



**AMENDMENT NUMBER FIVE
 TO
 CONTRACT NO. MA-012-24011305
 BETWEEN
 COUNTY OF ORANGE
 AND
 COUNCIL ON AGING-SOUTHERN CALIFORNIA, INC.
 FOR
 OMBUDSMAN AND ELDER ABUSE PREVENTION PROGRAM**

This Amendment to Contract Number MA-012-24011305, (hereinafter referred to as “Amendment”) is made and entered into upon execution of all necessary signatures, and made and entered into between the County of Orange, a political subdivision of the State of California, hereinafter referred to as “County” and Council on Aging-Southern California, Inc., DUNS No. 053284159, UEI No. LL8TLAJBVEF8, a non-profit corporation in the State of California, with a place of business at 2 Executive Circle, Ste. 175, Irvine, CA 92614, (hereinafter referred to as “Subrecipient”), with County and Subrecipient sometimes referred to as “Party,” or collectively as “Parties.”

RECITALS

WHEREAS, County and Council on Aging-Southern California, Inc. entered into Contract Number MA-012-24011305 (hereinafter referred to as “Original Contract”), for Ombudsman and Elder Abuse Prevention Program, commencing July 1, 2024, through June 30, 2025, for a total amount not to exceed \$1,327,386; and

WHEREAS, the Parties entered into Amendment Number One to increase the Contract amount of \$600,514, resulting in a new maximum amount of \$1,927,900, replacement of General Terms and Conditions – Paragraph BB. Contingency of Funds; replacement of Attachment A – Scope of Services; replacement of Attachment B – Payment Compensation; replacement of Attachment C – Budget Schedule; replace Attachment D – Staffing Plan; replacement of Attachment E – Performance Standards; replacement of Attachment F – Federal Award Identification; and

WHEREAS, the Parties entered into Amendment Number Two to renew the service term for an additional one-year period, in the annual amount of \$1,927,900, effective from July 1, 2025, through June 30, 2026; and to replace Attachment B-1 – Payment Compensation, replace Attachment C-1 – Budget Schedule, replace Attachment D-1 – Staffing Plan, replace Attachment E-1 – Performance Standards, and replace Attachment F-1 – Federal Award Identification; and

WHEREAS, the Parties entered into Amendment Number Three to decrease the Contract amount by \$358,786, resulting in a new annual maximum amount of \$1,569,114, replace of Attachment A-1 – Scope of Services; replace Attachment B-3 – Payment Compensation; replace Attachment C-2 – Budget Schedule; replace Attachment D-2 – Staffing Plan; replace Attachment E-2 – Performance Standards; replace Attachment F-2 – Federal Award Identification;

WHEREAS, the Parties entered into Amendment Number Four to increase the Contract amount by \$224,742, resulting in a new annual maximum amount of \$1,793,856, replace Attachment B-4 – Payment Compensation; replace Attachment C-3 – Budget Schedule; and replace Attachment D-3 – Staffing Plan;

WHEREAS, the Parties now desire to execute Amendment Number Five to renew the service term for an additional one-year period, in the annual amount of \$1,592,041, effective from July 1, 2026, through June 30, 2027; replace Attachment B-5 – Payment Compensation; replace Attachment C-4 – Budget Schedule; replace Attachment D-4 – Staffing Plan, and replace Attachment E-3 and replace Attachment F-3;

NOW, THEREFORE, in consideration of the mutual obligations set forth herein, both Parties mutually agree to amend as follows:

1. The Contract amount is hereby renewed for the amount \$1,592,041 for the term effective from July 1, 2026, through June 30, 2027, bringing the new cumulative contract total not to exceed \$5,313,797.
2. Attachment B-5 – Payment and Compensation, is hereby replaced with Attachment B-6.
3. Attachment C-4 – Budget Schedule, is hereby replaced with Attachment C-5.
4. Attachment D-4 – Staffing Plan, is hereby replaced with Attachment D-5.
5. Attachment E-3 – Performance Standards, is hereby replaced with Attachment E-4.
6. Attachment F-3 – Federal Award Identification, is hereby replaced with Attachment F-4.
7. Exhibit 5(a) – OCCR Contract Reimbursement Policy is hereby removed from the Contract.

Except as otherwise expressly set forth herein, all terms and conditions contained in the original Contract, including any amendments/modifications, are hereby incorporated herein by this reference as if fully set forth herein and shall remain in full force and effect.

-Signature Page follows-

SIGNATURE PAGE

IN WITNESS WHEREOF, the Parties hereto have executed this Amendment on the dates with their respective signatures:

***COUNCIL ON AGING-SOUTHERN CALIFORNIA, INC.**

By: DocuSigned by:
Lisa Wright Jenkins
44EBE8227F53436... _____ By: _____

Name: Lisa Wright Jenkins _____ Name: _____

Title: President & CEO _____ Title: _____

Dated: 4/21/2026 _____ Dated: _____

*For Subrecipients that are corporations, signature requirements are as follows: 1) One signature by the Chairman of the Board, the President or any Vice President; and 2) One signature by the Secretary, any Assistant Secretary, the Chief Financial Officer or an Assistant Treasurer.

*For Subrecipients that are not corporations, the person who has authority to bind the Subrecipient to a Contract, must sign on one of the lines above.

COUNTY OF ORANGE

A Political Subdivision of the State of California

By: _____ Dated: _____
Deputy Purchasing Agent

APPROVED AS TO FORM

Office of the County Counsel

Signed by: John Cleveland _____ 4/21/2026
74900932EE65457... _____ Dated: _____
DEPUTY

ATTACHMENT B-6
PAYMENT AND COMPENSATION

I. COMPENSATION:

This is a cost reimbursement Contract between the County and the Subrecipient for up to \$1,592,041 beginning July 1, 2026, through June 30, 2027. The Subrecipient agrees to accept the specified compensation as set forth in this Contract as full remuneration for performing all services and furnishing all staffing and materials required, for any reasonably unforeseen difficulties which may arise or be encountered in the execution of the services until acceptance, for risks connected with the services, and for performance by the Subrecipient of all its duties and obligations hereunder. The County shall have no obligation to pay any sum in excess of the total Contract amount specified unless authorized by an amendment in accordance with Paragraphs C and P of the County's General Terms and Conditions.

II. BUDGET TERMS

- A. Detailed Budget: Upon approval by the Orange County Board of Supervisors and/or the County – but prior to submission of invoices, a detailed budget must be submitted to the Office on Aging office for approval. Budget templates will be provided by the Office on Aging through the assigned *Box Folder*. Invoices shall be submitted based upon these detailed budgets.
- B. Budget revisions are changes made to the budget line items on Attachment C.
1. Budget revisions initiated by Subrecipient must be limited to no more than two (2) times per program, per Fiscal Year.
 2. Budget revision requests initiated by Subrecipient must be submitted no later than 60 days before the end of the contract term.
- C. Budget modifications are changes made to the detailed budget
1. Budget modifications initiated by Subrecipient must be limited to no more than three (3) times per program, per Fiscal Year.
 2. Budget modification requests are approved based on County discretion.
- D. Subrecipient must include a justification narrative specifying the purpose of the revision or modification.
- E. All additional budget revision and budget modification requests initiated by Subrecipient may be denied. Special consideration may be given for extenuating circumstances, but approval is not guaranteed.

III. PAYMENT TERMS

Invoices are to be submitted in arrears to the user agency/department. An invoice for the reimbursement of costs shall be submitted as specified below upon the completion of the services/activities and approval of the County. Payment shall be made within thirty (30) days after receipt of a properly prepared invoice in a format acceptable to the County. All invoices shall be verified and approved by County prior to payment and processed in accordance with the County's routine procedures. The responsibility for providing an acceptable invoice rest with the Subrecipient.

Billing shall cover services not previously invoiced. The Subrecipient shall reimburse the County of Orange for any monies paid to the Subrecipient for services not provided or when services do not meet the Contract requirements.

IV. INVOICING INSTRUCTIONS

- A. Subrecipient shall submit an invoice(s) and other substantiating reports as County may require, all in a form satisfactory to County, by the fifteenth (15th) day of each month. If the 15th falls on a weekend or holiday, the invoice/data report is due on the next business day. If Subrecipient receives funds pursuant to this Contract for more than one program or Service Area, each such program or Service Area shall be invoiced separately from all other programs or Service Areas, and separate substantiating reports shall be submitted for each program or Service Area, unless otherwise approved by County. County shall make monthly payments based on Subrecipient's data, invoice(s), and substantiating reports, unless otherwise approved by County.
- B. In cases where errors or Disallowed costs are identified by County, County will return invoice(s) for revision. Subrecipient must resubmit revised invoice(s) within five (5) business days of notification from County, excluding the 11th month invoice and 12th month close-out invoice.
- C. No payments will be made if any preceding months' invoices are outstanding, unless otherwise approved by the County.
- D. No payments will be made for costs incurred by Subrecipient which are determined to be unallowable, in accordance with the applicable Federal statutes, regulations, or the terms and conditions of the Federal award. (2 CFR Part 200.31 and 45 CFR 75.2)
- E. Whenever Subrecipient is not in compliance with any provision of this Contract, County may withhold payment until such time as Subrecipient comes into compliance.
- F. Any late submission for the 1st through 10th invoices will result in technical assistance finding during program monitoring.

Further instructions regarding invoicing/reimbursements as set forth in Exhibit 5, OC Community Resources Contract Reimbursement Policy, are attached hereto and incorporated herein by reference.

V. CLOSE-OUTS

- A. The 11th month invoice is due on the 10th of the 12th month of the contract without exception. In cases of returned invoices due to errors or disallowed costs, Subrecipient must resubmit revised invoice(s) within two (2) business days of notification from County.
- B. The 12th month close-out invoice is due on the 10th of month following the end of the contract term, without exception. In cases of returned invoices due to errors or disallowed costs, Subrecipient must resubmit revised invoice(s) within two (2) business days of notification from County.
- C. Request for invoice revisions from the Subrecipient will only be allowed at the County's discretion.
- D. Subrecipient must submit the 12th month invoice estimates by the 10th of the 12th month of the contract. Estimates must be projected based on anticipated actual expenditure.
- E. Any late submission for the 11th and 12th month invoices will result in a corrective monitoring finding, without any exceptions. All requests for late submissions or due date extensions will not be granted. A Corrective Action Plan (CAP) will be required to address this finding.

VI. FULL COMPENSATION

The Subrecipient agrees that the payment listed in this contract is the full amount they will receive. This payment covers all work, staff, and materials needed to complete the services, including any unexpected issues or difficulties that may arise. The Subrecipient accepts all risks related to the work and agrees to fulfill all responsibilities under this contract for that amount.

ATTACHMENT C-5
BUDGET SCHEDULE

Council on Aging Southern California, Inc.
Ombudsman & Elder Abuse Prevention
(July 1, 2026 - June 30, 2027)

Service Area(s)
Countywide

I. Subrecipient's Budget

The following Budgets are set forth for informational purposes only, and may be adjusted by mutual agreement, in writing, of Subrecipient and County.

Elder Abuse Prevention

Program Costs	\$92,186
Administrative Costs	\$0
AMOUNT NOT TO EXCEED	\$92,186
Total Program Match (Cash and/or In-Kind)	Not Applicable

Ombudsman III-B

Program Costs	\$839,768
Administrative Costs	\$0
AMOUNT NOT TO EXCEED	\$839,768
Total Program Match (Cash and/or In-Kind)	\$9,545

Ombudsman VII-A

Program Costs	\$149,818
Administrative Costs	\$0
AMOUNT NOT TO EXCEED	\$149,818
Total Program Match (Cash and/or In-Kind)	Not Applicable

Ombudsman Special Initiative

Program Costs	\$510,269
Administrative Costs	\$0
AMOUNT NOT TO EXCEED	\$510,269
Total Program Match (Cash and/or In-Kind)	Not Applicable

Upon approval by the Orange County Board of Supervisors and/or the County – but prior to submission of July 2026 invoices, a detailed budget must be submitted to the County office for approval. Budget templates will be provided by the County. Invoices shall be submitted based upon these detailed budgets.

Subrecipient may request to shift funds between programs, or between budgeted line items within a program, for the purpose of meeting specific program needs by utilizing the applicable form provided by County. Subrecipient must include a justification narrative specifying the purpose of the request, the amount of said funds to be shifted, and the sustaining annual impact of the shift as may be applicable to the current Fiscal Year Budget and/or future Fiscal Year Budgets. Subrecipient shall obtain written approval of any budget adjustments from County prior to implementation by Subrecipient.

II. The above Budget Display is an overview of the actual budget approved by the County. Subrecipient shall be responsible for and maintain the approved *Detailed Budget* that is provided to Subrecipient from County. The Detailed Budget shall be maintained and completed in accordance with the County policies and processes. Any deviation from the County approved budget, may and can delay acceptance of budgets and/or reimbursements.

III. The Detailed Budget must set forth in detail the reimbursable items, unit rates, and extended total amounts for each line item. The Subrecipient’s Detailed Budget shall include, at a minimum, the following items when reimbursable and applicable under this Contract:

A. Personnel Costs – annual Full-Time Effort (FTE) wage rates and personnel classifications together with the percentage of time to be charged, specified for each program. 2 CFR 200.430 must be followed for rules regarding allowability of personnel costs. Specific emphasis of section (i) of 2 CFR 200.430:

1. Charges to Federal awards for salaries and wages must be based on records that accurately reflect the work performed. These records must:
 - i. Be supported by a system of internal control which provides reasonable assurance that the charges are accurate, allowable, and properly allocated.
 - ii. Be incorporated into the official records of the non-Federal entity.
 - iii. Reasonably reflects the total activity for which the employee is compensated by the non-Federal entity, not exceeding 100% of compensated activities.
 - iv. Support the distribution of the employee’s salary among specific activities or cost objectives if the employee works on more than one Federal award; a Federal award and a non-Federal award, an indirect cost activity and a direct cost activity; two or more indirect activities which are allocated using different allocation bases; or an unallowable activity and a direct or indirect cost activity.
 - v. Budget estimates (i.e., estimates determined before the services are performed) alone do not qualify as support for changes to Federal awards.
2. Salaries and wages of employees used in meeting cost sharing or matching requirements on Federal awards must be supported in the same manner as salaries and wages claimed for reimbursement from Federal awards.

B. Fringe Benefits – specified for each program.

- C. Staff Travel (In-State and Out-of-State travel) – mileage reimbursement, lodging, per diem, and other travel costs, specified for each program.
- D. Staff Training – attendance cost for necessary training, specified for each program.
- E. Rent – total, specified for each program.
- F. Property/Equipment - detailed descriptions and unit costs, specified for each program.
- G. Supplies – to include items that do not qualify as property, specified for each program.
- H. Contractual Costs (Consultants/Professional Services) – cost detail, specified for each program.
- I. Food – used in delivering Congregate and Home-Delivered Meals.
- J. Other – Facilities, operating expenses, and other ordinary and necessary costs specified for each program.
- K. Allocated Direct Costs – requires submission of a Direct Cost Allocation Plan for prior approval.
- L. Indirect Costs – costs incurred for a common or joint purpose benefitting more than one cost objective and not readily assignable as a direct cost.

IV. One-Time Only (OTO) Funds

- A. OTO funds are non-transferable between funding sources. This means that OTO funds can only be used in the program in which they were accrued.
- B. Titles III federal Program OTO funds shall only be used for the following purposes:
 - 1. The purchase of equipment that enhances the delivery of services to the eligible service population.
 - 2. Home and community-based projects that are approved in advance by County and CDA and are designed to address the unmet needs of the eligible service population identified in the Area Plan.
 - 3. Innovative pilot projects that are approved in advance by County and CDA, and are designed for the development or enhancement of a comprehensive and coordinated system of services as defined in 45 CFR 1321.53(a)(b).
 - 4. OTO funds can be used to maintain or increase baseline services. However, Subrecipient shall assure that services funded with OTO funds will not create an expectation of service delivery beyond the current Contract period. Expenditures for baseline services do not require advance County and/or CDA approval.
- C. NSIP OTO funds shall only be used to purchase food used in the Elderly Nutrition Program.

V. Matching Contributions

“Matching Contributions” means local cash and/or in-kind contributions made by the Subrecipient, subcontractor, or other local resources that qualify as match for the Contract funding.

- A. Cash and/or in-kind contributions may count as match, if such contributions are used to meet program requirements.
- B. Any matching contributions (cash or in-kind) must be verifiable from the records of the Subrecipient and the subcontractor.
- C. Matching contributions must be used for allowable costs in accordance with the OMB cost principles.
- D. Match requirement must be fulfilled by the end of the contract fiscal year.
- E. The required minimum program matching contributions for Title IIIB, not including Ombudsman, is ten percent (calculation factor of 10.53%).
- F. Minimum matching requirements are calculated on net costs, which are total costs less program income, non-matching contributions, and State funds. Matching contributions are included in the detailed budget minimum matching requirements calculation.
- G. Matching contributions generated in excess of the minimum required are considered overmatch.

VI. Indirect Costs

- A. The maximum reimbursement amount allowable for indirect costs is fifteen percent (15%) of the Subrecipient's Modified Total Direct Costs (MTDC), per funding category excluding in-kind contributions and nonexpendable equipment.

Modified Total Direct Cost (MTDC) means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$50,000 of each subaward (regardless of the period of performance of the subawards under the awards). MTDC excludes in-kind contributions, equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs, and the portion of each subaward in excess of \$50,000. Other items may only be excluded when necessary to avoid serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs. [45 CFR 75.2]

- B. Subrecipients requesting reimbursement for indirect costs exceeding the maximum fifteen percent (15%) shall retain on file an approved negotiated indirect cost rate or cost allocation plan.
- C. Indirect costs exceeding the fifteen percent (15%) maximum may be budgeted as in-kind for purposes of meeting matching requirements in Title III and VII programs only. Subrecipients must receive prior approval from federal awarding agency prior to budgeting the excess indirect costs as in-kind.

VII. Program Income

- A. Program Income means revenue generated by the Subrecipient and/or its Subcontractor from contract-supported activities and may include.
- i. Voluntary contributions received from a participant or responsible party as a result of the service(s).
 - ii. Income from usage or rental fees of real or personal property acquired with funds provided under this Contract.
 - iii. Royalties received on patents and copyrights from contract-supported activities.
 - iv. Proceeds from the sale of items fabricated under a contract agreement.
- B. Subrecipient shall provide every participant the opportunity to voluntarily contribute toward the cost of the services provided under this Contract for the applicable programs. Subrecipient shall protect the privacy of each such contributor with respect to his or her contribution and shall not maintain individual records of contributions. No participant shall be denied a service because of unwillingness or inability to contribute towards the cost of said service.
- C. Subrecipient shall keep separate accounts of all contributions for services provided pursuant to this Contract. Subrecipient shall report on such contributions monthly to County in the format required by County.
- D. Contributions for services provided pursuant to this Contract shall be added to the funds provided to Subrecipient by County pursuant to this Contract and shall be used for the purposes and in accordance with the terms of this Contract.
- E. Program Income must be reported and expended under the same terms and conditions as the program funds from which it is generated.
- F. Program Income must be used to pay for current allowable costs of the program in the same fiscal year that the income was earned.
- G. For Title III B, III-C, III-D, III E, VII Ombudsman, and VII-A Elder Abuse Prevention programs, Program Income must be spent before contract funds and may reduce the total amount of contract funds payable to the Subrecipient.

- H. Program Income may not be used to meet the matching requirements of this Contract.
- I. Program Income must be used to expand baseline services.
- J. No fees may be charged for services, although voluntary contributions may be requested.

VIII. Allocation Transfers

- A. Subrecipient shall submit a request to County to transfer federal or State funds between Title III B, C1, and C2 programs in accordance with the most current funding allocation.
 - i. Transfer of federal baseline funds is allowable between Titles III B and III-C in accordance with OAA § 308(b)(5)(A) and between Titles III C1 and III C2 in accordance with OAA § 308(b)(4)(A).
 - ii. Transfer of State funds is allowable between Title III C1 General Fund and Title III C2 General Fund.
 - iii. The Title III-C nutrition augmentation funding may be transferred between Title III General Fund C1 and Title III General Fund C2 as needed to provide services. The funding must not be transferred to other programs or be used to supplant other program funding, including the Federal Title III C1 and Federal Title III C2.
- B. Allocation transfers are due to County as determined by County/State.
- C. Approved transfers will be incorporated within the Subrecipient's Detail Budget.

**ATTACHMENT D-5
STAFFING PLAN**

Council on Aging-Southern California, Inc.
July 1, 2026 – June 30, 2027

I. Elder Abuse Prevention

Title
Accounting Managers
Accounting Specialists
Chief Executive Officer
Chief Financial Officer
Chief Operating Officer
Finance Managers
Human Resources and Operations Manager
Marketing Manager
Office Coordinator
Program Administrator
Program Director
Receptionist

II. Ombudsman III-B

Title
Accounting Managers
Accounting Specialists
Chief Executive Officer
Chief Financial Officer
Chief Operating Officer
Data Entry Coordinator
Field Ombudsman (Part-Time)
Field Services Managers
Finance Managers
Human Resources and Operations Manager
Marketing Manager
Office Coordinator
Ombudsman Intake Coordinator
On Call Intake Coordinator
Program Director
Receptionist
Regional Coordinator
Resident Advocates
Volunteer & Retention Manager

III. Ombudsman VII-A

Title
Accounting Managers
Accounting Specialists
Chief Executive Officer
Chief Financial Officer

Chief Operating Officer
Data Entry Coordinator
Field Ombudsman (Part-Time)
Field Services Managers
Finance Managers
Human Resources and Operations Manager
Marketing Manager
Office Coordinator
Ombudsman Intake Coordinator
On Call Intake Coordinator
Program Director
Receptionist
Regional Coordinator
Resident Advocates
Volunteer & Retention Manager

IV. Ombudsman Special Initiative

Title
Accounting Managers
Accounting Specialists
Chief Executive Officer
Chief Financial Officer
Chief Operating Officer
Data Entry Coordinator
Field Ombudsman (Part-Time)
Field Services Managers
Finance Managers
Human Resources and Operations Manager
Marketing Manager
Office Coordinator
Ombudsman Intake Coordinator
On Call Intake Coordinator
Program Director
Receptionist
Regional Coordinator
Resident Advocates 1
Volunteer & Retention Manager

The substitution or addition of other key individuals in any given category or classification shall be allowed only with prior written pre-approval of the County.

The County may reserve the right to involve other personnel, as their services are required. The specific individuals will be assigned based on the need and time of the service/class required. Assignment of additional key personnel shall be subject to County approval pursuant to Paragraph 13 of the Contract.

**PERFORMANCE STANDARDS
AREA PLAN SERVICE UNITS**

Attachment E-4

AGENCY NAME: Council on Aging Southern California				FISCAL YEAR: 2026-2027	
PROGRAM NAME(S): Elder Abuse Prevention				SERVICE AREAS: Countywide	
CONTRACT #: MA-012-24011305				DATE: July 1, 2026	
PROGRAM SERVICE	NUMBER OF ANNUAL SERVICE UNITS		UNDUPLICATED PERSONS SERVED	SERVICE CATEGORY	DESCRIPTION OF SERVICE UNITS
Elder Abuse Prevention	20	# of Public Education Sessions		Non-Registered	Public Education Sessions (1 Session): Planned presentations or participation in coordinated community-based fairs or events to inform and educate the public on the identification, prevention, and treatment of elder abuse, neglect, and exploitation. This can include outreach to promote financial literacy and prevent identity theft and financial exploitation of older individuals. One presentation or participation in one event, including extended events (lasting one or more days) is counted as one session.
	15	# of Training Sessions for Professionals			Training Sessions for Professionals (1 Session): Planned training for professionals (such as service providers, nurses, social workers, and other professionals serving elders and victims of elder abuse) on the identification, prevention, and treatment of elder abuse, neglect, and exploitation. Training topics may include elder self-determination, individual rights, and State and federal requirements concerning confidentiality. One presentation is counted as one session.
	6	# of Training Sessions for Caregivers			Training Sessions for Caregivers (1 Session): Training provided to unpaid adult caregivers (including caregivers receiving services from Title III-E) who are informal providers of in-home or community-based care to an older individual or to an individual with Alzheimer’s disease or a related disorder with neurological and organic brain dysfunction. Training should improve caregiver understanding of the identification, prevention, and treatment of elder abuse, neglect, and exploitation, with an emphasis on prevention and the enhancement of the elder individual’s self-determination and autonomy. One presentation is counted as one session.

**PERFORMANCE STANDARDS
AREA PLAN SERVICE UNITS**

Attachment E-4

PROGRAM SERVICE	NUMBER OF ANNUAL SERVICE UNITS		UNDUPLICATED PERSONS SERVED	SERVICE CATEGORY	DESCRIPTION OF SERVICE UNITS
Elder Abuse Prevention	300	# of Development Hours		Non-Registered	Development Hours (1 Hour): Systemic Coordination activities include staff time spent working with law enforcement agencies, adult protective services agencies, long-term care ombudsman programs, district attorneys, courts, the AAA, and others to create a coordinated response to elder abuse, neglect, and exploitation.
	8,000	# of Educational Materials Distributed			Educational Materials Distributed (1 Product): Printed or other educational media distributed for the identification, prevention, and treatment of, intervention in, investigation of, and response to elder abuse, neglect, and exploitation (including financial exploitation).
	3,000	# of Individuals Reached Through Activities			Individuals Reached Through Activities (1 Individual): A count of individuals who were reached by any of the activities funded with EAP resources and documented in the EAP Units of Service categories during the reporting period. Includes the number of individuals served directly by EAP providers/staff or indirectly through access to targeted, EAP-funded education or training activities or resources.

Subrecipient is required to report estimated count of Unduplicated Persons Served for each Elder Abuse Prevention service category.

**PERFORMANCE STANDARDS
AREA PLAN SERVICE UNITS**

Attachment E-4

AGENCY NAME: Council on Aging Southern California				FISCAL YEAR: 2026-2027	
PROGRAM NAME(S): Ombudsman				SERVICE AREAS: Countywide	
CONTRACT #: MA-012-24011305				DATE: July 1, 2026	
PROGRAM SERVICE	NUMBER OF ANNUAL SERVICE UNITS		UNDUPLICATED PERSONS SERVED	SERVICE CATEGORY	DESCRIPTION OF SERVICE UNITS
Long-Term Care Ombudsman	80%	% of Complaints Resolved		N/A	Performance Targets and Service Units Baseline Resolution Rate (% of Complaints Resolved): Number of complaints resolved plus Number of partially resolved complaints divided by the Total Number of Complaints Received equals Complaint Resolution Rate percentage.
	1,511	# of Resident Councils Attended			Work with Resident Councils (# of Resident Councils Attended): Number of Resident Council meetings attended. LTCO Programs help develop and/or support existing resident councils, by educating both residents and facility administration on the benefit of having one, and/or offering assistance with organization and procedures. It is important for the LTCO Program to treat the resident council as the “go to” place in the facility for addressing community concerns and establishing community connections.
	28	# of Family Councils Attended			Work with Family Councils (# of Family Councils Attended): Number of Family Council meetings attended. Family councils are regular meetings run by family and friends of residents with the support of facility staff. The LTCO Program role is to provide support and encouragement, as well as educational information to family members/friends of residents. LTCO Program may also offer assistance in developing good organizational and leadership skills to the family council members.
	5,007	# of Information and Assistance to Facility Staff			Information and Assistance to Facility Staff (# of Interactions): Count of instances of Ombudsman representatives’ interactions with facility staff for the purpose of providing general information and assistance unrelated to a complaint. Information and Assistance may be accomplished by telephone, letter, email, fax, or in person.

**PERFORMANCE STANDARDS
AREA PLAN SERVICE UNITS**

Attachment E-4

PROGRAM SERVICE	NUMBER OF ANNUAL SERVICE UNITS		UNDUPLICATED PERSONS SERVED	SERVICE CATEGORY	DESCRIPTION OF SERVICE UNITS
Long-Term Care Ombudsman	9,730	# of Information and Assistance to Individuals		N/A	Information and Assistance to Individuals (# of Interactions): Count of instances of Ombudsman representatives' interactions with residents, family members, friends, and others in the community for the purpose of providing general information and assistance unrelated to a complaint. Information and Assistance may be accomplished by: telephone, letter, email, fax, or in person.
	15	# of Community Education Sessions			Community Education Sessions (# of Sessions): LTCO Program participation in public events planned to provide information or instruction to community members about the LTCO Program or Long-Term-Care issues. The number of sessions refers to the number of events, not the number of participants.
	95%	% of Facilities Covered for SNFs (other than in response to a complaint)			Nursing Facility Coverage (other than in response to a complaint) (% of Facilities Covered): Percentage of nursing facilities within the PSA that were visited by an ombudsman representative at least once each quarter not in response to a complaint. The percentage is determined by dividing the number of nursing facilities in the PSA that were visited at least once each quarter not in response to a complaint by the total number of nursing facilities in the PSA. NOTE: This is not a count of <i>visits</i> but a count of <i>facilities</i> . In determining the number of facilities visited for this measure, no nursing facility can be counted more than once. <i>Baseline Resolution Rate: Number of Nursing Facilities visited at least once a quarter not in response to a complaint divided by the total number of Nursing Facilities equals Baseline percentage</i>
	80%	% of Facilities Covered for RCFEs (other than in response to a complaint)			Residential Care Facility for the Elderly (RCFE) Facility Coverage (other than in response to a complaint) (% of Facilities Covered): Percentage of RCFEs within the PSA that were visited by an Ombudsman representative at least once each quarter during the fiscal year not in response to a complaint. The percentage is determined by dividing the number of RCFEs in the PSA that were visited at least once each quarter not in response to a complaint by the total number of RCFEs in the PSA. NOTE: This is not a count of visits but a count of facilities. In determining the number of facilities visited for this measure, no RCFE can be counted more than once. <i>Baseline Resolution Rate: Number of RCFEs visited at least once a quarter not in response to a complaint divided by the total number of RCFEs equals Baseline percentage.</i>

**PERFORMANCE STANDARDS
AREA PLAN SERVICE UNITS**

Attachment E-4

PROGRAM SERVICE	NUMBER OF ANNUAL SERVICE UNITS		UNDUPLICATED PERSONS SERVED	SERVICE CATEGORY	DESCRIPTION OF SERVICE UNITS
Long-Term Care Ombudsman	14.50	# of Staff FTEs		N/A	Full-Time Equivalent (FTE) Staff (# of FTEs): This number may only include staff time legitimately charged to the LTCO Program. Time spent working for or in other programs may not be included in this number.
	27	# of Certified LTC Ombudsman Volunteers			Certified LTC Ombudsman Volunteers (# of Volunteers): Number of volunteers who are individually certified by the State Ombudsman in accordance with policies and procedures established by the State Ombudsman to serve as a representative of the OSLTCO.

**ATTACHMENT F-4
FEDERAL AWARD IDENTIFICATION**

1. Federal Award Identification

- A. Subrecipient Name:** Council on Aging Southern California
- B. Subrecipient’s Dun & Bradstreet Number (DUNS):** 053284159
- C. Subrecipient’s SAM Unique Entity Identifier (UEI):** LL8TLAJBVEF8
- D. Federal Award Identification Number (FAIN):** TBD
- E. Federal Award Date:** 2026-2027
- F. Subaward Period of Performance:** July 1, 2026, to June 30, 2027
- G. Total Amount of Federal Funds Obligated by the Action:** \$269,101

CFDA	FAIN	Award Date	Formula Funds	Amount
93.041	TBD	2026	Title VII-A	\$19,093
93.041	TBD	2027	Title VII-A	\$19,093
93.042	TBD	2026	Title VII-A	\$74,909
93.042	TBD	2027	Title VII-A	\$74,909
93.044	TBD	2026	Title III-B	\$40,548
93.044	TBD	2027	Title III-B	\$40,549
TOTAL:				\$269,101

- H. Total Amount of Federal Funds Obligated to the Subrecipient:** \$269,101
- I. Total Amount of the Federal Award:** TBD
- J. Federal Award Project Description:**
 - For III-B Programs – Special Programs for the Aging, Title III, Part B, Grants for Supportive Services and Senior Centers
 - For VII-A Programs – Special Programs for the Aging, Title VII, Chapter 3, Programs for Prevention of Elder Abuse, Neglect, and Exploitation; and Special Programs for the Aging, Title VII, Chapter 3, Long Term Care Ombudsman Services for Older Individuals
- K. Federal Awarding Agency:** U.S. Department of Health and Human Services, Administration for Community Living
- L. Name of Pass-Through Entity (PTE):** California Department of Aging and County of Orange Office on Aging
- M. Contact Information for the Awarding Official:** Claudia Harris, Director (714) 480-6465, claudia.harris@occr.ocgov.com
- N. CFDA Number and Name:** #93.041 Special Programs for the Aging, Title VII, Chapter 3, Programs for Prevention of Elder Abuse, Neglect, and Exploitation; #93.042 Special Programs for the Aging, Title VII, Chapter 3, Long Term Care Ombudsman Services for Older Individuals;

and #93.044 Special Programs for the Aging, Title III, Part B, Grants for Supportive Services and Senior Centers

O. Whether Award is R&D: No

P. Indirect Cost Rate for the Federal Award: 15%