

COUNTY OF MONTEREY STANDARD AGREEMENT

This **Agreement** is made by and between the County of Monterey, a political subdivision of the State of California (hereinafter "County") and:

Alzheimer's Disease & Related Disorders Association Inc.

(hereinafter "CONTRACTOR").

In consideration of the mutual covenants and conditions set forth in this Agreement, the parties agree as follows:

1.0 GENERAL DESCRIPTION:

The County hereby engages CONTRACTOR to perform, and CONTRACTOR hereby agrees to perform, the services described in **Exhibit A** in conformity with the terms of this Agreement. The goods and/or services are generally described as follows:

Provide:

family caregiver support for Monterey County residents.

2.0 PAYMENT PROVISIONS:

2.01 County shall pay the CONTRACTOR in accordance with the payment provisions set forth in **Exhibit A**, subject to the limitations set forth in this Agreement. The total amount payable by County to CONTRACTOR under this Agreement shall not exceed the sum of: \$ 87,270.00.

3.0 TERM OF AGREEMENT:

3.01 The term of this Agreement is from September 1, 2026 to June 30, 2027, unless sooner terminated pursuant to the terms of this Agreement. This Agreement is of no force or effect until signed by both CONTRACTOR and County and with County signing last, and **CONTRACTOR may not commence work before County signs this Agreement.**

3.02 The County reserves the right to cancel this Agreement, or any extension of this Agreement, without cause, with a thirty day (30) written notice, or with cause immediately.

4.0 SCOPE OF SERVICES AND ADDITIONAL PROVISIONS:

The following attached exhibits are incorporated herein by reference and constitute a part of this Agreement:

Exhibit A Scope of Services/Payment Provisions

Exhibit B Other: See page 11(a) for a list of Exhibits

5.0 PERFORMANCE STANDARDS:

- 5.01 CONTRACTOR warrants that CONTRACTOR and CONTRACTOR's agents, employees, and subcontractors performing services under this Agreement are specially trained, experienced, competent, and appropriately licensed to perform the work and deliver the services required under this Agreement and are not employees of the County, or immediate family of an employee of the County.
- 5.02 CONTRACTOR, its agents, employees, and subcontractors shall perform all work in a safe and skillful manner and in compliance with all applicable laws and regulations. All work performed under this Agreement that is required by law to be performed or supervised by licensed personnel shall be performed in accordance with such licensing requirements.
- 5.03 CONTRACTOR shall furnish, at its own expense, all materials, equipment, and personnel necessary to carry out the terms of this Agreement, except as otherwise specified in this Agreement. CONTRACTOR shall not use County premises, property (including equipment, instruments, or supplies) or personnel for any purpose other than in the performance of its obligations under this Agreement.

6.0 PAYMENT CONDITIONS:

- 6.01 Prices shall remain firm for the initial term of the Agreement and, thereafter, may be adjusted annually as provided in this paragraph. The County does not guarantee any minimum or maximum amount of dollars to be spent under this Agreement.
- 6.02 Negotiations for rate changes shall be commenced, by CONTRACTOR, a minimum of ninety days (90) prior to the expiration of the Agreement. Rate changes are not binding unless mutually agreed upon in writing by the County and the CONTRACTOR.
- 6.03 Invoice amounts shall be billed directly to the ordering department.
- 6.04 CONTRACTOR shall submit such invoice periodically or at the completion of services, but in any event, not later than 30 days after completion of services. The invoice shall set forth the amounts claimed by CONTRACTOR for the previous period, together with an itemized basis for the amounts claimed, and such other information pertinent to the invoice. The County shall certify the invoice, either in the requested amount or in such other amount as the County approves in conformity with this Agreement and shall promptly submit such invoice to the County Auditor-Controller for payment. The County Auditor-Controller shall pay the amount certified within 30 days of receiving the certified invoice.
- 6.05 CONTRACTOR shall not receive reimbursement for mileage or travel expenses unless set forth in this Agreement.

7.0 TERMINATION:

- 7.01 During the term of this Agreement, the County may terminate the Agreement for any reason by giving written notice of termination to the CONTRACTOR at least thirty (30) days prior to the effective date of termination. Such notice shall set forth the effective date of termination. In the event of such termination, the amount payable under this Agreement shall be reduced in proportion to the services provided prior to the date of termination.

7.02 The County may cancel and terminate this Agreement for good cause effective immediately upon written notice to CONTRACTOR. "Good cause" includes the failure of CONTRACTOR to perform the required services at the time and in the manner provided under this Agreement. If County terminates this Agreement for good cause, the County may be relieved of the payment of any consideration to CONTRACTOR, and the County may proceed with the work in any manner, which County deems proper. The cost to the County shall be deducted from any sum due the CONTRACTOR under this Agreement.

7.03 The County's payments to CONTRACTOR under this Agreement are funded by local, state and federal governments. If funds from local, state and federal sources are not obtained and continued at a level sufficient to allow for the County's purchase of the indicated quantity of services, then the County may give written notice of this fact to CONTRACTOR, and the obligations of the parties under this Agreement shall terminate immediately, or on such date thereafter, as the County may specify in its notice, unless in the meanwhile the parties enter into a written amendment modifying this Agreement.

8.0 INDEMNIFICATION:

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CONTRACTOR shall indemnify, defend, and hold harmless the County, its officers, officials, agents, employees, and volunteers from and against any and all claims, liabilities, and losses whatsoever (including damages to property and injuries to or death of persons, court costs, and reasonable attorneys' fees) occurring or resulting to any and all persons, firms or corporations furnishing or supplying work, services, materials, or supplies in connection with the performance of this Agreement, and from any and all claims, liabilities, and losses occurring or resulting to any person, firm, or corporation for damage, injury, or death arising out of or connected with the CONTRACTOR's performance of this Agreement, unless such claims, liabilities, or losses arise out of the sole negligence or willful misconduct of the County. "CONTRACTOR's performance" includes CONTRACTOR's action or inaction and the action or inaction of CONTRACTOR's officers, officials, employees, agents or subcontractors.

9.0 INSURANCE REQUIREMENTS:

9.01 **Evidence of Coverage:** Prior to commencement of this Agreement, the Contractor shall provide a "Certificate of Insurance" certifying that coverage as required herein has been obtained. Individual endorsements executed by the insurance carrier shall accompany the certificate. In addition, the Contractor upon request shall provide a certified copy of the policy or policies.

This verification of coverage shall be sent to the County's Contracts/Purchasing Department, unless otherwise directed. The Contractor shall not receive a "Notice to Proceed" with the work under this Agreement until it has obtained all insurance required and the County has approved such insurance. This approval of insurance shall neither relieve nor decrease the liability of the Contractor.

9.02 **Qualifying Insurers:** All coverages, except surety, shall be issued by companies which hold a current policy holder's alphabetic and financial size category rating of not less than A- VII, according to the current A.M. Best's Rating Guide or a company of equal financial stability that is approved by the County's Purchasing Agent.

9.03 **Insurance Coverage Requirements:** Without limiting CONTRACTOR's duty to

indemnify, CONTRACTOR shall maintain in effect throughout the term of this Agreement a policy or policies of insurance with the following minimum limits of liability:

Commercial General Liability Insurance: including but not limited to premises and operations, including coverage for Bodily Injury and Property Damage, Personal Injury, Contractual Liability, Broad form Property Damage, Independent Contractors, Products and Completed Operations, with a combined single limit for Bodily Injury and Property Damage of not less than \$1,000,000 per occurrence, and \$2,000,000 in the aggregate.

(Note: any proposed modifications to these general liability insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.)

Auto Liability Coverage: must include motor vehicles, including scheduled, non-owned, and hired vehicles, used in providing services under this Agreement, with a combined single limit or Bodily Injury and Property Damage of not less than \$1,000,000 per occurrence.

(Note: any proposed modifications to these auto insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.)

Workers' Compensation Insurance: if CONTRACTOR employs others in the performance of this Agreement, in accordance with California Labor Code section 3700 and with Employer's Liability limits not less than \$1,000,000 each person, \$1,000,000 each accident and \$1,000,000 each disease.

(Note: any proposed modifications to these Workers' Compensation Insurance requirements shall be attached as an Exhibit hereto, and the section(s) above that are proposed as not applicable shall be lined out in blue ink. All proposed modifications are subject to County approval.)

Professional Liability Insurance: if required for the professional services being provided, (e.g., those persons authorized by a license to engage in a business or profession regulated by the California Business and Professions Code), in the amount of not less than \$1,000,000 per claim and \$2,000,000 in the aggregate, to cover liability for malpractice or errors or omissions made in the course of rendering professional services. If professional liability insurance is written on a "claims-made" basis rather than an occurrence basis, the CONTRACTOR shall, upon the expiration or earlier termination of this Agreement, obtain extended reporting coverage ("tail coverage") with the same liability limits. Any such tail coverage shall continue for at least three years following the expiration or earlier termination of this Agreement.

(Note: Professional liability insurance coverage is required if the contractor is providing a professional service regulated by the state. Examples of service providers regulated by the state are insurance agents, professional architects and engineers, doctors, certified public accountants, lawyers, etc. However, other professional Contractors, such as computer or software designers, technology services, and services providers such as claims administrators, should also have professional liability. If in doubt, consult with your risk or contract manager.)

If the contractor maintains broader coverage and/or higher limits than the minimums shown above, the County requires and shall be entitled to the broader coverage and/or higher limits maintained by the contractor.

9.04 **Other Requirements:**

All insurance required by this Agreement shall be with a company acceptable to the County and issued and executed by an admitted insurer authorized to transact Insurance business in the State of California. Unless otherwise specified by this Agreement, all such insurance shall be written on an occurrence basis, or, if the policy is not written on an occurrence basis, such policy with the coverage required herein shall continue in effect for a period of three years following the date CONTRACTOR completes its performance of services under this Agreement.

Each liability policy shall provide that the County shall be given notice in writing at least thirty days in advance of any endorsed reduction in coverage or limit, cancellation, or intended non-renewal thereof. Each policy shall provide coverage for Contractor and additional insureds with respect to claims arising from each subcontractor, if any, performing work under this Agreement, or be accompanied by a certificate of insurance from each subcontractor showing each subcontractor has identical insurance coverage to the above requirements.

Additional Insured Status:

The County of Monterey, its officers, officials, employees, agents, and volunteers are to be covered as additional insureds on the auto liability policy for liability arising out of automobiles owned, leased, hired or borrowed by or on behalf of the Contractor. Auto liability coverage shall be provided in the form of an endorsement to the CONTRACTOR'S insurance.

The County of Monterey, its officers, officials, employees, agents, and volunteers are to be covered as additional insureds on the commercial general liability policy with respect to liability arising out of work or operations performed by or on behalf of the CONTRACTOR including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage shall be provided in the form of an endorsement to the CONTRACTOR'S insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 if a later edition is used).

Primary Coverage:

For any claims related to this contract, the CONTRACTOR'S insurance coverage shall be primary and non-contributory and at least as broad as ISO CG 20 01 04 13 as respects the County, its officers, officials, employees, agents, and volunteers. Any insurance or self-insurance maintained by the County, its officers, officials, employees, agents, or volunteers shall be excess of the CONTRACTOR'S insurance and shall not contribute with it. This requirement shall also apply to any Excess or Umbrella liability policies.

Workers' Compensation Insurance Waiver of Subrogation:

The Workers' Compensation Insurance policy required hereunder shall be endorsed to state that the Workers' Compensation Insurance carrier waives its right of subrogation against County, its officers, officials, employees, agents, or volunteers, which might arise by reason of payment under such policy in connection with performance under this Agreement by CONTRACTOR. Should CONTRACTOR be self-insured for Workers' Compensation Insurance, CONTRACTOR hereby agrees to waive its right of subrogation against County, its officers, officials, employees, agents, or volunteers.

Prior to the execution of this Agreement by the County, CONTRACTOR shall file certificates of insurance and endorsements with the County's contract administrator and County's Contracts/Purchasing Division, showing that the CONTRACTOR has in effect the insurance required by this Agreement. The CONTRACTOR shall file a new or amended certificate of insurance within five (5) calendar days after any change is made in any insurance policy, which would alter the information on the certificate then on file. Acceptance or approval of insurance shall in no way modify or change the indemnification clause in this Agreement, which shall continue in full force and effect. CONTRACTOR shall always during the term of this Agreement maintain in force the insurance coverage required under this Agreement and shall send, without demand by County, annual certificates to County's Contract Administrator and County's Contracts/Purchasing Division. If the certificate is not received by the expiration date, County shall notify CONTRACTOR and CONTRACTOR shall have five calendar days to send in the certificate, evidencing no lapse in coverage during the interim. Failure by CONTRACTOR to maintain such insurance is a default of this Agreement, which entitles County, at its sole discretion, to terminate this Agreement immediately.

10.0 RECORDS AND CONFIDENTIALITY:

- 10.01 **Confidentiality:** CONTRACTOR and its officers, officials, employees, agents, volunteers, and subcontractors shall comply with any and all federal, state, and local laws, which provide for the confidentiality of records and other information. CONTRACTOR shall not disclose any confidential records or other confidential information received from the County or prepared in connection with the performance of this Agreement, unless County specifically permits CONTRACTOR to disclose such records or information. CONTRACTOR shall promptly transmit to County any and all requests for disclosure of any such confidential records or information. CONTRACTOR shall not use any confidential information gained by CONTRACTOR in the performance of this Agreement except for the sole purpose of carrying out CONTRACTOR's obligations under this Agreement.
- 10.02 **County Records:** When this Agreement expires or terminates, CONTRACTOR shall return to County any County records which CONTRACTOR used or received from County to perform services under this Agreement.
- 10.03 **Maintenance of Records:** CONTRACTOR shall prepare, maintain, and preserve all reports and records that may be required by federal, state, and County rules and regulations related to services performed under this Agreement. CONTRACTOR shall maintain such records for a period of at least three years after receipt of final payment under this Agreement. If any litigation, claim, negotiation, audit exception, or other action relating to this Agreement is pending at the end of the three-year period, then CONTRACTOR shall retain said records until such action is resolved.
- 10.04 **Access to and Audit of Records:** The County shall have the right to examine, monitor and audit all records, documents, conditions, and activities of the CONTRACTOR and its subcontractors related to services provided under this Agreement. Pursuant to Government Code section 8546.7, if this Agreement involves the expenditure of public funds in excess of \$10,000, the parties to this Agreement may be subject, at the request of the County or as part of any audit of the County, to the examination and audit of the State Auditor pertaining

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to matters connected with the performance of this Agreement for a period of three years after final payment under the Agreement.

10.05 **Royalties and Inventions:** County shall have a royalty-free, exclusive and irrevocable license to reproduce, publish, and use, and authorize others to do so, all original computer programs, writings, sound recordings, pictorial reproductions, drawings, and other works of similar nature produced in the course of or under this Agreement. CONTRACTOR shall not publish any such material without the prior written approval of County.

10.06 **Format of Deliverables:** For this section, “Deliverables” shall mean all electronic documents CONTRACTOR provides to the County under this Agreement. CONTRACTOR shall ensure all Deliverables comply with the requirements of the Web Content Accessibility Guidelines (“WCAG”) 2.1, pursuant to the Americans with Disabilities Act (“ADA”). CONTRACTOR bears the burden to deliver Deliverables, such as Adobe Acrobat Portable Document Format (“PDF”) and Microsoft Office files, complying with WCAG 2.1. CONTRACTOR shall defend and indemnify the County against any breach of this Section. This Section shall survive the termination of this Agreement. Find more on Accessibility at this State website: <https://webstandards.ca.gov/accessibility/>.

11.0 **NON-DISCRIMINATION:**

11.01 During the performance of this Agreement, CONTRACTOR, and its subcontractors, shall not unlawfully discriminate against any person because of race, religious creed, color, sex, national origin, ancestry, physical disability, mental disability, medical condition, marital status, age (over 40), sexual orientation, or any other characteristic set forth in California Government code § 12940(a), either in CONTRACTOR’s employment practices or in the furnishing of services to recipients. CONTRACTOR shall ensure that the evaluation and treatment of its employees and applicants for employment and all persons receiving and requesting services are free of such discrimination. CONTRACTOR and any subcontractor shall, in the performance of this Agreement, fully comply with all federal, state, and local laws and regulations which prohibit discrimination. The provision of services primarily or exclusively to such target population as may be designated in this Agreement shall not be deemed to be prohibited discrimination.

12.0 **COMPLIANCE WITH TERMS OF STATE OR FEDERAL GRANTS:**

If this Agreement has been or will be funded with monies received by the County pursuant to a contract with the state or federal government in which the County is the grantee, CONTRACTOR will comply with all the provisions of said contract, to the extent applicable to CONTRACTOR as a subgrantee under said contract, and said provisions shall be deemed a part of this Agreement, as though fully set forth herein. Upon request, County will deliver a copy of said contract to CONTRACTOR, at no cost to CONTRACTOR.

13.0 **COMPLIANCE WITH APPLICABLE LAWS:**

13.01 CONTRACTOR shall keep itself informed of and in compliance with all federal, state, and local laws, ordinances, regulations, and orders, including but not limited to all state and federal tax laws that may affect in any manner the Project or the performance of the Services or those engaged to perform Services under this AGREEMENT as well as any privacy laws including, if applicable, HIPAA. CONTRACTOR shall procure all permits and licenses,

pay all charges and fees, and give all notices require by law in the performance of the Services.

13.02 CONTRACTOR shall report immediately to County's Contracts/Purchasing Officer, in writing, any discrepancy or inconsistency it discovers in the laws, ordinances, regulations, orders, and/or guidelines in relation to the Project of the performance of the Services.

13.03 All documentation prepared by CONTRACTOR shall provide for a completed project that conforms to all applicable codes, rules, regulations, and guidelines that are in force at the time such documentation is prepared.

14.0 INDEPENDENT CONTRACTOR:

In the performance of work, duties, and obligations under this Agreement, CONTRACTOR is always acting and performing as an independent contractor and not as an employee of the County. No offer or obligation of permanent employment with the County or County department or agency is intended in any manner, and CONTRACTOR shall not become entitled by virtue of this Agreement to receive from County any form of employee benefits including but not limited to sick leave, vacation, retirement benefits, workers' compensation coverage, insurance or disability benefits. CONTRACTOR shall be solely liable for and obligated to pay directly all applicable taxes, including federal and state income taxes and social security, arising out of CONTRACTOR's performance of this Agreement. In connection therewith, CONTRACTOR shall defend, indemnify, and hold County harmless from any and all liability which County may incur because of CONTRACTOR's failure to pay such taxes.

15.0 NOTICES:

Notices required under this Agreement shall be delivered personally or by first-class, postage pre-paid mail to the County and CONTRACTOR'S contract administrators at the addresses listed below:

FOR COUNTY
Roderick W. Franks
Name
Director
Title
1000 S. Main St., Suite 301, Salinas, CA 93901
Address
(831) 755-4430
Phone

FOR CONTRACTOR
Philip Geiger
Name
Regional Director
Title
2 Lower Ragsdale Dr., Suite 150, Monterey, CA 93940
Address
(831) 900-5902
Phone

16.0 MISCELLANEOUS PROVISIONS.

16.01 **Conflict of Interest:** CONTRACTOR represents that it presently has no interest and agrees not to acquire any interest during the term of this Agreement, which would directly, or indirectly conflict in any manner or to any degree with the full and complete performance

of the services required to be rendered under this Agreement.

- 16.02 **Amendment:** This Agreement may be amended or modified only by an instrument in writing signed by the County and the CONTRACTOR.
- 16.03 **Waiver:** Any waiver of any terms and conditions of this Agreement must be in writing and signed by the County and the CONTRACTOR. A waiver of any of the terms and conditions of this Agreement shall not be construed as a waiver of any other terms or conditions in this Agreement.
- 16.04 **Contractor:** The term “CONTRACTOR” as used in this Agreement includes CONTRACTOR’s officers, officials, employees, agents, volunteers and subcontractors acting on CONTRACTOR’s behalf in the performance of this Agreement.
- 16.05 **Disputes:** CONTRACTOR shall continue to perform under this Agreement during any dispute.
- 16.06 **Assignment and Subcontracting:** The CONTRACTOR shall not assign, sell, or otherwise transfer its interest or obligations in this Agreement without the prior written consent of the County. None of the services covered by this Agreement shall be subcontracted without the prior written approval of the County. Notwithstanding any such subcontract, CONTRACTOR shall continue to be liable for the performance of all requirements of this Agreement.
- 16.07 **Successors and Assigns:** This Agreement and the rights, privileges, duties, and obligations of the County and CONTRACTOR under this Agreement, to the extent assignable or delegable, shall be binding upon and inure to the benefit of the parties and their respective successors, permitted assigns, and heirs.
- 16.08 **Headings:** The headings are for convenience only and shall not be used to interpret the terms of this Agreement.
- 16.09 **Time is of the Essence:** Time is of the essence in each and all of the provisions of this Agreement.
- 16.10 **Governing Law:** This Agreement shall be governed by and interpreted under the laws of the State of California; venue shall be Monterey County.
- 16.11 **Non-exclusive Agreement:** This Agreement is non-exclusive and both County and CONTRACTOR expressly reserve the right to contract with other entities for the same or similar services.
- 16.12 **Construction of Agreement:** The County and CONTRACTOR agree that each party has fully participated in the review and revision of this Agreement and that any rule of construction to the effect that ambiguities are to be resolved against the drafting party shall not apply in the interpretation of this Agreement or any amendment to this Agreement.
- 16.13 **Counterparts:** This Agreement may be executed in two or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same Agreement.

16.14 **Authority:** Any individual executing this Agreement on behalf of the County or the CONTRACTOR represents and warrants hereby that he or she has the requisite authority to enter into this Agreement on behalf of such party and bind the party to the terms and conditions of this Agreement.

16.15 **Integration:** This Agreement, including the exhibits, represent the entire Agreement between the County and the CONTRACTOR with respect to the subject matter of this Agreement and shall supersede all prior negotiations, representations, or agreements, either written or oral, between the County and the CONTRACTOR as of the effective date of this Agreement, which is the date that the County signs the Agreement.

16.16 **Interpretation of Conflicting Provisions:** In the event of any conflict or inconsistency between the provisions of this Agreement and the Provisions of any exhibit or other attachment to this Agreement, the provisions of this Agreement shall prevail and control.

17.0 CONSENT TO USE OF ELECTRONIC SIGNATURES.

17.01 The parties to this Agreement consent to the use of electronic signatures via DocuSign to execute this Agreement. The parties understand and agree that the legality of electronic signatures is governed by state and federal law, 15 U.S.C. Section 7001 et seq.; California Government Code Section 16.5; and, California Civil Code Section 1633.1 *et. seq.* Pursuant to said state and federal law as may be amended from time to time, the parties to this Agreement hereby authenticate and execute this Agreement, and any and all Exhibits to this Agreement, with their respective electronic signatures, including any and all scanned signatures in portable document format (PDF).

17.02 **Counterparts.**

The parties to this Agreement understand and agree that this Agreement can be executed in two (2) or more counterparts and transmitted electronically via facsimile transmission or by delivery of a scanned counterpart in portable document format (PDF) via email transmittal.

17.03 **Form: Delivery by E-Mail or Facsimile.**

Executed counterparts of this Agreement may be delivered by facsimile transmission or by delivery of a scanned counterpart in portable document format (PDF) by e-mail transmittal, in either case with delivery confirmed. On such confirmed delivery, the signatures in the facsimile or PDF data file shall be deemed to have the same force and effect as if the manually signed counterpart or counterparts had been delivered to the other party in person.

***** THIS SECTION INTENTIONALLY LEFT BLANK *****

18.0 SIGNATURE PAGE

IN WITNESS WHEREOF, County and CONTRACTOR have executed this Agreement as of the day and year written below.

COUNTY OF MONTEREY	
By:	
	County Purchasing Agent ¹
Date:	
By:	
	Department Head (if applicable)
Date:	
	Approved as to Form Office of the County Counsel, ² Susan K. Blitch, County Counsel
By:	 Anne Branton
	A46091E5DE63489... County Counsel
Date:	7/30/2026 10:40 AM PDT
	Approved as to Fiscal Provisions ³
By:	 Patricia Ruiz
	E79EF64E57454F6... Auditor-Controller
Date:	7/31/2026 8:39 AM PDT
	Reviewed as to Liability Provisions ⁴ Office of the County Counsel-Risk Management
By:	
	David Bolton, Risk Manager
Date:	

CONTRACTOR	
Alzheimer's Disease & Related Disorders Association Inc.	
Contractor/Business Name*	
By:	 Moreblessing Dzivakwe 1874B0863D2849C...
Date:	7/29/2026 1:00 PM PDT
(Signature of Chair, President, or Vice-President)	
Moreblessing Dzivakwe, VP Sponsored Programs	
Name and Title	
By:	 Mark Leon DDFBA70B862C47D...
Date:	7/30/2026 10:02 AM PDT
Mark Leon, CFO	
Name and Title	
(Signature of Secretary, Assist. Secretary, CFO, Treasurer or Assist. Treasurer)	

County Board of Supervisors' Agreement No. _____ approved on _____

*INSTRUCTIONS: If CONTRACTOR is a corporation, including non-profit corporations, the full legal name of the corporation shall be set forth above together with the signatures of two (2) specified officers (California Corporations Code §, 313). If CONTRACTOR is a Limited Liability Corporation (LLC), the full legal name of the LLC shall be set forth above together with the signatures of either 1) any member or 2) two (2) managers (Corporations Code § 17703.01, subds. (a) and (d)). If CONTRACTOR is a partnership, the full legal name of the partnership shall be set forth above together with the signature of a partner who has authority to execute on behalf of the partnership. If CONTRACTOR is contracting in an individual capacity, the individual shall set forth the name of the business, if any, and shall personally sign.

1Approval by the County Purchasing Agent or designee is required.

2Approval by the office of the County Counsel is required.

3Approval by Auditor-Controller or designee is required.

4Review by Risk Manager is required only if changes are made in the indemnification or Insurance paragraphs.

LIST OF EXHIBITS
Alzheimer's Disease & Related Disorders Association

Exhibit A	Scope of Work/Payment Provisions
Exhibit A-1	Scope of Work/Title III-E Family Caregiver
Exhibit B	DSS Additional Provisions
Exhibit C	Budget
Exhibit D-1	Sample Invoice
Exhibit D-2	Sample Annual Closeout Summary
Exhibit D-3	Equipment Acquisition Report
Exhibit D-4	Equipment Acquisition Guidelines
Exhibit D-5	Inventory List
Exhibit D-6	Sample Quarterly Narrative Report
Exhibit E	Lobbying Certification
Exhibit F	Audit & Recovery of Overpayments
Exhibit F-1	Schedule of County Program
Exhibit G	Elder Abuse & Neglect Reporting
Exhibit H	Modifications to Standard Agreement

SCOPE OF WORK/PAYMENT PROVISIONS

ALZHEIMER'S DISEASE & RELATED DISORDERS ASSOCIATION INC

- A. TOTAL FUNDING:** \$87,270
- B. CONTRACT TERM:** September 1, 2026 – June 30, 2027
- C. CONTACT INFORMATION:**
- County Contract Monitor: Thomas De La Cruz, Management Analyst III
Area Agency on Aging (AAA)
Department of Social Services (DSS),
Aging and Adult Services Branch (AAS)
730 La Guardia Street
Salinas, CA 93905
(831) 796-3391
delacruz@countyofmonterey.gov
- Contact & Disaster Preparedness Coordinator: Philip Geiger
Regional Director
2 Lower Ragsdale Drive, Suite 150
Monterey, CA 93940
(831) 900-5902
Fax: (831) 655-9241
pmgeiger@alz.org
- Location of Services: Alzheimer's Association
2 Lower Ragsdale Drive, Suite 150, Monterey, CA 93940
- Days and Hours of Service: Monday through Friday, 9:00 a.m. until 5:00 p.m.
24-hours/7 days a week helpline at (800) 272-3900
- D. CONTRACT AWARD INFORMATION:**
- CONTRACTOR UEI Number: XFDHU5UJG8S9
- Date County Awarded Funding: 7/1/2026
- Sub-award: State of California Department of Aging (CDA)
- Federal Award Identification Number (FAIN): AAA-2627-32-02
- CFDA and Dollar Amount: 93.052 (Title III E, Family Caregiver Support Program), \$87,270
- Federal Award Description: Older Americans Act, Title III E, Family Caregiver Support Program
- Research and Development: No
- Indirect Cost Rate: Maximum reimbursable indirect rate of 15% is allowable by Monterey County under this contract. Amounts over that threshold and up to the Federally Negotiated Indirect Cost Rate Agreement (FNICRA) of 30% will be funded by the CONTRACTOR and may be used as part of the in-kind match required.

SCOPE OF WORK/PAYMENT PROVISIONS

This Agreement was awarded to Alzheimer's Association through Request for Proposal (RFP) #10933 in May 2024. The initial term of the Agreement was for Fiscal Year (FY) 2024-25, with the option to extend for up to three (3) additional one (1) year terms for FY 2025-26, FY 2026-27, and FY 2027-28, subject to mutual agreement of the parties and continued availability of funding. This Agreement is currently in effect for FY 2026-27.

E. BACKGROUND:

Since 2006, the Area Agency on Aging (AAA) has contracted with the Alzheimer's Association to support caregivers of individuals with Alzheimer's Disease through the Title III E Family Caregiver Support Program. This program provides a variety of services, including Caregiver Information Services and Caregiver Information and Assistance, which offer educational resources and guidance to help caregivers access support. Caregiver Counseling provides emotional support for stress, depression, and loss, while Caregiver Support Groups create a space for sharing experiences and coping strategies. Together, these services promote caregiver well-being and ensure they have the resources needed to provide quality care.

F. COMPLIANCE REQUIREMENTS:

This Agreement is supported with State and Federal funds and requires compliance with all regulations under the following laws, regulations and requirements, including but not limited to the following:

- F.1 Clean Air Act, as amended. [42 USC § 7401]
- F.2 Federal Water Pollution Control Act, as amended. [33 USC 1251, et seq.]
- F.3 Environmental Protection Agency Regulations. [40 CFR 29] [Executive Order 11738]
- F.4 State Contract Code (Cal. Pub. Con. Code § 10295 et seq.)
- F.5 Unruh Civil Rights Act (Cal. Pub. Con. Code § 2010)
- F.6 Occupational Safety and Health Administration applicable regulations [OSHA Act].
- F.7 California Department of Aging (CDA) Program Guide:
The CDA Program Guide has been created and is intended for use by CDA and the COUNTY and CONTRACTOR as a reference tool for the provision of Older Californians Act (OCA) and Older Americans Act (OAA) programs. It is also intended to be used as a reference tool for monitoring and for internal and external audits.

The Program Guide defines the responsibilities for providing OAA and OCA assistance and/or related support services to eligible older adults, adults with disabilities, family caregivers, and residents in long-term care facilities.

The Program Guide is maintained, updated, and revised by CDA. Updates are made on an annual basis, at the beginning of each state fiscal year, or whenever there is an update to federal and/or state laws, regulations, policies, and/or directives that impact guidance provided within the Program Guide.

The official copy of the Program Guide shall be kept and maintained on CDA's webpage found here:

https://aging.ca.gov/Providers_and_Partners/Area_Agencies_on_Aging/Memorandums_of_Understanding/

F.8 AAA Service Provider's Handbook:

SCOPE OF WORK/PAYMENT PROVISIONS

CONTRACTOR shall comply with the policies and procedures established by the County of Monterey AAA as outlined in the AAA Service Providers' Handbook. The Handbook establishes local requirements and operational procedures applicable to all AAA funded service providers. An electronic version of the Handbook is available upon request and is incorporated into this Agreement by reference.

F.9 Copyrights:

Materials developed with funding from the CDA may be subject to copyright; however, the State reserves the right to copyright such materials. The COUNTY or CONTRACTOR shall not copyright materials funded by CDA unless prior written approval is obtained from the Director of CDA through the COUNTY. If approval is granted, the State retains a royalty-free, non-exclusive, and irrevocable license to reproduce, prepare derivative works, publish, distribute, and otherwise use the materials, in whole or in part, and to authorize others to do so, provided appropriate credit is given to the author. The COUNTY and CONTRACTOR shall maintain appropriate systems and internal controls to ensure that State funds are not used in violation of applicable copyright laws, including the acquisition, operation, or maintenance of computer software.

F.10 Records Retention:

The CONTRACTOR shall maintain complete and accurate records related to the performance of this Agreement, including financial, contractual, and program records; client or participant records; and electronic files documenting activities and expenditures under this Agreement. All records shall be available for inspection, review, and audit by the State, the COUNTY, or their authorized representatives during normal business hours.

G. SERVICES TO BE PROVIDED BY CONTRACTOR:

CONTRACTOR shall provide the services outlined in **Exhibits A and A-1** attached. Services shall be provided to residents of Monterey County.

H. AGING AND DISABILITY RESOURCE CONNECTION (ADRC):

CONTRACTOR shall be part of the Monterey County Aging and Disability Resource Connection (ADRC) no wrong door service delivery model, by joining the ADRC network, participating in meetings, referring, and sharing information to break down silos between programs and services for older adults, adults with disabilities, and their families.

- H.1 Joining the ADRC network as a partner agency,
- H.2 Participating in bi-monthly ADRC meetings,
- H.3 Referring individuals to ADRC partner agencies,
- H.4 Connecting individuals with other services through a warm hand-off when possible, and
- H.5 Sharing information about your agency's services with ADRC partners.

I. TARGETING POLICY:

Recognizing that resources are limited and not all the needs of older residents can be met through Older Americans Act funding, CONTRACTOR is required to ensure best efforts and attempts are demonstrated for reaching older adults in greatest economic and social need.

CONTRACTOR is required to target older adults who face the greatest economic and social need as defined in Title 45 CFR Section 1321.3 "Definitions."

SCOPE OF WORK/PAYMENT PROVISIONS

- “Greatest economic need” means the need resulting from an income level at or below the Federal poverty threshold and as further defined by State and area plans based on local and individual factors, including geography and expenses.
- “Greatest social need” includes any of the following noneconomic factors: physical or mental disability, language barriers, and cultural, social, or geographical isolation due to, among other things, racial or ethnic status, Native American identity, religious affiliation, sexual orientation, human immunodeficiency virus (HIV) status, gender identity, gender expression, chronic conditions, housing instability, food insecurity, lack of access to water, lack of transportation, and interpersonal safety concerns. Including any other status that restricts the ability of an individual to perform normal or routine daily tasks, threatens the capacity of the individual to live independently, or any other needs as further defined by area plans based on local factors.

Particular attention is required to serve older individuals that are:

- Low-income minorities
- Native Americans
- Residents in rural areas
- Limited English-Proficient (LEP) speakers
- At risk for institutionalization
- Older adults with disabilities
- Older adults with Alzheimer’s disease or related dementias
- Lesbian, Gay, Bisexual, Transgender, Queer, and Intersex (LGBTQI+) persons
- Persons living with human immunodeficiency virus (HIV) or Acquired Immunodeficiency Syndrome (AIDS) or other chronic conditions.

J. GETCARE LICENSES:

COUNTY will pay for one (1) GetCare license each month. Any additional licenses shall be the financial responsibility of CONTRACTOR. To obtain additional licenses, e-mail bushml@countyofmonterey.gov. Licenses will be issued to individuals. When there is a change in staff, CONTRACTOR must notify the COUNTY in writing within 15 days.

K. AUDIT PROVISIONS:

CONTRACTOR is required to provide an audit as per the terms in **Exhibit F**. Additionally, CONTRACTOR shall ensure that State-Funded expenditures are displayed along with the related federal expenditures in the Single Audit report “Schedule of Expenditures of Federal Awards” (SEFA) under the appropriate Catalog of Federal Domestic Assistance (CFDA) number as referenced in **Exhibit A-1**.

L. EQUIPMENT:

CONTRACTOR must receive prior approval from COUNTY in writing for equipment purchases of over \$5,000. Property with per unit cost of \$5,000 or more, all computing devices regardless of cost including but not limited to, workstations, servers, laptops, personal digital assistants, notebook computers, tablets, smartphones, and cellphones), and all portable electronic storage media regardless of cost (including but not limited to, thumb/flash drives and portable hard drives) regardless of cost, require justification and approval by COUNTY.

Competitive quotations shall be solicited for Equipment purchases and COUNTY will provide guidelines when quotes are required and how many quotes are required.

SCOPE OF WORK/PAYMENT PROVISIONS

- L.1 Less than \$3,000 – One quote minimum is required.
- L.2 More than \$3,000 but less than \$15,000 – A minimum of two quotes is required.
- L.3 Greater than \$15,000 but less than \$50,000 – Three quotes are required.

Prices may be obtained from competitive bids, catalogs, price lists, letters, telephone quotation, agreements, multi-user contact or verbally. The names of the businesses submitting quotations, date and amount of each quotation shall be recorded and maintained. The CONTRACTOR will select the quote that is most advantageous to the CONTRACTOR AND COUNTY. The action and results must be documented.

Exhibit D-3, Equipment Acquisition Report, shall accompany CONTRACTOR's invoice to COUNTY as appropriate.

Equipment must be received by June 30, 2027, for expenses to be claimed against this Agreement. Any equipment or physical assets obtained by CONTRACTOR utilizing funds pursuant to the terms of this Agreement shall be inventoried and considered the property of COUNTY and tendered to the COUNTY upon termination of services by CONTRACTOR. Any equipment no longer needed by CONTRACTOR must be tendered to the COUNTY. Equipment purchase guidelines are outlined in **Exhibit D-4**. A current Inventory Listing of all equipment shall be maintained and updated with each contract and amended contract as needed (**Exhibit D-5**).

M. PROGRAM INCOME:

Program income is defined as revenue generated by CONTRACTOR through contract-support activities and includes:

- Voluntary contributions received from a participant or other party for services rendered;
- Income from usage or rental fees of real or personal property acquired with grant funds or funds provided under this Agreement;
- Royalties received on patents and copyrights from contract-supported activities; and
- Proceeds from the sale of items purchased under a AAA agreement (REQUIRES WRITTEN APPROVAL FROM AAA).

It is required that the CONTRACTOR provide each recipient of a AAA funded service with an opportunity to voluntarily contribute. Those funds must be tracked and considered program income for that particular service. There shall be no tracking of recipients regarding contributions or lack of contributions. Estimated contributions are included in attached budgets and shall be used to expand the service.

All Program Income must be received within the contract term and must be spent by the end of the fiscal year, June 30, 2027.

N. INVOICE/PAYMENT PROVISIONS:

Claims for Payment will be submitted electronically through the GetCare system.

CONTRACTOR shall comply with the appropriate benchmark requirements for service units to be delivered in order to draw down contract funds in accordance with the terms of this Agreement. The applicable benchmark for each type of service is identified in **Exhibit A-1** Section A, Services to be Provided, and Section B, Performance Reporting.

SCOPE OF WORK/PAYMENT PROVISIONS

Ten percent (10%) of the maximum amount of grant funds may be drawn down per month. Amounts greater than 10% may be approved by the County Contract Manager.

COUNTY shall pay CONTRACTOR in accordance with **Exhibit B**, Section I. PAYMENT BY COUNTY. Claims for payment shall be submitted in the form set forth in **Exhibit D-1**, Sample Invoice, by the 10th day of the month for services rendered in the previous month, with the final invoice due no later than June 10, 2027. CONTRACTOR acknowledges that all funding under this Agreement will be exhausted by May 31, 2027; however, services will continue through June 30, 2027, with other program funding and will be recorded as Cash Match.

Exhibit D-2, Annual Closeout Summary, shall be submitted by CONTRACTOR to COUNTY no later than July 20, 2027.

O. MATCH REQUIREMENT:

Title III-E requires a local cash/in-kind match of **25.0%**. The required match is calculated by taking the total program costs less program income and non-matching contributions, multiplied by the matching requirement percentage.

P. PAYMENT SUMMARY:

<i>Funding Type Title III-E, FCSP</i>	<i>Fiscal Year 2026-27 TOTALS</i>
Caregiver Information Services (Includes both Community Education on Caregiving and Public Information on Caregiving)	\$ 40,166.00
Caregiver Information and Assistance	\$ 16,104.00
Caregiver Counseling	\$ 18,750.00
Caregiver Support Groups	\$ 12,250.00
TOTAL:	\$ 87,270.00

The total amount payable by COUNTY to CONTRACTOR for the period September 1, 2026, through June 30, 2027, shall not exceed **eighty-seven thousand, two hundred seventy dollars (\$87,270)**.

This Agreement is funded by the California Department of Aging (CDA) Agreement # AAA-2526-32-03. The terms and conditions of the Agreement are incorporated herein by reference, and on file with COUNTY's Department of Social Services. Upon request, COUNTY will provide an electronic copy of the Agreement to CONTRACTOR.

(End of Exhibit A)

SCOPE OF WORK/PAYMENT PROVISIONS

TITLE III-E (CFDA #93.052) FAMILY CAREGIVER SUPPORT PROGRAM SCOPE OF SERVICES

A. SERVICES TO BE PROVIDED

CONTRACTOR shall provide information services, support services, and access services to family caregivers. Services shall be provided in accordance with the California Code of Regulations, Title 22, Social Security, Division 1.8, California Department of Aging.

Family Caregiver Support Program - An adult (18 years of age or older) family member or another individual (e.g., friend or neighbor) who is an informal (i.e., unpaid) provider of in-home or community care to a care receiver. A care receiver is an older individual (60 years of age or older) with Alzheimer's disease or related disorders with neurological and organic brain dysfunction. [OAA § 302(3)]

A.1 Service:

Caregiver Information Services (Non-Registered)

Unit of Service Definition:

- An FCSP public and media activity that conveys information to caregivers about available services, including in-person interactive presentations, booths/exhibits, or radio, TV, or website events. This service is not tailored to the needs of the individual.
- An FCSP service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services (e.g., a booth at a health fair).

Unit of Service Measurement:

1 Activity

Estimated Service Units to be delivered:

300 Activities

Benchmark of Service Units to be delivered:

by September 30th:	30 Units	(10%)
by December 31st:	120 Units	(40%)
by March 31st:	210 Units	(70%)
by June 30th:	300 Units	(100%)

A.2 Service:

Caregiver Information and Assistance (Non-Registered)

Unit of Service Definition:

- An FCSP service that provides the individuals with current information on opportunities and services available to the individuals within their communities; assesses the problems and capacities of the individual; links the individual to services; and ensures that the individual receives services they need.
- An FCSP service involving interventions (one-on-one contacts with individuals) initiated by an agency or provider for the purpose of identifying

SCOPE OF WORK/PAYMENT PROVISIONS

caregivers and encouraging their use of existing caregiver support services (e.g., AAA staff contacts with potential caregivers outside of local market).

- An FCSP service for the provision of bilingual communication assistance to a caregiver in order to access assistance and receive support for his or her caregiving responsibilities (e.g., staff interpreting dialogue between caregiver and care consultant staff translating an elder's prescription drug label for his caregiver).

Unit of Service Measurement:

1 Contact

Estimated Service Units to be delivered:

250 Contacts

Benchmark of Service Units to be delivered:

by September 30th:	25 Units	(10%)
by December 31st:	100 Units	(40%)
by March 31st:	175 Units	(70%)
by June 30th:	250 Units	(100%)

A.3 Service:

Caregiver Counseling (Registered)

Unit of Service Definition:

- An FCSP service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of support needed for stress, depression, and loss resulting from caregiving responsibilities. This service may:
 - Involve his or her informal support system,
 - Be individual direct sessions and/or telephone consultations, and
 - Address caregiving-related financial and long-term placement responsibilities
- An FCSP service provided by experienced volunteers on the condition that appropriate training and qualified supervision protocols are in place.

Unit of Service Measurement:

1 Hour

Estimated Service Units to be delivered:

150 Hours

Benchmark of Service Units to be delivered:

by September 30th:	15 Units	(10%)
by December 31st:	60 Units	(40%)
by March 31st:	105 Units	(70%)
by June 30th:	150 Units	(100%)

A.4 Service:

Caregiver Support Groups (Non-Registered)

Unit of Service Definition:

An FCSP service provided to a group of caregivers that is led by a trained individual; conducted at least monthly within a supportive setting or via a controlled access, moderated online or teleconference approach; for the purpose of sharing experiences, concerns, and ideas to ease the stress of caregiving, and

SCOPE OF WORK/PAYMENT PROVISIONS

to improve decision-making and problem-solving skills related to their caregiving responsibilities.

Unit of Service Measurement:

1 Session

Estimated Service Units to be delivered:

300 Sessions

Benchmark of Service Units to be delivered:

by September 30th:	30 Units	(10%)
by December 31st:	120 Units	(40%)
by March 31st:	210 Units	(70%)
by June 30th:	300 Units	(100%)

B. PERFORMANCE REPORTING

CONTRACTOR shall enter data monthly into the AAA GetCare System by the 10th day of the month following the month of service.

- B.1 Caregiver Information Services: These services are considered non-registered and require estimated unduplicated client counts and service units.
- B.2 Caregiver Information and Assistance: These services are considered non-registered and require estimated unduplicated client counts and service units.
- B.3 Caregiver Counseling: These services are considered registered which require unduplicated client counts and profile information such as name, birthdate, zip code, Veteran status, etc. for Caregivers. Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs) for Care Receivers.
- B.4 Caregiver Support Groups: These services are considered non-registered and require estimated unduplicated client counts and service units.

CONTRACTOR shall provide a Quarterly Narrative Report to the COUNTY describing the progress of services by October 10, 2026, January 10, 2027, April 10, 2027, and July 10, 2027. The Quarterly Narrative Report shall be in the form of **Exhibit D-6**.

COUNTY has an expectation that a certain number of services are delivered within each reporting period. The benchmark is determined by dividing the service units into the number of months within the contract term (quarterly if it is a quarterly function). The COUNTY has expectations that CONTRACTOR will deliver the contracted service units within 20% of the benchmark.

If CONTRACTOR falls below the required benchmark percentage for two (2) consecutive quarters, and if requested by the COUNTY, CONTRACTOR will provide a corrective action plan to the AAA describing the reason for the occurrence and a plan to meet the benchmark.

SCOPE OF WORK/PAYMENT PROVISIONS

C. MATCH REQUIREMENTS

Title III-E requires a local cash/in-kind match of 25.0%. The required match is calculated by taking the total program costs less program income and non-matching contributions, multiplied by the matching requirement percentage.

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EXHIBIT B

**COUNTY OF MONTEREY
DEPARTMENT OF SOCIAL SERVICES
ADDITIONAL PROVISIONS**

I. PAYMENT BY COUNTY:

1.01 Monthly Claims/Invoices by CONTRACTOR:

Not later than the tenth (10th) day of each month, CONTRACTOR shall submit to COUNTY a signed invoice setting forth the amount claimed. All invoices (monthly and final) shall be submitted in the form set forth in **Exhibit D-1**.

1.02 Final Invoice; Forfeiture for Late Invoice:

CONTRACTOR's final month and end of fiscal year invoice is due, and must be received by COUNTY, no later than close of business on **July 10th**. **If the Final Invoice is not received by COUNTY by close of business on July 10th. CONTRACTOR understands and agrees that the reimbursement of CONTRACTOR's final expenses represented by that invoice may be forfeited, and COUNTY shall have no legal obligation regarding it, nor shall COUNTY be required to make any payment towards that untimely/late invoiced claim.**

1.03 Allowable Costs:

a) Allowable costs shall be the CONTRACTOR's actual costs of developing, supervising and delivering the services under this Agreement, as set forth in **Exhibit C**. Only the costs listed in **Exhibit C** as contract expenses may be claimed as allowable costs. Any dispute over whether costs are allowable shall be resolved in accordance with the provisions of 45 Code of Federal Regulations, Part 74, Sub-Part F and 48 Code of Federal Regulations (CFR), Chapter 1, Part 31.

b) Allowable costs for travel expenses incurred while providing services under this Agreement, as set forth in **Exhibit C**, must follow the County of Monterey Auditor/Controller's Travel Policy <https://www.countyofmonterey.gov/government/departments-a-h/auditor-controller/policies-and-procedures> and should be invoiced the current per diem rates for lodging, meals, and mileage up to the rates listed online at www.irs.gov/tax-professionals/standard-mileage-rates.

1.04 Cost Control:

CONTRACTOR shall not exceed by more than twenty (20) percent any contract expense line-item amount in the budget without the written approval of COUNTY, given by and through the Contract Administrator or Contract Administrator's designee. CONTRACTOR shall submit an amended budget with its request for such approval. Such approval shall not permit CONTRACTOR to receive more than the maximum total amount payable under this contract. Therefore, an increase in one-line item will require corresponding decreases in other line items.

1.05 Payment in Full:

a) If COUNTY certifies and pays the amount requested by CONTRACTOR, such payment shall be deemed payment in full for the month in question and may not thereafter be reviewed or modified, except to permit COUNTY's recovery of overpayments.

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b) If COUNTY certifies and pays a lesser amount than the amount requested, COUNTY shall, immediately upon certification of the lesser amount, notify CONTRACTOR in writing of such certification. If CONTRACTOR does not protest the lesser amount by delivering to COUNTY a written notice of protest within twenty (20) days after CONTRACTOR's receipt of the certification, then payment of the lesser amount shall be deemed payment in full for the month in question and may not thereafter be questioned by CONTRACTOR.

1.06 Disputed Payment Amount:

If COUNTY pays a lesser amount than the amount requested, and if CONTRACTOR submits a written notice of protest to COUNTY within twenty (20) days after CONTRACTOR's receipt of the certification, then the parties shall promptly meet to review the dispute and resolve it on a mutually acceptable basis. No court action may be taken on such dispute until the parties have met and attempted to resolve the dispute in person.

II. PERFORMANCE STANDARDS & COMPLIANCE

2.01 Outcome Objectives and Performance Standards:

CONTRACTOR shall for the entire term of this Agreement provide the service outcomes set forth in **Exhibit A** and **Exhibit A-1**. CONTRACTOR shall meet the contracted level of service and the specified performance standards described in **Exhibit A** and **Exhibit A-1**, unless prevented from doing so by circumstances beyond CONTRACTOR's control, including but not limited to, natural disasters, fire, theft, and shortages of necessary supplies or materials due to labor disputes.

2.02 County Monitoring of Services:

COUNTY shall monitor services provided under this Agreement in order to evaluate the effectiveness and quality of services provided.

2.03 Notice of Defective Performance:

COUNTY shall notify CONTRACTOR in writing within thirty (30) days after discovering any defects in CONTRACTOR's performance. CONTRACTOR shall promptly take action to correct the problem and to prevent its recurrence. Such corrective action shall be completed and a written report made to the COUNTY concerning such action not later than thirty (30) days after the date of the COUNTY's written notice to CONTRACTOR.

2.04 Termination for Cause:

Notwithstanding Section 7.02 of the Agreement, if the corrective actions required above are not completed and the report to the COUNTY not made within thirty (30) days, the COUNTY may terminate this Agreement by giving five (5) days' written notice to CONTRACTOR.

2.05 Remedies for Inadequate Service Levels:

- a) For each month that service falls below 80% of the contracted level, CONTRACTOR shall submit to the COUNTY an analysis of the causes of the problem and any necessary actions to be taken to correct the problem. If the problem continues for another month, the COUNTY shall meet with CONTRACTOR to explore the problem and develop an appropriate written corrective action plan with appropriate time frames.

EXHIBIT B

- b) If CONTRACTOR does not carry out the required corrective action within the time frame specified, sanctions shall be applied in accordance with funding source regulations.
- c) Notwithstanding Section 7.02 of the Agreement, if, after the COUNTY notifies CONTRACTOR of any sanctions to be imposed, CONTRACTOR continues in its failure to take corrective action, then COUNTY may terminate this contract by giving CONTRACTOR five (5) days' written notice.
- d) If all appropriate corrective actions are taken but service still falls 80% or more below contracted level, COUNTY and CONTRACTOR may renegotiate the contracted level of service.

2.06 Training for Staff:

CONTRACTOR shall insure that sufficient training is provided to its volunteer and paid staff to enable them to perform effectively on the project, and to increase their existing level of skills. Additionally, CONTRACTOR shall ensure that all staff completes Division 21 Civil Rights training.

2.07 Bi-lingual Services:

CONTRACTOR shall ensure that qualified staff is available to accommodate non-English speaking, and limited English proficient, individuals.

2.08 Assurance of Drug Free-Workplace:

CONTRACTOR shall submit to the COUNTY evidence of compliance with the California Drug-Free Workplace Act of 1990, Government Code sections 8350 et seq., by doing the following:

- Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited in the person's or organization's workplace and specifying the actions that will be taken against employees for violations of the prohibition;
- Establishing a drug-free awareness program to inform employees about all of the following:
 - 1) the dangers of drug abuse in the workplace;
 - 2) the organization's policy of maintaining a drug-free workplace;
 - 3) any available drug counseling, rehabilitation, and employee assistance programs;
 - 4) the penalties that may be imposed upon employees for drug abuse violations;
 - 5) requiring that each employee engaged in the performance of the contract or grant be given a copy of the company's drug-free policy statement and that, as a condition of employment on the contract or grant, the employee agrees to abide by the terms of the statement.

III. CONFIDENTIALITY

CONTRACTOR and its officers, employees, agents, and subcontractors shall comply with Welfare and Institutions (W & I) Code Sec. 10850, 45 CFR Sec. 205.50, and all other applicable provisions of law which provide for the confidentiality of records and prohibit their being opened for examination for any purpose not directly connected with the administration of

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public social services. Whether or not covered by W&I Code Sec. 10850 or by 45 CFR Sec. 205.50, confidential medical or personnel records and the identities of clients and complainants shall not be disclosed unless there is proper consent to such disclosure or a court order requiring disclosure. Confidential information gained by CONTRACTOR from access to any such records, and from contact with its clients and complainants, shall be used by CONTRACTOR only in connection with its conduct of the program under this Agreement. The COUNTY, through the Director of the Department of Social Services, and his/her representatives, shall have access to such confidential information and records to the extent allowed by law, and such information and records in the hands of the COUNTY shall remain confidential and may be disclosed only as permitted by law.

IV. NON-DISCRIMINATION

CONTRACTOR certifies that to the best of its ability and knowledge it will comply with the nondiscrimination program requirements set forth in this Section.

4.01 Discrimination Defined:

The term “discrimination” as used in this contract, is the same term that is used in Monterey County Code, Chapter 2.80 “Procedures for Investigation and Resolution of Discrimination Complaints”; it means the illegal denial of equal employment opportunity, harassment (including sexual harassment and violent harassment), disparate treatment, favoritism, subjection to unfair or unequal working conditions, and/or other discriminatory practice by any County of Monterey official, employee or agent, due to an individual’s race, color, ethnic group, national origin, ancestry, religious creed, sex, sexual orientation, age, veteran’s status, cancer-related medical condition, physical handicap (including AIDS) or disability. The term also includes any act of retaliation.

4.02 Application of Monterey COUNTY Code Chapter 2.80:

The provisions of Monterey COUNTY Code Chapter 2.80 apply to activities conducted pursuant to this Agreement. Complaints of discrimination made by CONTRACTOR against the COUNTY, or by recipients of services against CONTRACTOR, may be pursued using the procedures established by Chapter 2.80. CONTRACTOR shall establish and follow its own written procedures for the prompt and fair resolution of discrimination complaints made against CONTRACTOR by its own employees and agents, and shall provide a copy of such procedures to COUNTY on demand by COUNTY.

4.03 Compliance With Laws:

During the performance of this Agreement, CONTRACTOR shall comply with all applicable federal, state and local laws and regulations which prohibit discrimination, including but not limited to the following:

- **California Fair Employment and Housing Act**, California Government Code Sec. 12900 et seq., see especially Section 12940 (c), (h), (1), (i), and (j); and the administrative regulations issued thereunder, 2 Calif. Code of Regulations Secs. 7285.0 et seq. (Division 4 - Fair Employment and Housing Commission);

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- **California Government Code Secs. 11135 - 11139.5**, as amended (Title 2, Div. 3, Part 1, Chap. 1, Art. 9.5) and any applicable administrative rules and regulations issued under these sections; including **Title 22 California Code of Regulations 98000-98413**.
- **Federal Civil Rights Acts of 1964 and 1991** (see especially Title VI, 42 USC Secs. 2000d et seq.), as amended, and all administrative rules and regulations issued thereunder (see especially 45 CFR Part 80);
- **The Rehabilitation Act of 1973**, Secs. 503 and 504 (29 USC Sec. 793 and 794), as amended; all requirements imposed by the applicable HHS regulations (45 CFR Parts 80, 84 and 91); and all guidelines and interpretations issued pursuant thereto;
- **7 Code of Federal Regulations (CFR)**, Part 15 and **28 CFR** Part 42;
- **Title II of the Americans with Disabilities Act of 1990** (P.L. 101-336), 42 U.S.C. Secs. 12101 et seq. and 47 U.S.C. Secs. 225 and 611, and any federal regulations issued pursuant thereto (see 24 CFR Chapter 1; 28 CFR Parts 35 and 36; 29 CFR Parts 1602, 1627, and 1630; and 36 CFR Part 1191);
- **Unruh Civil Rights Act**, Calif. Civil Code Sec. 51 et seq., as amended;
- **Monterey COUNTY Code**, Chap. 2.80.;
- **Age Discrimination in Employment Act 1975**, as amended (**ADEA**), 29 U.S.C. Secs 621 et seq.;
- **Equal Pay Act of 1963**, 29 U.S.C. Sec. 206(d);
- **California Equal Pay Act**, Labor Code Sec.1197.5.
- **California Government Code** Section 4450;
- **The Dymally-Alatorre Bilingual Services Act; Calif. Government Code Sec. 7290 et seq.**
- **The Food Stamp Act of 1977**, as amended and in particular **Section 272.6**.
- **California Code of Regulations, Title 24, Section 3105A(e)**
- **Removal of Barriers to Inter-Ethnic Adoption Act of 1996, Section 1808**

4.04 Written Assurances:

Upon request by COUNTY, CONTRACTOR will give any written assurances of compliance with the Civil Rights Acts of 1964 and 1991, the Rehabilitation Act of 1973 and/or the

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Americans with Disabilities Act of 1990, as may be required by the federal government in connection with this Agreement, pursuant to 45 CFR Sec. 80.4 or 45 CFR Sec. 84.5, and 91; 7 CFR Part 15; and 28 CFR Part 35, or other applicable State or federal regulation.

4.05 Written Non-discrimination Policy:

Contractor shall maintain a written statement of its non-discrimination policies which shall be consistent with the terms of this Agreement. Such statement shall be available to employees, recipients of services, and members of the public, upon request.

4.06 Grievance Information:

CONTRACTOR shall advise applicants who are denied CONTRACTOR's services, and recipients who do receive services, of their right to present grievances, and of their right to a State hearing concerning services received under this Agreement.

4.07 Notice to Labor Unions:

CONTRACTOR shall give written notice of its obligations under paragraphs 4.01 - 4.08 to labor organizations with which it has a collective bargaining or other agreement.

4.08 Access to Records by Government Agencies:

CONTRACTOR shall permit access by COUNTY and by representatives of the State Department of Fair Employment and Housing, and any state agency providing funds for this Agreement, upon reasonable notice at any time during normal business hours, but in no case less than 24 hours' notice, to such of its books, records, accounts, facilities, and other sources of information as the inspecting party may deem appropriate to ascertain compliance with these non-discrimination provisions.

4.09 Binding on Subcontractors:

The provisions of paragraphs 4.01 - 4.08 shall also apply to all of CONTRACTOR's subcontractors. CONTRACTOR shall include the non-discrimination and compliance provisions of these paragraphs in all subcontracts to perform work or provide services under this Agreement.

V. ADDITIONAL REQUIREMENTS

5.01 Covenant Against Contingent Fees:

CONTRACTOR warrants that no person or selling agency has been employed or retained to solicit this Agreement. There has been no agreement to make commission payments in order to obtain this Agreement. For breach or violation of this warranty, COUNTY shall have the right to terminate this Agreement without liability or, at its discretion, to deduct from the Agreement price or consideration, or otherwise recover, the full amount of such commission, percentage, brokerage, or contingency fee.

5.02 Debarment, Suspension and Fraud, and Abuse:

CONTRACTOR certifies to the best of its knowledge and belief, that it and any subcontractors:

- a) Are not presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from covered transactions by any federal or State department or agency.

EXHIBIT B

- b) Have not, within a three-year period preceding this Agreement, been convicted of, or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, State, or local) transaction or contract under a public transaction; violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.
- c) Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity (federal, State, or local) with commission of any of the offenses in 5.02(b).
- d) Have not, within a three-year period preceding this Agreement, had one or more public transactions (federal, State, or local) terminated for cause or default.

CONTRACTOR shall report immediately to COUNTY in writing, any incidents of alleged fraud and/or abuse by either CONTRACTOR or its subcontractors.

CONTRACTOR shall maintain any records, documents, or other evidence of fraud and abuse until otherwise notified by COUNTY.

CONTRACTOR agrees to timely execute any and all amendments to this Agreement or other required documentation relating to the debarment/suspension status of any subcontractors.

VI. CONTRACT ADMINISTRATORS**6.01 Contract Administrator – CONTRACTOR:**

CONTRACTOR hereby designates **Philip Geiger** as its Contract Administrator for this Agreement. All matters concerning this Agreement which are within the responsibility of CONTRACTOR shall be under the direction of, or shall be submitted to, the CONTRACTOR's Contract Administrator. CONTRACTOR may, in its sole discretion, change its designation of the Contract Administrator, and shall promptly give written notice to COUNTY of any such change.

6.02 Contract Administrator – COUNTY:

COUNTY hereby designates the Director of the County of Monterey Department of Social Services as its Contract Administrator for this Agreement. All matters concerning this Agreement which are within the responsibility of COUNTY shall be under the direction of, or shall be submitted to, the Director or such other COUNTY employee in the Department of Social Services as the Director may appoint. COUNTY may, in its sole discretion, change its designation of the Contract Administrator, and shall promptly give written notice to CONTRACTOR of any such change.

VII. CONTRACT DEPENDENT ON GOVERNMENT FUNDING

COUNTY's payments to CONTRACTOR under this Agreement are funded by the State and Federal governments. If funds from State and Federal sources are not obtained and continued at a level sufficient to allow for COUNTY's purchase of the indicated quantity of services, then COUNTY may give written notice of this fact to CONTRACTOR, and the obligations of the parties under this Agreement shall terminate immediately, or on such date thereafter, as

EXHIBIT B

COUNTY may specify in its notice, unless in the meanwhile the parties enter into a written Amendment modifying this Agreement.

VIII. APPEAL PROCESS

In the event of a dispute or grievance regarding the terms and conditions of this Agreement, both parties shall abide by the following procedures:

- a) CONTRACTOR shall first discuss the problem informally with the designated DSS Contact/Program Analyst. If the problem is not resolved, CONTRACTOR must, within fifteen (15) working days of the failed attempt to resolve the dispute with DSS Contact/Program Analyst, submit a written complaint, together with any evidence, to the DSS Branch Deputy Director. The complaint must include a description of the disputed issues, the legal authority/basis for each issue which supports CONTRACTOR's position, and the remedy sought. The Branch Deputy Director shall, within fifteen (15) working days after receipt of CONTRACTOR's written complaint, make a determination on the dispute, and issue a written decision and reasons therefore. All written communication shall be pursuant to Section 14. NOTICES of this Agreement. Should CONTRACTOR disagree with the decision of the Division Deputy Director, CONTRACTOR may appeal the decision to the Director of the Department of Social Services.
- b) CONTRACTOR's appeal of the Branch Deputy Director's decision must be submitted to the Department Director within ten (10) working days from the date of the decision; be in writing, state the reasons why the decision is unacceptable, and include the original complaint, the decision that is the subject of appeal, and all supporting documents. Within twenty (20) working days from the date of CONTRACTOR'S appeal, the Department Director, or his/her designee, shall meet with CONTRACTOR to review the issues raised on appeal. The Department Director shall issue a final written decision within fifteen (15) working days of such meeting.
- c) CONTRACTOR may appeal the final decision of the Department Director in accordance with the procedures set forth in Division 25.1 (commencing with Section 38050) of the Health and Safety Code and the regulations adopted thereunder. (Title 1, Subchapter 2.5 commencing with Section 251, or Subchapter 3 commencing with Section 300, whichever is applicable, of the California Code of Regulations).
- d) CONTRACTOR shall continue to carry out the obligations under this Agreement during any dispute.
- e) Costs incurred by CONTRACTOR for administrative/court review are not reimbursable by COUNTY.

**MONTEREY COUNTY AREA AGENCY ON AGING
PLANNING AND SERVICE AREA NO. 32**

FAMILY CAREGIVER SUPPORT BUDGET

BUDGET PERIOD: SEPTEMBER 1, 2026 - JUNE 30, 2027

Name of Agency: Alzheimer's Disease and Related Disorders Association, Inc.

Address of Agency: 2 Lower Ragsdale, Suite 150

Monterey, CA 93940

Project Name: Family Caregiver Support

Federal Funding Source and Federal Catalog #

Title III E

X	93.052
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Budget Version

Check one:

Original	X	04.24.26
Revision		

Certification:

I hereby certify to the best of my knowledge and belief that the Budget reflects the necessary, reasonable and allowable costs to attain the objectives and goals of this project. I further certify that the amounts displayed are accurate and correct.

Preparer's Signature / Date

Uma Vishwanath, 408-372-9915

Preparer's Name (Printed) and telephone number

Executive Director's Signature / Date

Ken Toren, 408-372-9900

Executive Director's Name (Printed) and telephone number

For Area Agency on Aging Use Only

Reviewed for:

Completeness and Accuracy

Reviewed for Allowable Costs

Indirect Cost limit 10%

Required Match of 25%

Date Budget Received: _____

Budget Approved by Fiscal Officer: Araceli Madrid

Budget Approved by Program: Thom DLC 06.04.2026

Get-Care Updated by Vendor: _____

Get-Care Verified by Fiscal Officer: _____

Budget Template Last Updated: Araceli Madrid 3/26/2025

SECTION B:**SCHEDULE OF DIRECT CAREGIVER SUPPORT SERVICES (III E)**

BUDGET PERIOD								DATE:		04.24.26
SERVICE CATEGORIES		(a) Total Budgeted Costs	(b) Program Income	Non-Matching Contributions		(e) State Funds	Matching Contributions		(h) Federal Share	
				(c) Cash	(d) In-Kind		(f) Cash	(g) In-Kind		
Public Information	-							-	-	
Community Education	56,713						2,369	14,178	40,166	
Total Information Services	56,713	-	-	-			2,369	14,178	40,166	
Outreach	-							-	-	
Information & Assistance	21,473							5,369	16,104	
Interpretation/Translation	-							-	-	
Legal Resources	-							-	-	
Total Access Assistance Services	21,473	-	-	-			-	5,369	16,104	
Caregiver Assessment	-							-	-	
Caregiver Counseling	25,000							6,250	18,750	
Caregiver Peer Counseling	-							-	-	
Caregiver Support Group	16,333							4,083	12,250	
Caregiver Training	-							-	-	
Caregiver Case Management	-							-	-	
Total Support Services	41,333	-	-	-			-	10,333	31,000	
In-Home Supervision	-							-	-	
Homemaker Assistance	-							-	-	
In-Home Personal Care	-							-	-	
Home Chore	-							-	-	
Out-of-Home Day Care	-							-	-	
Out-of-Home Overnight Care	-							-	-	
Total Respite Care Services	-	-	-	-			-	-	-	
Assistive Devices	-							-	-	
Home Adaptations	-							-	-	
Caregiving Services Registry	-							-	-	
Emergency Cash/Material Aid	-							-	-	
Total Supplemental Services	-	-	-	-			-	-	-	
TOTAL III E DIRECT SERVICES	119,519	-	-	-			2,369	29,880	87,270	

SCHEDULE OF PERSONNEL COSTS

***Round all figures**

	Total Personnel Costs			\$104,473.00
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Page 4 of 12

SECTION D:

SEPTEMBER 1, 2026 - JUNE 30, 2027

Funding Source Summary

Category	(1) Service Information		(2) Access		(3) Caregiver Support		(4) Respite		(5) Supplemental Services		Total Title III-E Budget	
	Cash	In/Kind	Cash	In/Kind	Cash	In/Kind	Cash	In/Kind	Cash	In/Kind	Cash	In/Kind
Grant Related Income, Section E	-		-		-		-		-		-	
Contributions (+)												
Non-Matching, Section F	-	-	-	-	-	-	-	-	-	-	-	-
Contributions (+)												
Matching, Section G	2,369	14,178	-	5,369	-	10,333	-	-	-	-	2,369	29,880
AAA Grant Funds	40,166		16,104		31,000		-		-		87,270	
Total Funding	42,535	14,178	16,104	5,369	31,000	10,333	-	-	-	-	89,639	29,880

*Round all figures

SECTION E:

Program Income Definition: Program Income is defined as earnings by a service provider realized from grant supported activities.

Schedule of Program Income

Source	Amount
Total:	\$0.00

- A. The following types of income comprise "Program Income."
1. Participant donations from persons who participate or benefit from such activities.
 2. Usage or rental fees.
 3. Sales of assets purchased with grant funds.
 4. Royalties, patents, and copyrights.
- B. Not to be included are:
1. Revenues from non-activity related fundraisers.
 2. Gifts from philanthropic organizations or individuals.
 3. Rebates, discounts, and recoveries on losses which should be treated as "applicable credits."

SECTION F:**Schedule of Contributions - Non Matching**

Source of Contributions	Cash	In-Kind	Total
Donations and Contributions			\$ -
Foundations & Organizations			\$ -
Government Agencies:			\$ -
Government Agencies:			\$ -
Government Agencies:			\$ -
Government Agencies:			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
Totals:	-	-	\$ -

Note: Under "**Government Agencies**" please list the agency providing funding and what type of funds were received. (i.e. Government Agencies: City of Seaside, CDBG; list amount in "Cash")

Cash total should not include Federal Older American's Act Funds. Total of both Cash and In-Kind funds should equal Section D & E.

SECTION G:**Schedule of Contributions - Matching**

Source of Contributions	Cash	In-Kind	Total
Donations and Contributions	2,369	29,880	\$ 32,249
Foundations and Organizations			\$ -
Government Agencies:			\$ -
Government Agencies:			\$ -
Government Agencies:			\$ -
Government Agencies:			\$ -
			\$ -
			\$ -
			\$ -
			\$ -
Totals:	2,369	29,880	\$ 32,249

Total of Cash and In-Kind funds should equal Section D & E.

Program income cannot count toward satisfying a cost-sharing or matching requirement of the Title III E sub-grant, supporting the activity giving rise to the income.

There is a 25% minimum matching requirement on Title III E funds. To compute amount of match required: take the **Total Funding less Program Income, less non-matching funds** and multiply by the minimum % matching requirement above.

Match may be met by Cash or In-Kind contributions. See related California Department of Aging matching guidelines.

Match Req. %	GR total	Cash non-match	IK non-match	AAA Claim	Program Income	Cash Match	IK Match	Req. Match
<u>Family Caregiver Support</u>								
Original Amount	119,519	0	0	87,270	0	2,369	29,880	29,880
Fund Increase		0	0		0	0	0	0
25.00%	119,519	0	0	87,270	0	2,369	29,880	29,880
								Difference
Required Match (Original)	119,519	0	0	87,270	0	2,369	29,880	match OK
Required Match (Amended)	119,519	0	0	87,270	0	2,369	29,880	match OK

SECTION A

Project:	Family Caregiver Support
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Category	Information Services									(6) Total Title III-E Budget		
	Public Information		Community Education									
	Cash	In/Kind	Cash	In/Kind							Cash	In/Kind
Salaries/Vol IK			29,745	8,526							29,745	8,526
Payroll Taxes- ERE											-	-
Employee Benefits- ERE			8,923	2,380							8,923	2,380
SUBTOTAL:	-	-	38,668	10,906	-	-	-	-	-	-	38,668	10,906
*Travel											-	-
Training											-	-
Space											-	-
Food/Food Service											-	-
Client Support											-	-
Equipment											-	-
Materials and Supplies											-	-
Operating Services											-	-
Overhead: 10% limit of Grant Funding			3,867	3,272							3,867	3,272
Indirect Costs											-	-
											-	-
											-	-
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*Eligible expenses shall be reimbursed per the County's Travel and Business Expense Reimbursement Policy available at: <http://www.co.monterey.ca.us/auditor/policies.htm> CONTRACTOR must provide a detailed breakdown of authorized expenses.

SECTION A

Project:	Family Caregiver Support
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[illegible]

*Eligible expenses shall be reimbursed per the County's Travel and Business Expense Reimbursement Policy available at: <http://www.co.monterey.ca.us/auditor/policies.htm> CONTRACTOR must provide a detailed breakdown of authorized expenses.

Project:	Family Caregiver Support
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Category	Support Services												(6) Total Title III-E Budget	
	Assessment		Counseling		Peer Counseling		Support Group		Training		Case Management		Cash	In/Kind
	Cash	In/Kind	Cash	In/Kind	Cash	In/Kind	Cash	In/Kind	Cash	In/Kind	Cash	In/Kind		
Salaries/Vol IK			13,112	3,740			8,566	2,416					21,678	6,156
Payroll Taxes- ERE													-	-
Employee Benefits- ERE			3,933	1,068			2,570	725					6,503	1,793
SUBTOTAL:	-	-	17,045	4,808	-	-	11,136	3,141	-	-	-	-	28,181	7,949
*Travel													-	-
Training													-	-
Space													-	-
Food/Food Service													-	-
Client Support													-	-
Equipment													-	-
Materials and Supplies													-	-
Operating Services													-	-
Overhead: 10% limit of Grant Funding			1,705	1,442			1,114	942					2,819	2,384
Indirect Costs													-	-
													-	-
													-	-
													-	-
													-	-
													-	-
													-	-
													-	-
													-	-
Total Project Costs	-	-	18,750	6,250	-	-	12,250	4,083	-	-	-	-	31,000	10,333

SECTION A

Project:	Family Caregiver Support
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[illegible]

**Eligible expenses shall be reimbursed per the County's Travel and Business Expense Reimbursement Policy available at: <http://www.co.monterey.ca.us/auditor/policies.htm> CONTRACTOR must provide a detailed breakdown of authorized expenses.*

SECTION A

Project:	Family Caregiver Support
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[illegible]

*Eligible expenses shall be reimbursed per the County's Travel and Business Expense Reimbursement Policy available at: <http://www.co.monterey.ca.us/auditor/policies.htm> CONTRACTOR must provide a detailed breakdown of authorized expenses.

SAMPLE GetCare Service Invoice Summary
Area Agency on Aging (PSA32) – Program 123

Invoice: I0000001234 Status: Submitted Invoice Type: Original Date Created: 08/10/2025 Total Requested: \$000
Contract: Name of Agency BFY: 2026-27 Service Delivery: 07/01/2026 Last Modified: 07/01/2026 Verified Amount: 0.00
Controlling Agency: Area Agency on Aging (Monterey County DSS) Service Delivery End: 07/31/2026 Last Submit Date: 08/10/2026

Invoice Details					
Invoice Detail Number	Comment	Type	Requested Amount	AAA Invoice Total	Status
I0000001234		Budget	\$000	\$000	Approved

Dates: 07/01/2026 To: 07/31/2026
Service: Name of Service
Subcontractor/Provider: Name Address: Address

Total Amount						
	Budgeted Cash	Budgeted In-Kind	Cash	In-Kind	Remaining Cash	Remaining In-Kind
Personnel	0.00	0.00	0.00	0.00	0.00	0.00
ERE (Employee Related Expense)	0.00	0.00	0.00	0.00	0.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00
Space	0.00	0.00	0.00	0.00	0.00	0.00
Food	0.00	0.00	0.00	0.00	0.00	0.00
Client Support	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	0.00	0.00	0.00	0.00	0.00
One Time	0.00	0.00	0.00	0.00	0.00	0.00
Ongoing	0.00	0.00	0.00	0.00	0.00	0.00
Materials and Supplies	0.00	0.00	0.00	0.00	0.00	0.00
Operating Services	0.00	0.00	0.00	0.00	0.00	0.00
Indirect Costs	0.00	0.00	0.00	0.00	0.00	0.00
Sub-total	0.00	0.00	0.00	0.00	0.00	0.00
Total	0.00	0.00	0.00	0.00	0.00	0.00

Program Items			
	Budgeted	Request Amount	Remaining
AAA Grant	0.00	0.00	0.00
OTO Grant	0.00	0.00	0.00
NSIP Grant	0.00	0.00	0.00
Other	0.00	0.00	0.00
Requested Amount Total	0.00	0.00	0.00
Requested Amount	0.00		
AAA Invoice Total	0.00		
	Budgeted Units	Remaining Units	Registered Units
	0.00	0.00	0.00

Matches and Income:

	Budgeted Cash	Budgeted In-Kind	Cash	In-Kind	Remaining Cash	Remaining In-Kind
Project Income		0.00		0.00		0.00
Non-Match	0.00	0.00	0.00	0.00	0.00	0.00
Match	0.00	0.00	0.00	0.00	0.00	0.00
Total Match		0.00		0.00		0.00
Required Match		0.00		0.00		0.00

Author Date Created Comments

Provider Annual Closeout Summary

Parameters	
Date:	07/01/2026 TO 06/30/2027
Region:	Area Agency on Aging (Monterey County DSS)
Provider:	All
Service: All	
Contract Number: All	
Program: All	
Service Detail:	

Name of Program and Service Units

Description	FY Total	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Personnel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
ERE	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Travel	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Space	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Food	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Client Support	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Equipment	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
One Time	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Ongoing	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Materials and Supplies	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Operating Services	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Indirect Costs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Pro and Outside Svcs	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Direct	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Total Expenses	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0

	Project Income	NSIP Grant	AAA Grant	Non-Match Cash	Non-Match In Kind	Match Cash	Match In Kind	Required Match
FY to Date	\$ 0	\$ 0	\$ 00,000	\$ 0	\$ 0	\$ 00,000	\$ 00,000	\$ 00,000
Budget	\$ 0	\$ 0	\$ 00,000	\$ 0	\$ 0	\$ 00,000	\$ 00,000	\$ 00,000

I certify to the best of my knowledge and belief that the attached financial closeout report is accurate, current, and discloses the financial results of this program funded by Monterey County Area Agency on Aging with Older Americans Act Title III/VII, Title III/E and/or State General Funds.			
Signature (Name/Title)		Date	
AAA Fiscal Officer			
Fed Fund Source		State Fund Source	
		Approved by	
		Date	

EQUIPMENT ACQUISITION REPORT
COUNTY OF MONTEREY AREA AGENCY on AGING, PSA 32

Reporting Agency: _____ Month Reported: _____
Name of Project: _____ Date Submitted: _____

Purchased or Received equipment using the following income sources:

_____ Grant Funds _____ Program Income _____ Cash Match _____ Cash Non-Match _____ In-Kind Match _____ In-Kind Non-Match _____

If purchased with Grant Funding, list type of funding: _____

Make	Model	Description	Serial Number	Purchase Date	Cost	New /Used	Location	For AAA Use: Inventory No.

Notes:

Preparer's Name :

Date Entered in AAA Database: _____

Preparer's Signature: _____

EQUIPMENT PURCHASES

- A. Unless otherwise provided for in this Article, property refers to all assets used in operation of this Agreement.
1. Property includes land, buildings, improvements, machinery, vehicles, furniture, tools, and intangibles, etc.
 2. Property does not include consumable office supplies such as paper, pencils, toner cartridges, file folders, etc.
- B. Property meeting all of the following criteria are subject to the reporting requirements:
1. Has a normal useful life of at least 1 year and has a unit acquisition cost of at least \$5,000 (a desktop or laptop setup, is considered a unit, if purchased as a unit)
 2. All computing devices, regardless of cost (including but not limited to workstations, servers, laptops, personal digital assistants, notebook computers, tablets, smartphones and cellphones).
 3. All Portable electronic storage media, regardless of cost (including but not limited to, thumb/flash drives and portable hard drives).
- C. Intangibles are property which lack physical substance but give valuable rights to the owner. Examples of intangible property include patents, copyrights, leases, and computer software. By contrast, hardware consists of tangible equipment (e.g., computer printer, terminal, etc.).
- Costs include all amounts incurred to acquire and to ready the intangible asset for its intended use. Typical intangible property costs include the purchase price, legal fees, and other costs incurred to obtain title to the asset.
- D. The Contractor shall submit the *Equipment Acquisition Report*, Exhibit D-3, with the Contractor's invoice to the County as appropriate. Equipment must be received by June 30 for expenses to be claimed against this agreement. Any equipment or physical assets obtained by Contractor utilizing funds pursuant to the terms of this Agreement shall be inventoried and considered the property of the County, and tendered to the County upon termination of services by Contractor.
- E. The Contractor shall keep track of property purchased with *AAA or Matching funds*, and submit to the County annually with the Closeout, a cumulative inventory of all property furnished or purchased by the Contractor with funds awarded under the terms of this Agreement or any predecessor agreement for the same purpose.
- F. Disposal of Property
1. Prior to disposal of any property purchased by the Contractor with funds from this Agreement or any predecessor Agreement, the Contractor must obtain

EXHIBIT D-4

approval from the County. Disposition, which includes sale, trade-in, discarding, or transfer to another agency may not occur until approval is received from the County. The Contractor shall e-mail to the County a request to dispose of equipment and a list of item(s). Once approval for disposal has been received from CDA, the County will notify the Contractor and the item(s) shall be removed from the Contractor's inventory report.

2. Contractor must remove all confidential, sensitive, or personal information from CDA property prior to disposal, including removal or destruction of data on computing devices with digital memory and storage capacity. This includes, but is not limited to magnetic tapes, flash drives, personal computers, personal digital assistants, cell or smart phones, multifunction printers, and laptops.
- G. The Contractor shall investigate, the loss, damage, or theft of equipment, fully document and shall promptly notify the County.
- H. The State reserves title to all State-purchased or financed property not fully consumed in the performance of this Agreement, unless otherwise required by federal law or regulations or as otherwise agreed by the parties.
- I. The Contractor shall exercise due care in the use, maintenance, protection, and preservation of such property during the period of the project, and shall assume responsibility for replacement or repair of such property during the period of the project, or until the Contractor has complied with all written instructions from the County regarding the final disposition of the property.
- J. In the event of the Contractor's dissolution or upon termination of this Agreement, the Contractor shall provide a final property inventory to the County. The County reserves the right to require the Contractor to transfer such property to another entity, or to the State.
- K. The Contractor shall use the property for the purpose for which it was intended under the Agreement. When no longer needed for that use, the Contractor shall use it, if needed, and with written approval of the County for other purposes in this order:
1. For another CDA program providing the same or similar service
 2. For another CDA-funded program
- L. The Contractor may share use of the property and equipment or allow use by other programs, upon written approval of the County. As a condition of the approval, the County may require reimbursement under this Agreement for its use.
- M. The Contractor shall not use equipment or supplies acquired under this Agreement with federal and/or State monies for personal gain or to usurp the competitive advantage of a privately-owned business entity.
- N. If purchase of equipment is a reimbursable item, the equipment to be purchased will be specified in the budget.

Subcontractor	Item Description	Model	Serial #	Purchase Date	Purchase Price	CDA Tag #	AAA Funding Used	Dispose Status	Notes
Alzheimer's Association	LG Wall Mounted Flat Screen TV	LCD Flat Screen	110RMGCEN855	3/29/2012	\$1,082.49	20235	3E		
Alzheimer's Association	Mobile 2-Door Storage Cabinet	Sandusky		12/11/2015	\$669.29	22447	3E		
Alzheimer's Association	440 G5 Laptop	HP ProDesk	5CD9172WGB	5/23/2019	\$954.00	22459	3E		

Authorized Signature	Print Name and Title Date

Quarterly Narrative Report

Name of Agency:		Date:	
Completed by:		Program:	

Quarter:

☐ Jul – Sep 2026 ☐ Oct – Dec 2026 ☐ Jan – Mar 2027 ☐ Apr – Jun 2027

Narrative summary of program highlights (briefly summarize):

1. Program achievements & accomplishments:

2. Program challenges and barriers impacting service delivery:

3. Technical support interests and requests

4. Please give examples of success stories and customer testimonials (with name and city of residence), and photos if available with media release form.

CERTIFICATION REGARDING LOBBYING

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award document for sub-awards at all tiers (including sub-contracts, sub-grants, and contracts under grants, loans, and cooperative agreements, and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Signed by: <i>Morablasing Dzivakwe</i> 1874B0863D2849C... Signature	<u>VP, Sponsored Programs</u> Title
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Alzheimer's Disease & Related Disorders <u>Association Inc.</u> Agency/Organization	<u>7/29/2026 1:00 PM PDT</u> Date
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EXHIBIT F**AUDIT & RECOVERY OF OVERPAYMENTS REQUIREMENTS****I. CPA Audit on Termination****1.01 Audit Requirement**

At the request of COUNTY, CONTRACTOR shall give to COUNTY an audit report(s) covering the contract period, prepared by an independent Certified Public Accountant. The purpose of the audit requirement is determining whether the reported costs are fair and reasonable and have been computed in accordance with generally accepted accounting principles, with the provisions of this Agreement, and with all applicable COUNTY requirements. The audit must identify all federal, state, and matching funds issued under this Agreement as a note, or as a supplemental schedule of expenses within Contractor's audits.

If CONTRACTOR expends a total of \$750,000 or more of federal funding per fiscal year, CONTRACTOR is required to submit an annual audit report(s) that was performed in compliance with the Uniform Guidance.

If CONTRACTOR expends less than \$750,000 in federal funding per fiscal year, then the COUNTY shall require an annual audit report(s) be performed in accordance with the Generally Accepted Auditing Standards (GAAS).

1.02 Audit Submission /Fiscal Year-end

CONTRACTOR shall provide COUNTY with the audit report(s), required herein no later than six (6) months after the close of CONTRACTOR's Fiscal Year, except when CONTRACTOR has expended \$750,000 in federal funding and the Uniform Guidance allows a nine (9) month deadline. In the case where providing the required audit within the specified time period represents an unreasonable hardship, CONTRACTOR shall alert COUNTY and request an extension. Additional documentation may be requested by COUNTY to grant the extension. CONTRACTOR shall submit their audit to 501-DSS-AUDITS@countyofmonterey.gov and to their assigned program contract analyst by the deadline as described in this section.

1.03 Audit Format

CONTRACTOR may submit to COUNTY one of the following in satisfaction of this Audit requirement:

- 1) If CONTRACTOR expends a total of \$750,000 or more of federal funding per fiscal year, CONTRACTOR is required to submit an annual audit report(s) that was performed in compliance with the Uniform Guidance.

-OR-

- 2) If CONTRACTOR expends less than \$750,000 in federal funding per fiscal year, then the COUNTY shall require an annual audit report(s) be performed in accordance with the Generally Accepted Auditing Standards (GAAS).

-OR-

- 3) Additionally, at the discretion of the CONTRACTOR, a program specific audit report(s) may be submitted in accordance with the Uniform Guidance.

All Audits must include the following information within their audit:

- a) A separate schedule listing programs and funding, see recommended format, **Exhibit F-1**.
- b) All Management Letters received by the CONTRACTOR relating to the performed audit, shall be submitted in conjunction with the annual audit report(s) to the COUNTY.

EXHIBIT F**1.04 Payment for Audit**

CONTRACTOR shall bear all costs in connection with, or resulting from, any audit and/or inspections including, but not limited to, actual cost incurred and the payment/repayment of any expenditures disallowed by COUNTY, State or Federal government entities, including any assessed interest and penalties.

If CONTRACTOR is exempt from federal audit procedures under UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS (Uniform Guidance), then payment for this audit shall be made by CONTRACTOR with resources other than grant funds, or those used for matching purposes. If CONTRACTOR is not exempt from federal audit procedures under the UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS (Uniform Guidance), the cost of audits made in accordance with the provisions of this part are allowable charges to Federal awards. The charges may be considered a direct cost or an allocated indirect cost, as determined in accordance with the provisions of applicable Uniform Guidance cost principles, other applicable cost principles or regulations.

II. Contractor Records

Funds provided by COUNTY shall be accounted for separately in CONTRACTOR's books and records. CONTRACTOR shall keep a systematic accounting record of the receipt and disbursement of COUNTY funds. CONTRACTOR shall permit COUNTY to audit, examine and to copy excerpts and transcripts from such records and to conduct audits or reviews of all records including, but not limited to, invoices, materials, personnel records, bank account records, business records, billing statements, payroll records, business expense records, and all other data related to matters covered by this Agreement. CONTRACTOR shall maintain such data and records in an accessible location and condition for a period of at least four (4) years from the close of this Agreement term, or until after the conclusion of any audit, whichever occurs last. The State of California and/or any Federal agency providing funds for this Agreement shall have the same rights conferred upon COUNTY herein. CONTRACTOR shall keep records that are sufficient to permit the tracing of funds to a level of expenditure adequate to ensure that the funds have not been unlawfully spent. CONTRACTOR's records shall describe and support the use of funds for the agreed upon project or services outlined in this Agreement.

III. Recovery of Overpayments

If any audit shows that COUNTY has paid to CONTRACTOR any amount in excess of properly allowable costs, then CONTRACTOR shall reimburse COUNTY for that amount, either by a cash payment made within thirty (30) days after COUNTY notifies CONTRACTOR of the overpayment, or by an offset made by COUNTY against any payments owed by COUNTY to CONTRACTOR under this or any other contract.

Signed by:

Morablaing Dzivakwa

(signature of authorized representative)

7/29/2026 | 1:00 PM PDT

(date)

ALZHEIMER’S DISEASE & RELATED DISORDERS ASSOCIATION
SCHEDULE OF COUNTY PROGRAMS
FISCAL YEARS

Program Name	County Dept.	Contract No.	CFDA #	Contract Period	Contract Amount	Expenditures Fiscal Year	Expenditures Contract Life-to-Date	Amount Received From County Fiscal Year	Amount Received From County Contract Life-to-Date	Federal	Source of Funding for Expenditures Other Funds	Source of Funding for Expenditures Cash Match	Source of Funding for Expenditures In Kind Match	Source of Funding for Expenditures Total
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ELDER/DEPENDENT ADULT ABUSE & NEGLECT REPORTING CERTIFICATION

CONTRACTOR hereby acknowledges that this contract for services will bring CONTRACTOR in contact with dependent adults or elders, and that CONTRACTOR has received from COUNTY a copy of Welfare & Institutions Code Section 15659 as required by the Elder Abuse and Dependent Adult Civil Protection Act (Welfare & Institutions Code Sections 15600, et seq). CONTRACTOR certifies that it has knowledge of the provisions of the Act, and will comply with its provisions which define a mandated reporter, and requires that reports of abuse or neglect be made by a mandated reporter when, in his or her professional capacity, or within the scope of his or her employment, he/she observes or has knowledge of an incident that reasonably appears to be physical abuse, abandonment, isolation, financial abuse, or neglect.

Form SOC 341, Report of Suspected Dependent Adult/Elder Abuse, and General Instructions are available on the California Department of Social Services website: https://cdss.ca.gov/MandatedReporting/story_content/external_files/SOC-341.pdf

CONTRACTOR further gives assurance that all of its employees, consultants, and agents performing services under this Agreement, who are mandated reporters under the Act, sign statements indicating that they know of and will comply with the Act's reporting requirements.

Form SOC 341A, Statement Acknowledging Requirement to Report Suspected Abuse of Dependent Adult and Elders, is available on the California Department of Social Services website: https://cdss.ca.gov/MandatedReporting/story_content/external_files/SOC-341.pdf

Signed by:

1874B0B63D7B49C
Authorized Signature

7/29/2026 | 1:00 PM PDT

Date

To Report Suspected Dependent Adult/Elder Abuse during regular business hours, call
1 (800) 510-2020

To Report Suspected Dependent Adult/Elder Abuse after hours, call **911**

EXHIBIT G

WELFARE AND INSTITUTIONS CODE SECTION 15659

15659.

- (a) Any person who enters into employment on or after January 1, 1995, as a care custodian, health practitioner, or with an adult protective services agency or a local law enforcement agency, prior to commencing his or her employment and as a prerequisite to that employment shall sign a statement on a form, that shall be provided by the prospective employer, to the effect that he or she has knowledge of Section 15630 and will comply with its provisions. The signed statement shall be retained by the employer.
- (b) Agencies or facilities that employ persons required to make reports pursuant to Section 15630, who were employed prior to January 1, 1995, shall inform those persons of their responsibility to make reports by delivering to them a copy of the statement specified in subdivision (a).
- (c) The cost of printing, distribution, and filing of these statements shall be borne by the employer.
- (d) On and after January 1, 1995, when a person is issued a state license or certificate to engage in a profession or occupation the members of which are required to make a report pursuant to Section 15630, the state agency issuing the license or certificate shall send a statement substantially similar to the one contained in subdivision (a) to the person at the same time as it transmits the document indicating licensure or certification to the person.
- (e) As an alternative to the procedure required by subdivision (d), a state agency may cause the required statement to be printed on all application forms for a license or certificate printed on or after January 1, 1995.
- (f) The retention of statements required by subdivision (a), and the delivery of statements required by subdivision (b) shall be the full extent of the employer's duty pursuant to this section. The failure of any employee or other person associated with the employer to report abuse of elders or dependent adults pursuant to Section 15630 or otherwise meet the requirements of this chapter shall be the sole responsibility of that person. The employer or facility shall incur no civil or other liability for the failure of these persons to comply with the requirements of this chapter.

EXHIBIT H

Modifications to Standard Agreement

8.0 INDEMNIFICATION:

Section 8.0 is hereby amended as follows:

CONTRACTOR shall indemnify, defend, and hold harmless the County, its officers, agents, and employees, from and against any and all claims, liabilities, and losses whatsoever (including damages to property and injuries to or death of persons, court costs, and reasonable attorneys' fees) occurring or resulting to any and all persons, firms or corporations furnishing or supplying work, services, materials, or supplies in connection with the performance of this Agreement, and from any and all claims, liabilities, and losses occurring or resulting to any person, firm, or corporation for damage, injury, or death arising out of or connected with the CONTRACTOR's performance of this Agreement, unless, and to the extent, such claims, liabilities, or losses arise out of the negligence or willful misconduct of the County. "CONTRACTOR's performance" includes CONTRACTOR's action or inaction and the action or inaction of CONTRACTOR's officers, employees, agents and subcontractors.

10.01 CONFIDENTIALITY:

Section 10.01 is hereby amended as follows:

CONTRACTOR and its officers, employees, agents, and subcontractors shall comply with any and all applicable federal, state, and local laws, which provide for the confidentiality of records and other information. CONTRACTOR shall not disclose any confidential records or other confidential information received from the County or prepared in connection with the performance of this Agreement, unless County specifically permits CONTRACTOR to disclose such records or information. CONTRACTOR shall promptly transmit to County any and all requests for disclosure of any such confidential records or information. CONTRACTOR shall not use any confidential information gained by CONTRACTOR in the performance of this Agreement except for the sole purpose of carrying out CONTRACTOR's obligations under this Agreement.