS GOAL

Summary

The ten-year strategic plan to advance the well-being of Santa Clara County's older adults, titled "*Community For A Lifetime: A Ten-Year Strategic Plan To Advance The Well-Being Of Santa Clara County's Older Adults*" (Plan), was released in December 2004. The City of San Jose (City) and the County of Santa Clara (County) jointly sponsored it. The Plan was to be implemented in three stages.

The 2006-2007 Santa Clara County Civil Grand Jury (Grand Jury) investigating the status of the various recommendations of the Plan discovered that the Plan has failed to proceed to completion of even the first phase. Only five of the twenty-four goals in the Immediate Goals section of the Plan that were to have been implemented by agency cooperation have been accomplished. Six of the other twenty-four goals have been fully or partially implemented by the City for its own citizens independently of the joint venture. The failure to accomplish the majority of the goals is due to a lack of leadership and a lack of cooperation between the various agencies charged by the Plan to serve the needs of Santa Clara County's senior citizens.

The Grand Jury recommends that, due to the lack of the effective leadership, a Joint Powers Authority (JPA) be established immediately to implement the objectives of the Plan. The Grand Jury further recommends that one of the first tasks of the JPA should be to establish a time line for the implementation of the Immediate, Mid-Term, and Long-Term Goals of the Plan.

Background

By 2020, the population of seniors in Santa Clara County is expected to almost double from approximately 220,000 to a projected 428,000. This will represent about 21% of the County's population. By 2040, this demographic is predicted to reach approximately 600,000 people. This growth, driven by aging "baby boomers," will greatly impact the demand for senior services.

Based upon a 1994 ten-year plan that addressed the needs of the County's senior population, "*Planning The Age Wave*," the San Jose City Council (Council) passed, in June of 2001, a resolution to perform a new survey. The Santa Clara County Board of Supervisors (BOS) asked to join in partnership with the City in order to produce a broader-based countywide plan.

The Sacramento-based consulting firm of MGT of America was retained to prepare and implement the survey and prepare the Plan. The planning process consisted of two key elements: identifying the needs of seniors, and establishing ways to assist them. More than 1,100 community members, comprised of seniors, advocates, elected officials, service providers, and academics, participated in the development of the Plan. The result was "*Community For A Lifetime: A Ten-Year Strategic Plan To Advance The Well-Being Of Santa Clara County's Older Adults*," dated December 2004. It was endorsed in a memorandum from the BOS on January 5, 2005, and by the Mayor of San Jose in a February 1, 2005 letter to the community. At the same time, a letter announcing the Plan was sent to all involved parties.

The Plan contains a section on Strategy Implementation segmented into three phases: Immediate, Mid-Term, and Long-Term Goals. The Immediate Goals could be implemented without requiring significant resources. These goals would establish governance and reduce service barriers. The Mid-Term Goals depend on the completion of the Immediate Goals. The Long-Term Goals require significant resource allocation, infrastructure changes, and multiple levels of review and approval.

The Plan covered ten specific areas of senior citizen needs:

- Leadership and Coordination
- Housing
- Information
- Language
- Transportation
- In-Home Care
- Caregiver Support
- Health Care
- Senior Centers
- Funding

A key strategy in the Plan was to "develop and convene a team of public and private organizations to insure that steps are taken to present (to the Council and the BOS) the strategic plan and jumpstart its implementation." A Leadership Group was formed, consisting of County employees, members of the BOS, members of the San Jose City Council, representatives from every municipality in Santa Clara County, representatives from nonprofit organizations, and members of special districts and oversight groups. (See Appendix).

In August 2006, seventeen months after the Plan's release, the Grand Jury focused on what had been accomplished so far. Subsequently, the Grand Jury interviewed the County Department of Aging and Adult Services, the City's Office on

Aging, and the Department of Parks, Recreation, and Neighborhood Services, as well as members of the Council and BOS. These included the County and City Co-chairs of the Leadership Group.

Discussion

Only five of the Plan's twenty-four Immediate Goals that were to have been implemented by agency cooperation have actually been accomplished. The City of San Jose, acting independently of the Leadership Group, has accomplished six of the Immediate Goals for its own citizens. This represents a serious lack of progress on the part of the agencies charged with putting the Plan into action. Currently there appears to be little prospect of improving progress without significant change.

One of the needs identified by the survey was "...*coordinated* leadership and advocacy for aging services." (Emphasis added.) To satisfy this need, the Plan contained the objective to "create a formalized leadership structure that improves the coordination, prioritization, and funding of aging services." This structure is known as the Leadership Group. This group has failed to function.

The value of cooperation between agencies has not been realized. The Leadership Group, responsible for coordinating and implementing the Plan, has met only once since December 2004. When it did meet, little was accomplished. As reported to the Grand Jury, there was a lack of leadership, a lack of cooperation, and a dynamic of territoriality within the Leadership Group as evidenced by the number of unaccomplished goals. It is notable that the Plan was predicated on the expectations that *all* agencies, in cooperation, would help to accomplish these goals and thus spread out the administrative and financial burden. Instead, the City of San Jose realized that if it did not implement those strategies that it could, nothing would happen. The City has therefore chosen to go it alone and accomplish some parts of the Plan for the City's seniors. The solution to the vacuum created by the nonfunctioning Leadership Group is contained in the Plan.

One of the strategies in the Immediate Goals is given as follows:

The Leadership Group will assess the feasibility of the creation of a Joint Powers Authority for ongoing funding and coordination of aging programs and services. Purposes of the JPA would be to utilize coordinated funding decisions to support and enhance coordination, to eliminate duplication of aging services, to alleviate fragmentation, and to identify ways to fill gaps in services.

California Government Code Sections 6500-6536 authorize the creation of a governmental body known as a JPA. A JPA is a governmental organization consisting of multiple public entities that have joined together to collectively accomplish a goal. A JPA may have specific powers designated to it that duplicate any of the powers of the participating agencies. Since the Leadership Group has failed even to "assess the feasibility of the creation of a JPA," the Grand Jury is recommending that a JPA be created to assure the implementation of the strategies if the plan is continued.

Ten-Year Strategic Plan for Older Adults
Status of Immediate Goals

Category	Service strategy	Status
Leadership	Convene team of partner organizations	Done
Leadership	Establish permanent leadership group	Not done
Leadership	Unified funding applications & joint administration	Not done
Leadership	Assess creation of a Joint Powers Authority	Not done
Leadership	Form service coordination and advocacy group	Not done
Housing	Institute senior home repair consortium	Not done
Information	Support "211" – A telephone hotline for resources for older adults	Done
Information	Disseminate information on resources	San Jose is doing
Information	Increase distribution of services directory	San Jose is doing
Information	Networkofcare.org and website offerings	Done
Information	Web page in each city and county web site	Not done
Language	Non-English speaking information campaign	San Jose is doing
Transportation	Subsidized taxi service	Not done
Transportation	Broaden VTA Paratransit eligibility	Some changes by VTA
Transportation	"Bus Buddy" Program	Not done
Transportation	Transportation to/between Senior Centers	San Jose added 4 vans for the use of Senior Centers
In-Home Care	Review care management programs	No service and advocacy group
Caregiver Support	Equip Senior Centers as caregiver information referral centers	San Jose is doing
Caregiver Support	Include caregiver support information in "211" services	Done
Healthcare	Attract more healthcare professionals to geriatrics	Not done
Healthcare	Support State/Federal funding for geriatric professionals	Not done
Healthcare	Enhance discharge planning	Not done
Senior Centers	Senior Center volunteers training	San Jose is doing
Senior Centers	Senior Services information in "211"	Done

There has been some indication of renewed effort by both the City and the County. At the annual San Jose Wellness Faire (Faire) on October 4, 2006, a Council Member and a County Supervisor reaffirmed their commitment to the Plan.

Conclusions

A potentially effective plan, based upon a valid needs assessment of the older adults of Santa Clara County, has not been implemented. The failure is due primarily to a lack of cooperation between the public and private nonprofit agencies that comprise the Leadership Group. The Leadership Group is ineffective and has resulted in a denial of services to older adults.

The Plan calls for the Leadership Group to assess the feasibility of creating a JPA for ongoing funding and coordination of programs and services. In the absence of a functioning, effective, and cooperative Leadership Group, it is critical that the cities of Santa Clara County, along with the County, create a JPA to accomplish the goals of the Plan.

While hopes were raised when the County and City recommitted to the Plan at the Faire, the actual marshaling of public, private, and nonprofit agencies, along with resource allocation, has not happened in the four months since.

Findings

The following findings were reviewed by the subject agencies.

- F1: The Plan has stalled because of a lack of cooperation between the various agencies comprising the Leadership Group.
- F2: No time line exists for the implementation of the Immediate Goals.
- F3: The Mid-Term and Long-Term Goals are dependent upon the completion of the Immediate Goals and the coordinated allocation of resources.
- F4: Only five of the twenty-four Immediate Goals have been accomplished by cooperation of the agencies represented by the Leadership Group.
- F5: The City of San Jose, acting independently, accomplished an additional six of the twenty-four Immediate Goals for the citizens of San Jose.

Recommendations

The Grand Jury recommends that the BOS and the San Jose City Council take the following actions:

R1: Establish the JPA as specified in the Plan.

R2: Establish a time line for the implementation of the Immediate Goals.

R3: Concurrent with the establishment of the time line for the Immediate Goals, time lines for the Mid-Term and Long-Term Goals should be established.

R4: No recommendation

R5: No recommendation

Appendix

Leadership Group Membership

American Association of Retired People
Catholic Charities of Santa Clara County
City of Gilroy
City of Los Altos
City of Milpitas
City of Morgan Hill
City of Mountain View
City of Palo Alto
City of San Jose
City of San Jose Office of Mayor
City of San Jose Office on Aging
City of Santa Clara
City of Saratoga
City of Sunnyvale
Congress of California Seniors
Council on Aging, Silicon Valley
Former City of San Jose Councilmember Ken Yeager
Former City of San Jose Councilmember Linda LeZotte
Former Santa Clara County Supervisor James Beall
Housing Authority of the County of Santa Clara
Housing Trust of Santa Clara County
John Vasconcellos Legacy Project
Metropolitan Transportation Commission
National Council on Aging
Office of Santa Clara County Supervisor Don Gage
Outreach and Escort, Inc.
Sacred Heart Community Service
Santa Clara County Department of Aging and Adult Services
Santa Clara County Executive
Santa Clara County Public Guardian
Santa Clara County Senior Care Commission
Santa Clara County Supervisor Pete McHugh
Santa Clara County Valley Health

Appendix – continued

Leadership Group Membership

Santa Clara Valley Transportation Authority
State of California Senior Legislature - Senator Robert Jaffee
The Health Trust
Town of Los Gatos
United Way of Silicon Valley

Bibliography

California Government Code, §§6500 – 6536.

MGT of America. 2004. *Community For A Lifetime: A Ten-Year Strategic Plan To Advance The Well-Being Of Santa Clara County's Older Adults*. December 2004.

Minutes of the Leadership Group, June 22, 2005.

Visitations and Interviews

August 30, 2006	Official, Santa Clara County Older Adults Program.
September 21, 2006	Official, San Jose City Parks, Recreation, and Neighborhood Services Department.
October 4, 2006	Member, County BOS.
October 25, 2006	Member, San Jose City Council.
October 27, 2006	Staff member, San Jose City Office on Aging.

Acronyms and Definitions

BOS Santa Clara County Board of Supervisors

City City of San Jose

Council San Jose City Council

County County of Santa Clara

Faire San Jose Wellness Faire

JPA Joint Powers Authority

Plan *"Community For A Lifetime: A Ten-Year Strategic Plan To Advance The Well-Being Of Santa Clara County's Older Adults"*

PASSED and **ADOPTED** by the Santa Clara County Civil Grand Jury on this 27th day of February 2007.

Ronald R. Layman
Foreperson

David M. Burnham
Foreperson Pro tem

Kathryn C. Philp
Secretary