



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