



Leadership in Aging and Community Living

**NATIONAL ASSOCIATION OF
AREA AGENCIES ON AGING**

ANNUAL REPORT
2017–2018



advocacy | action | answers on aging

The National Association of Area Agencies on Aging (n4a) is a 501c(3) membership association representing America's national network of 622 Area Agencies on Aging and providing a voice in the nation's capital for the more than 250 Title VI Native American aging programs.

Our Mission

To build the capacity of our members so that they can better help older adults and people with disabilities live with dignity and choices in their homes and communities for as long as possible.

Our Members

By providing a range of options that allow older adults to choose the home and community-based services and living arrangements that best address their individual needs, our members make it possible for older adults to “age in place” in their homes and communities, with dignity, health and independence for as long as possible.

Area Agencies on Aging (AAAs) were established under the Older Americans Act (OAA) in 1973 to respond to the needs of Americans 60 and older in every community in the country.

Title VI, Grants for Indian Tribal Organizations, was added in the 1978 Amendments to the OAA. **Title VI Native American aging programs** provide nutrition, supportive and caregiver services to older American Indians, Alaska Natives and Native Hawaiians.

Learn more at n4a.org.

Leading the Way for an Aging Nation

The maturing of America's baby boomer generation has brought our nation to an unprecedented, long-term shift in our country's age demographics. By 2030, 73 million—or one in five—people in America will be 65 or older.¹

Communities—rural ones in particular—across the country are already seeing the new realities brought about by this historic population shift, with ratios of older adults far exceeding the current national average, and available services unable to keep pace with the growing need. By 2030, *all* communities in the U.S. will face this new reality.

Never before has our nation faced this particular challenge—and opportunity. That's why the work of our members, Area Agencies on Aging and Title VI Native American aging programs around the country, is more important than ever.

To meet the needs of the growing number of older adults, to support healthy aging and independence, to serve an increasingly diverse population, to create livable and dementia-friendly communities, to innovate and create evidence-based solutions to the challenges of aging—that's what our members strive to do every day in communities across the country.

That's why *our* mission is more critical than ever, driven, as always, by what older adults need, what our members can do to meet those needs—and how n4a can help.

Because of what we know, this is what we do.



Because nearly 70 percent of older adults will need an average of three years of long-term services and supports²...

Our members rely upon federal funding as a foundation for the additional state and local resources they leverage to provide the home and community-based services that are preferred by older adults and are more affordable than institutional care,

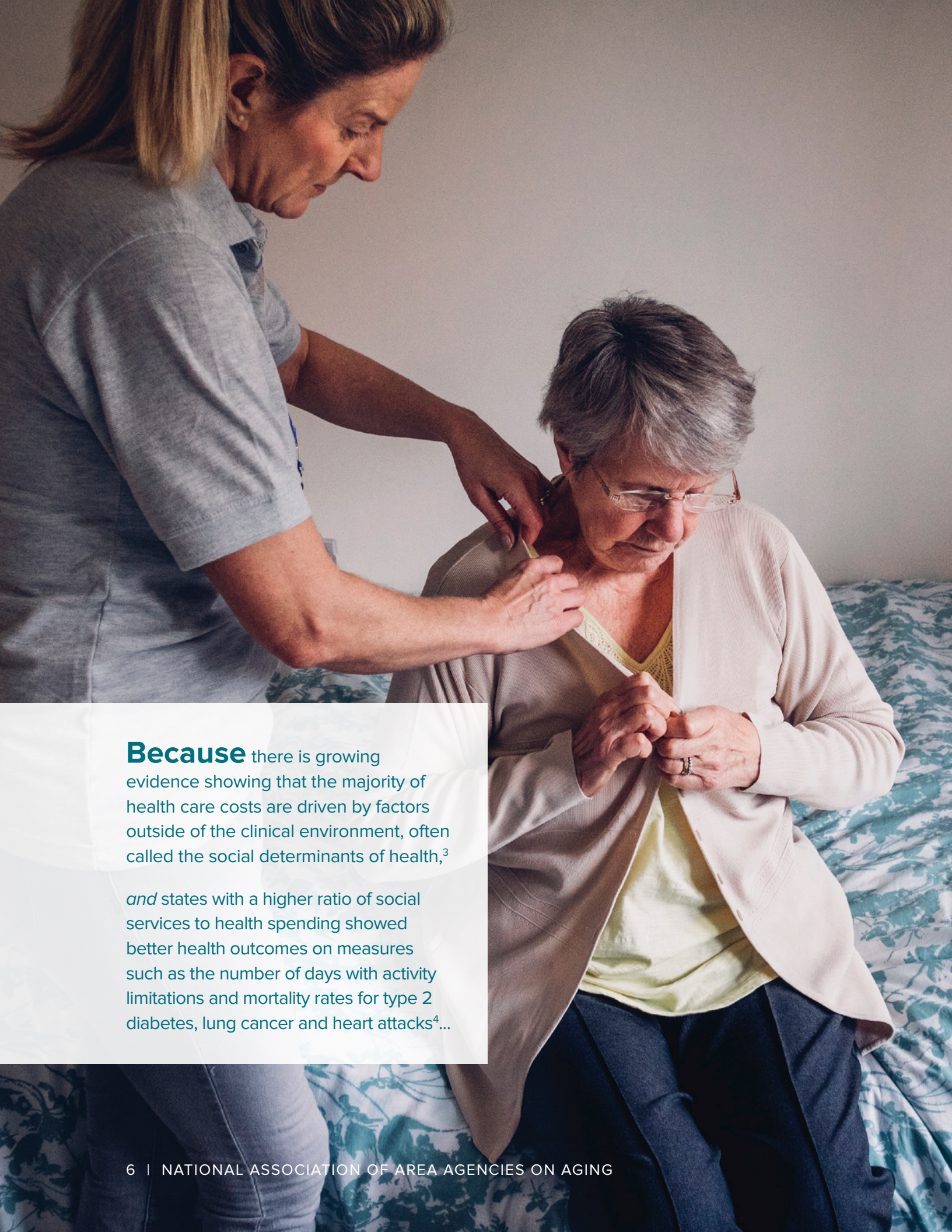
and per the Older Americans Act, AAAs act as advocates for older adults in their planning and service areas, weighing in on policymaking at all levels.

So we advocate on Capitol Hill to effect policy change that supports aging at home and in the community, with maximum health, independence and well-being.




To do this, we educate Members of Congress and their staff on critical aging issues, such as the value of home and community-based services and programs delivered under the Older Americans Act, Medicaid and Medicare. Our policy team supports sound policies on transportation, caregiving, dementia and evidence-based programs to keep older adults healthy, and advances the role of the Aging Network in addressing the social determinants of health.

A key part of n4a's advocacy involves raising the visibility of our members and the critical roles they play in communities across the country. We also keep our members updated on the latest developments that may affect their work with regular legislative analyses, advocacy alerts, grassroots tools, educational webinars, trainings and other opportunities for them to meet their own advocacy missions.



Because there is growing evidence showing that the majority of health care costs are driven by factors outside of the clinical environment, often called the social determinants of health,³

and states with a higher ratio of social services to health spending showed better health outcomes on measures such as the number of days with activity limitations and mortality rates for type 2 diabetes, lung cancer and heart attacks⁴...




Our members address those social determinants of health by providing case management, care transitions, nutrition, home care, transportation, home modification and evidence-based programs.

Now that the health care sector is increasingly interested in the social determinants of health, AAAs are entering into partnerships to provide programs and services to managed care organizations, hospitals and other health care payers. In 2017, 41 percent of AAAs responding to a survey reported having at least one contract with a health care entity, and an additional 18 percent were pursuing contracts.⁵

So we provide our members and other CBOs with tools and resources needed to successfully adapt to a changing health care environment.

n4a's Aging and Disability Business Institute is a nationwide initiative funded by The John A. Hartford Foundation, the U.S. Administration for Community Living (ACL), The SCAN Foundation, the Gary and Mary West Foundation, the Colorado Health Foundation, and The Buck Family Fund of The Marin Community Foundation, to build and strengthen partnerships between aging and disability community-based organizations (CBOs) and the health care system in order to improve the health and well-being of America's older adults and people with disabilities. In collaboration with our partners and funders, we:

- ▶ Created an online readiness assessment tool, which guides CBOs through the process of partnership-building with the health care sector. Find it at www.aginganddisabilitybusinessinstitute.org/assessment-intro.
- ▶ Conducted a survey to better understand and quantify CBO business relationships with health care entities, sharing our findings in a report and in *Health Affairs*.
- ▶ Led in-person state and regional trainings for AAAs in 13 states.
- ▶ Awarded the second annual The John A. Hartford Foundation Business Innovation Award to recognize CBOs that are successfully embracing new opportunities in integrated care.
- ▶ Launched the Trailblazers Learning Collaborative to glean insight and lessons learned from 12 of the “best of the best” CBO leaders who have successfully contracted with integrated care entities.



Because isolation is a growing health concern, with more than 8 million adults age 50 and older reporting that they are socially isolated in their communities, which, if prolonged, is equivalent to smoking 15 cigarettes a day,⁶

and according to numerous studies, volunteering just two hours per week improves cognitive, emotional and physical health...

Our members provide services that help reduce social isolation—by providing personal connections through meals delivered to their homes, evidence-based wellness classes at local senior centers, and transportation that enable them to stay engaged in the community. The Aging Network relies heavily on volunteers to deliver these critical services, supplementing the work of their paid staff while offering volunteers positive opportunities to remain engaged in their communities themselves.

So we support the **Aging Network** in developing new approaches to keeping older adults socially engaged in their communities, reducing social isolation and promoting successful aging.




With funding from ACL, n4a launched **engAGED: the National Resource Center for Engaging Older Adults** with partners Generations United, the National Center for Creative Aging, the National Resource Center for Osher Lifelong Learning Institutes, and Older Adults Technology Services (OATS). Early activities have included webinars and new resources from the engAGED partners focused on engagement in the arts, intergenerational activities, volunteerism, lifelong learning and technology.

We completed the work of the ACL-funded **Aging Network Volunteer Resource Center (ANVRC)**, which supported the Aging Network in creating more engagement opportunities, and launched a new n4a University online volunteer management course in partnership with Boston University's Center for Aging and Disability Education and Research. The ANVRC work will be folded into our engAGED efforts.



Because an estimated 90 percent of the nation's 48 million adults older than age 65 want to age well in their own homes and communities, and not in institutions such as nursing homes⁷...



Our members help older adults, people with disabilities and their caregivers access local programs and services through the provision of information and referral hotlines, community education and outreach, and case management.

So we are national leaders in connecting older adults, their caregivers and their families to local resources.

The **Eldercare Locator**, which n4a operates with funding from ACL, connects older adults and caregivers to critical local resources, programs and services to address a wide array of needs related to aging and caregiving. The Eldercare Locator's staff operates a National Call Center (1.800.677.1116) and a website (www.eldercare.acl.gov), both focused on ensuring that older adults and caregivers are connected to the appropriate local resources. Two-thirds of the Locator's referrals are to the local Area Agency on Aging.

In 2017, the Eldercare Locator's call, online chat and email volume reached an all-time high of 357,605 requests for assistance, a 16 percent increase over 2016. This equates to an average of 1,490 inquiries per day—which is more than the *monthly* number of calls the Locator received when it first launched 27 years ago!

To further educate the public about aging issues and to respond to consumers' most pressing needs, we developed several new educational brochures to complement our existing library of resources. Our 2017 *Home for the Holidays* campaign focused on living well in the community with dementia, and we launched a *Critical Conversations* series of fact sheets on medication safety, disaster preparedness and elder abuse.

Because 3.6 million Americans miss or delay non-emergency medical care due to a lack of transportation,⁸

and because transportation is the top reason older adults contact the Eldercare Locator⁹...





Our members provide transportation services that help older adults remain independent and engaged in the community, enabling them to keep critical doctor's appointments, receive meals in community settings, obtain transit training and learn how to manage their mobility options.

So we promote accessible transportation options that reflect the needs of communities.

n4a operates, in partnership with Easterseals, the **National Aging and Disability Transportation Center (NADTC)**, which is funded by the Federal Transit Administration, to promote the availability and accessibility of transportation options for older adults, people with disabilities and caregivers. This year, accomplishments included:

- ▶ A new focus on transportation and caregiving, which led to the development of an NADTC online course specifically addressing the role of AAAs in providing transportation support for caregivers in the community.
- ▶ Responding to input from the field, a *Dementia, Caregiving and Transportation* toolkit was disseminated to all AAAs and Title VI programs, which provides resources and strategies for caregivers and organizations to use as they coordinate transportation to help older adults meet daily needs.
- ▶ In 2018, we will fund up to 10 local "Getting Ready to Innovate" sites to support the development of program innovations designed to increase the availability and accessibility of community transportation services for older adults and people with disabilities.

Through n4a's work on the **Inclusive Coordinated Transportation Planning Partnership Project**, funded by ACL, the needs and preferences of older adults and people with disabilities are guiding the development of new transportation options in up to 20 new grantee communities funded in 2018.

Because one in ten people age 65 and older have Alzheimer's or other dementias and the majority live in their homes and communities¹⁰...





Our members foster, fund and/or deliver local services that help individuals living with dementia and their caregivers—such as in-home supports, personal care, home-delivered meals, caregiver respite, transportation, legal services, adult day care and more,

and to effect broader change, AAAs are leading statewide and local efforts to make their communities better equipped to support people living with dementia.

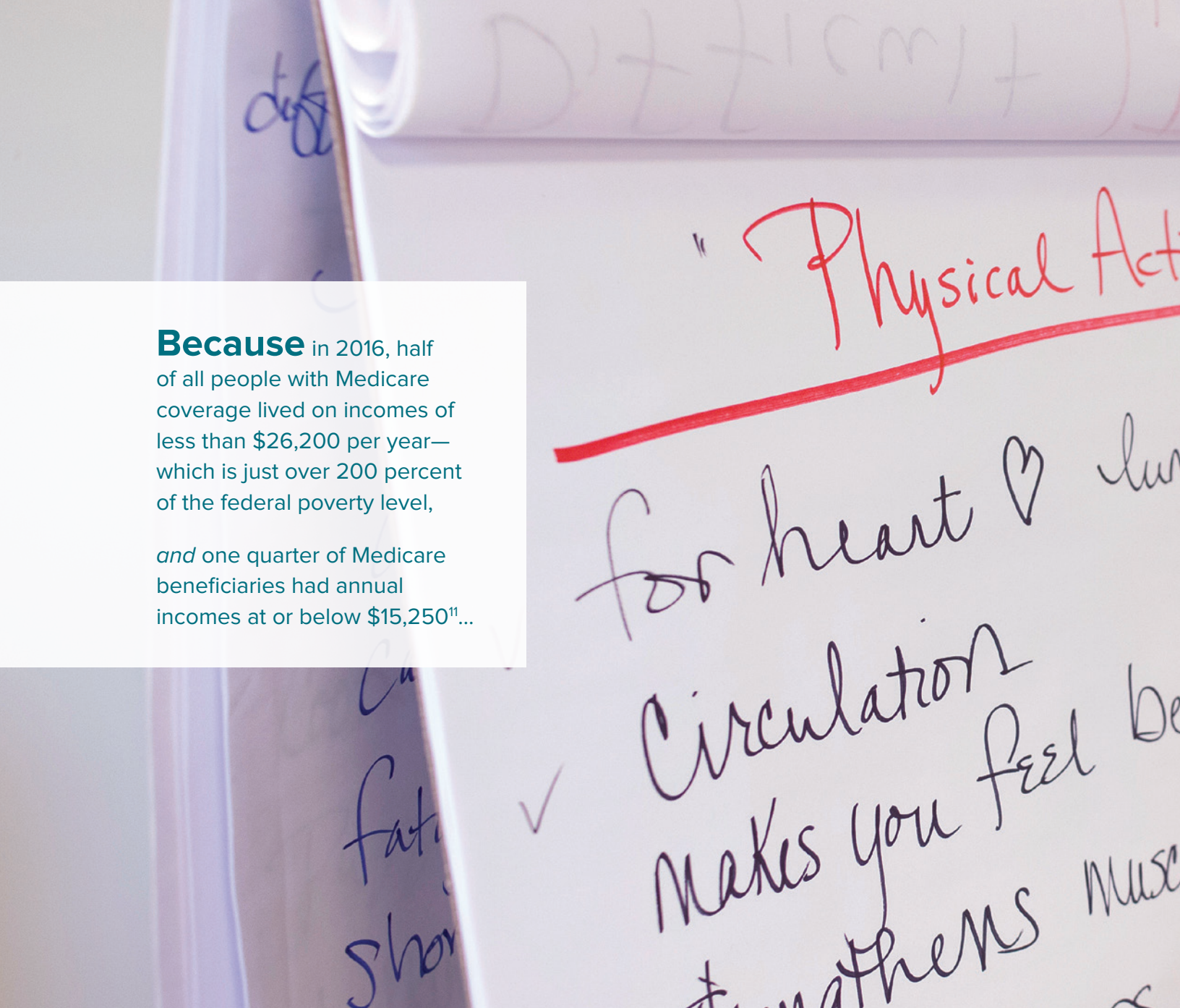
So we are leaders in driving dementia-friendly communities nationwide.

Co-chaired and administered by n4a, **Dementia Friendly America (DFA)** is supporting communities across the country to ensure that counties, cities and towns are prepared for the growing number of individuals and caregivers affected by dementia.

There are now hundreds of communities across 40 states that are part of the DFA network (see dfamerica.org). These communities are working across sectors including health care, business and banking, legal and financial, faith communities, and local government to ensure their communities are friendly and supportive places for people with memory loss and their caregivers to live.

Our DFA team offers monthly webinars, newsletters and technical assistance to support the development of DFA communities, and recently facilitated community stakeholder workshops in Montana, Indiana, Nebraska and Virginia.

DFA also runs the U.S. affiliate of **Dementia Friends** (dementiafriendsusa.org), which helps everyone in the community understand what dementia is, how it affects people and how gestures large and small can make a difference to people living with memory loss.



Because in 2016, half of all people with Medicare coverage lived on incomes of less than \$26,200 per year—which is just over 200 percent of the federal poverty level,

and one quarter of Medicare beneficiaries had annual incomes at or below \$15,250¹¹...

Our members are a trusted resource for unbiased, consumer-friendly information on healthy aging, Medicare, Medicaid, and other governmental programs and benefits. Health fairs, evidence-based health and wellness programs, community forums, health insurance counseling and case management are some of the methods our members use to reach older adults and their caregivers.

So we educate aging professionals and consumers to better understand health and economic security programs and find resources that can help.



n4a, in partnership with the Center for Benefits Access at the National Council on Aging, works to provide training, technical assistance and resources to help AAAs and others enroll low-income Medicare beneficiaries into benefits programs for which they are eligible. This year, we expanded our outreach to non-English-speaking communities by translating into Spanish and Chinese our award-winning **You Gave, Now Save** guide, which details a wide range of government benefits and programs to support economically vulnerable older adults.

Working with UnitedHealthCare on **Medicare education**, n4a provided members with consumer resources for National Medicare Education Week and supported three AAA pilot sites that hosted a wide range of events and activities to disseminate information to consumers.

A partnership with the Alliance for Aging Research on the **Our Best Shot** campaign provided a timely set of consumer-friendly educational brochures on vaccines, Medicare wellness benefits and more.



Because the nation is aging even as it becomes more diverse;
because health care and long-term services and supports financing and delivery systems are rapidly changing;
and because approximately one-third of directors at n4a member agencies told us they plan to retire in the next five years...



Our members continue to innovate and expand their home and community-based services offerings to meet the escalating and increasingly complex needs of older adults in an ever-changing service delivery world.

So we build the capacity of AAAs and Title VI programs with education, best practices, leadership development and training resources developed specifically for the Aging Network.

With funding from the U.S. Administration for Community Living, n4a's **Capacity Building** initiative conducts major surveys of AAAs and Title VI aging programs and periodic hot-topic polls. Recent reports focused on how AAAs measure the financial impact of their services, how they are addressing housing and homelessness, and a special dig-deeper analysis of rural data from the AAA National Survey Report. Agencies are encouraged to use this information in their own strategic planning, advocacy, research or benchmarking efforts.

n4a produced five full days of rich educational content and networking at our 42nd **Annual Conference & Tradeshow**, which was held in July in Savannah. More than 1,000 professionals from across the nation participated, taking advantage of 125 workshop options, a tradeshow full of new resources and access to policymakers, thought leaders and new partners.

Thirty-five AAA professionals graduated from n4a's 11th annual **Leadership Institute**. The class of 2018 learned strategies for leading in these fast-changing times, including building staff morale, becoming better communicators and how to inspire and drive organizational innovation. Financial support for the Leadership Institute was provided by Mediware and Bateman Community Living.

We also showcased innovations and other successful programs through our **Aging Innovations and Achievement Awards**, earning 45 of our members' programs national recognition and compiling a 40-page book of best practices that the entire Aging Network may use to adapt or replicate these successful initiatives in their communities. Financial support for the awards was provided by WellCare Health Plans.

Reflections on 2017–2018



KATHRYN C. BOLES
PRESIDENT

AS WE REFLECT ON A YEAR of milestones and new beginnings, we pause to thank our members, partners, funders and other stakeholders who share our passion for building a society that values and supports people as they age.

After a tremendously successful 42nd Annual Conference in July, the Aging Network faced challenges as summer turned to fall, with disasters in Texas, Florida, Puerto Rico and California putting older adults in harm's way. Thanks to the generosity of our members and other donors, the **n4a Disaster Relief Fund** was able to provide nearly \$10,000 in cash assistance to four AAAs in affected states to help them better support older adults in need. In addition, n4a worked with Tivity Health to provide a total of \$29,000 to five Texas AAAs affected by the floods, and support to the Valley AAA in Flint, Michigan, which is still dealing with a major water crisis.

In January, n4a launched a new national resource center in concert with four partners and with funding from ACL. **engAGED: the National Resource Center for Engaging Older Adults** will develop a national strategy to engage older adults by identifying and disseminating information about emerging trends, resources, innovations and model programs that the Aging Network can tailor for local use.

We hit a milestone in March when the **Eldercare Locator received its four millionth call!** The caller, the 1,033rd to reach us that day, was looking for information on aging services, which our call center team provided to more than 357,000 people in 2017—another record-breaking number.



SANDY MARKWOOD
CEO

As that demand for access to services continues to increase year after year, n4a's President created two special task forces in 2017: the **Mission Forward** group is examining how n4a can best advance the AAA network in the face of great demographic demand and shifting economic landscapes. The **Diversity** task force is exploring how to ensure our Network has the leaders and workforce we need to serve an increasingly diverse older adult population and address health disparities.

Our **persistent advocacy won the day for FY 2018** federal funding, with OAA and related services receiving much-needed and long-overdue increases, including 10–20 percent increases for *all* of n4a's top priorities: OAA Title III B Supportive Services, Title III E National Family Caregiver Support Program and Title VI Native American aging programs. Last year's #SaveMedicaid campaign also took us to new levels, with new, customizable consumer messages for our members to use locally to engage older adults and other stakeholders in the Aging Network's advocacy efforts.

And perhaps most importantly, we've worked tirelessly to **meet our members' professional and educational training needs**. Our webinars, publications, e-blasts and in-person events have addressed a wide range of aging, caregiving and health topics. Our staff traveled the country speaking to and with members and their networks at nearly two dozen forums, coming back to DC with greater knowledge of the challenges that older adults currently face and the innovative approaches our members take to address them.

Thanks in part to these efforts and the expanding portfolio of services and supports from n4a members, we believe the Aging Network has never been better positioned to build on its reputation as the gold standard for the provision of home and community-based services in America.

Thank you for being on this journey with us.




Consolidated Statement of Financial Activities for Twelve Months Ending December 31, 2017

SUPPORT AND REVENUE

Membership Dues	\$941,489
Government Grant/In-Kind/Foundation/Net Assets Released	\$4,847,959
Conferences/Seminars/Training	\$1,088,356
Product Sales/Interest/Other Income	\$663,547

TOTAL SUPPORT AND REVENUES	\$7,541,351
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EXPENSES

Membership/Fundraising/Overhead (Programs & Overhead)	\$1,169,795
Government Grants/In-Kind/Foundation	\$5,627,488
Conferences/Seminars/Training	\$790,020
Communications and Outreach/Public Policy	\$853,332

TOTAL EXPENSES	\$8,440,635
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Change in Net Assets**	(\$899,284)
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Net Assets, Beginning of Year	\$2,913,461
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Net Assets, End of Year	\$2,014,177
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*Note: Information taken from the n4a un-audited draft consolidated Statement of Activities as of 12.31.2017.
Audited by Cocchiaro & Associates.*

*** Primarily due to the full recognition of the three-year The John A. Hartford Foundation grant revenues in FY 2016, and incurring the year two expenditures of The John A. Hartford Foundation grant in FY 2017 with no revenue offset.*

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Notes

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The cover photo is a winning entry in the NADTC photo contest and is courtesy of the Wallingford, CT, Committee on Aging, Inc.

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