



advocacy | action | answers on aging

National Association of Area Agencies on Aging



2015 › 2016
Annual Report

Achieving Impact

Building Momentum



Message from n4a President Joe Ruby



Joe Ruby
n4a President, 2014-2016
CEO, Direction Home
Akron Canton Area
Agency on Aging,
Akron, OH

When I became n4a's president in July 2014, I set several targeted goals for our association to achieve in my two-year term.

The top priority was securing a bipartisan reauthorization of the Older Americans Act, which we achieved this April! The next reauthorization will be upon us in three short years, however, and I know this association will once again be at the forefront of efforts to modernize this historic Act.

Roughly 100 AAAs developed new partnerships with hospitals under the federal Community-based Care Transitions Program over the past few years, and although the original federal funding stream will be ending shortly, n4a has worked to capture lessons learned, explore and advance other care transitions policy opportunities and ensure that the critical role of AAAs in such transitions is valued... and funded.

There's more work ahead for AAAs seeking alternative funding for these and

other health care partnerships, and our association will continue to lead the way in promoting opportunities for the Aging Network to contract with health care entities to improve the health and well-being of older adults and people with disabilities nationwide.

Many of you know the value of the federal Money Follows the Person (MFP) program and the huge difference it has made in rebalancing long-term services and supports. MFP expires in 2017 and n4a staff is already participating in DC discussions about the reauthorization. We will need to work closely with our peers, states and n4a to ensure that MFP is a continued source of funding and authority to help older adults and people with disabilities live in the least-restrictive setting of their choice.

Serving as n4a's president is among the most treasured experiences of my life and I thank our members for allowing me to play a role in supporting their vital work.

Year in Review by n4a CEO Sandy Markwood

This has been a banner year for n4a and the Aging Network on so many fronts! We achieved a major policy victory with the reauthorization of the Older Americans Act after six years working together to make the case on Capitol Hill. After countless meetings with Members of Congress and staff, we can proudly declare that the mandate to ensure the delivery of vital services to nearly 11 million older Americans and their caregivers has been reinforced by Congress once again.

Years of hard work paid major dividends in other key areas, too. Building on two decades of expertise in accessible transportation, n4a was selected to partner with Easter Seals on the formation of the National Aging and Disability Transportation Center. The Center will work to support the delivery of more effective, efficient, high-quality and coordinated specialized transportation services.

This spring, n4a's track record of success in building the capacity of the Aging Network was rewarded when we were selected to lead a major initiative to build the business acumen of the Aging and Disability Networks. With the establishment of the National Aging and Disability Business Center, we will bring an exciting, new level of support to agencies eager to partner with health care entities to provide critical social supports to older adults and people with disabilities.

The Eldercare Locator also experienced a record-breaking year, receiving an all-time annual high of over 280,000 requests for assistance, with inquiries coming from older adults and caregivers in all 50 states and virtually every U.S. territory.

And all of this achievement didn't go unnoticed by the media. The expertise of n4a and our members was showcased in over thirty major stories, including coverage in *USA Today*, the *Associated Press* and the *Washington Post*—significantly increasing the visibility and standing of our Network.

Finally, we shattered attendance records at the n4a 40th Annual Conference & Tradeshow, as nearly 1,000 local aging leaders and professionals gathered in Philadelphia to celebrate the Network's four decades of dedication and service to older adults and caregivers nationwide.

Yes, it's been an exceptional year, but we're not resting on our laurels. The 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 by expanding its portfolio of services and supports and serving more people than ever before.

These are exciting and momentous times. We are proud and privileged to support your tremendous efforts as we continue on this journey together.



Sandy Markwood
n4a CEO

A handwritten signature of Sandy Markwood in dark ink, written in a cursive style.

Public Policy and Advocacy

Moving the Needle on Capitol Hill



In our advocacy work, one of n4a's most important tasks is to educate federal elected officials about the impact of policy and budgetary decisions on older Americans and family caregivers. We also build our members' advocacy capacity by offering insightful legislative analyses and updates, grassroots training and support, and educational events.

As leaders in the national aging community, n4a:

- advanced and achieved **bipartisan reauthorization** of the Older Americans Act.
- defended proposed cuts to OAA funding in FY 2016 and were key collaborators in a nationwide effort to raise too-stringent caps on overall non-defense discretionary funding levels.
- engaged in **intensive advocacy within the Administration** to support the critical role of the Aging Network in a shifting paradigm of health care delivery.
- promoted and defended **stronger policies in health care**, transportation, Livable Communities and other policy issues affecting older adults and caregivers.



President Obama speaks at 2015 White House Conference on Aging

Our work supported our members through:

- our Policy Priorities, which combined with complementary **grassroots tools** that made the case for our agenda, helped our members speak in a unified, powerful voice for older adults and caregivers.
- our leadership in hosting the nation's largest 2015 **White House Conference on Aging** watch party during the n4a 40th Annual Conference and Tradeshow.
- our outreach to every AAA and Title VI program with distinct **calls to action** over the course of the year via our *Advocacy Alerts*.
- the release of *Legislative Updates*, offering our members **behind-the-scenes analysis** of our top policy issues.
- **dozens of policy presentations** at state and local AAA conferences and meetings, as well as several webinars to help our members stay up to speed and engaged as advocates.



Mary Beals-Luedtka, Director, Area Agency on Aging-Northern Arizona Council of Governments, Anne Hinton, former Board Member and former Director of San Francisco Department of Aging and Adult Services, Joe Ruby, n4a Board President, at the White House Conference on Aging

The 22nd annual n4a Aging Policy Briefing & Capitol Hill Day brought together 150 AAA and Title VI Native American aging program executives and staff, local and national aging advocates and aging policy experts in Washington, DC from April 25-26, 2015. Record-setting attendance reflected the critical need for advocates for older adults to understand current aging policy issues and to educate Members of Congress and the administration about the important work being done in communities across the country.

Building Business Acumen

Paving the Way for Integrated Care Opportunities



n4a has made it a top priority to help the Aging and Disability Networks play a major role in partnering with health care entities on integrated care opportunities. For the past three years, we have worked with ACL and other aging and disability groups to provide customized, in-person and web-based business acumen trainings and technical assistance to advance integrated care opportunities for the Aging Network and other community-based organizations (CBOs).

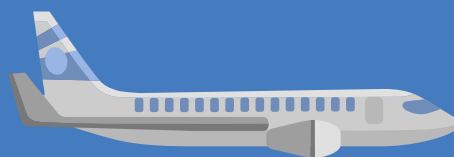
n4a serves as the leader of the **Managed Care Advisory Council (MCAC)** to support training and the development of tools for CBOs to engage, partner and contract with the health care sector. The MCAC is comprised of industry leaders from managed care organizations (MCOs),

health provider groups, health care service providers and consultants. In this role, n4a serves as a bridge between the health care industry and CBOs, providing tools and resources to help CBOs effectively partner with the health care sector.

To bring our efforts to national scale, n4a received a major grant from The John A. Hartford Foundation to enable us to partner with Independent Living Research Utilization, Partners in Care Foundation, Elder Services of the Merrimack Valley and the American Society on Aging to establish the **National Aging and Disability Business Center**. The Business Center will be the "go-to" resource for aging and disability organizations interested in developing business acumen to be better positioned to partner with health care entities.



n4a engaged with
15 health plans
as part of MCAC



n4a staff logged
**thousands of hours
and miles**
training several hundred Aging
Network leaders, staff and partners

Alabama • Arizona • California • Georgia • Illinois • Indiana • Iowa • Massachusetts



**In-person trainings
were conducted
from coast-to-coast**

Missouri • Pennsylvania • Tennessee • Virginia • Washington, DC

**Conducted 10 education
and training webinars**

**Expertise on a wide
array of topics:**

- Culture change
- Organizational change
- Pricing
- Service packaging
- Diversifying funding/sustainability
- Strategic planning/business planning
- Relationship building/partnerships with health care
- Integrated care opportunities
- Marketing and branding
- Systems change
- Leadership
- LTSS environment



**Provided support for
1,500+ members
of the Aging and Disability
Networks**

Eldercare Locator

Record-Breaking Year Connecting Older Adults to Vital Resources



The Eldercare Locator is the **only national information and referral resource** to provide support to consumers seeking assistance across the spectrum of issues affecting older Americans. Funded by the U.S. Administration on Aging and administered by n4a, the Locator helped more older adults and caregivers connect to Area Agencies on Aging, Title VI aging programs and a wide range of other resources than ever before. The geographic reach of the Locator is extensive, with inquiries coming from all 50 states, the District of Columbia and most U.S. territories.



Connecting You to Community Services

The Call Center operates weekdays
from **9:00 a.m. to 8:00 p.m. E.T.**

Certified Information Specialists
can be reached at

800.677.1116

or

www.eldercare.gov



280,477
requests for assistance in 2015



74%
of requests
came from women

70%
were older adults
calling about themselves

Top 5 request categories



Transportation



**Housing
Options**



**In-Home
Services**



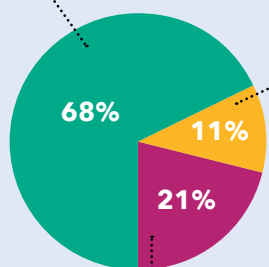
**Health
Insurance**



**Social
Security**

Who did we connect callers to?

**Local Area Agencies
on Aging**



Government Agencies
(Social Security; Medicare;
Veterans Affairs; State
Medicaid Office; Social
Services, etc.)

Other (State Health Insurance Assistance
Programs; Aging and Disability Resource
Centers; Insurance Providers; Adult
Protective Services; National Nonprofits)

The Eldercare Locator is a valuable source of data on aging trends and regularly raises public awareness of important issues through national education campaigns.



Transportation

Increasing Access and Options



n4a and Easter Seals partnered to develop a winning proposal for the Federal Transit Administration's newly created **National Aging and Disability Transportation Center** (NADTC), which began operation in October 2015. NADTC's mission is to help states and communities nationwide to increase the availability of accessible transportation for older adults and people with disabilities. The Center also partners with the Eldercare Locator to ensure that people seeking rides are seamlessly connected to local information resources.

A new website and communication tools to ensure 24/7 access to NADTC resources and information were developed, along with publications to raise awareness of important transportation-related issues.

The NADTC builds on the work of the National Center on Senior Transportation (NCST), which, during this period, released two important publications on how to prevent transportation-related falls and how to support the needs of those with dementia who take public transportation.

n4a is also a partner in the Administration for Community Living project on Inclusive Coordinated Transportation Planning, which focuses on engaging older adults and people with disabilities in planning and developing community transportation services that are more responsive to their needs. Seven grantees received funding and completed their work in 2016 and will serve as mentors to eight new grantees selected through a competitive process. Case studies were developed to showcase the work of the original grantees.



Leading Volunteer Engagement Innovation

Aging Network Volunteer Resource Center



The **Aging Network Volunteer Resource Center** (ANVRC) expanded its outreach to promote the involvement of volunteers in the Aging Network. At the request of the national Senior Medicare Patrol (SMP) and State Health Insurance Assistance Program (SHIP) resource centers, the ANVRC developed an *Introductory Guide* that provides a blueprint for the implementation of n4a's innovative self-directed volunteer team model.

The n4a engagement model was adopted by the resource centers to solve persistent volunteer recruitment and retention issues and to establish a new volunteer leadership role within local programs to facilitate outreach to diverse populations and expansion of services to underserved areas. n4a hosted a series of webinars to

further assist the SMP/SHIP networks with implementation efforts.

During this period, the ANVRC targeted select states for outreach and training. The Pennsylvania Department on Aging integrated n4a's volunteer engagement model into its application for a SHIP innovation grant. The grant application was awarded by the Administration for Community Living and 10 teams were ultimately formed by five AAAs as pilot sites. Five teams conducted local SHIP programs self-assessments and the other five teams recruited and trained SHIP volunteers.

ANVRC also worked with the Greater Wisconsin Area Agencies on Aging Resources, Inc. to conduct a second, state-wide program featuring the self-directed volunteer engagement strategy.

Medicare Education & Outreach

Promoting Awareness and Action



As the Aging Network's footprint in the integrated care landscape has grown, so has n4a's commitment to supporting the work of its members to make Medicare beneficiaries more informed consumers and, thus, more in control of their health and well-being.

The strategy to develop these resources, and a recently released online Medicare counseling course, with guidance from our members has led to high levels of member engagement in this program.

We also teamed up with UHC on the **National Medicare Education Week** campaign, an annual observance to help older adults better understand their Medicare Part D prescription options. AAAs across the nation participated in this campaign by holding events and leveraging traditional and social media to build public awareness of this crucial issue.

Our work, in partnership with UnitedHealthcare® (UHC), to support the vital Medicare counseling role of the Aging Network was well received by our members. Our comprehensive portfolio of **Train-the-Trainer Medicare Education** resources has facilitated the training of hundreds of AAA staff and volunteers.



**More than
9,000 copies
distributed to nearly
100 AAAs and other
organizations nationwide
in just 6 weeks**

Our efforts to spread public awareness, in collaboration with NCOA's Center for Benefits Outreach and Enrollment, of the importance of accessing valuable benefits to meet basic needs kicked into high gear with the launch of the **You Gave, Now Save** campaign. The response to the centerpiece of the campaign, the **Guide to Benefits for Seniors**, was unprecedented. A number of major news outlets also showcased the campaign in stories that examined the impact of underutilization of benefits on the quality of life of older Americans.

Answers on Aging Shining a Spotlight on Top Aging Issues

We joined forces with Walgreens to launch a national campaign to raise awareness that millions of dollars in pharmacy benefits are left on the table by older Americans every year. AAAs nationwide engaged in the **Answers on Aging™ | Pharmacy Benefits** campaign, leveraging events, one-on-one counseling and media interest to spread the word. This program also connected AAAs with Walgreens leaders in their communities so they could explore additional partnership opportunities.

In collaboration with Wells Fargo Advisors, we launched the **Answers on Aging™ | Financial Exploitation** campaign to educate the public about the epidemic of financial scams targeting older adults. A consumer brochure was developed to provide AAAs and the public with tips and resources to help seniors avoid being the victims of this type of abuse. AAAs have ordered thousands of copies of the brochure and the campaign was showcased in a major story by *USA Today*.



Building Livable and Dementia-Friendly Communities

n4a continues its 10+ years of leadership in promotion and advocacy focused on building Livable Communities that address the needs of people across their lifespans. n4a has provided technical assistance and training to communities on the value of creating Livable Communities for all ages—places where people can grow up and grow old with dignity and independence.

In 2015, n4a joined a growing coalition of national organizations called Dementia Friendly America, a multi-sector collaboration developed to

foster communities that effectively support and serve individuals who are living with dementia, their family and care partners. The initiative was launched at the 2015 White House Conference on Aging. As part of the Dementia Friendly America leadership team, n4a is helping to promote and support the work of dementia-friendly communities and to catalyze other communities to join the movement.



National Research

Drilling Down on Aging Network Progress

During this period, two major research projects were launched—the **Aging Prisoners Poll**, which explores how the Aging Network is supporting America’s aging prisoners, the fastest-growing segment of the U.S. prison population, and the **5th Annual AAA Survey**, the most comprehensive review of

AAA programs and services in the U.S. Financial support for these vital research initiatives was provided by the Administration for Community Living. Scripps Gerontology Center at Miami University also served as an essential partner on the development of the AAA Survey.



n4a CEO Sandy Markwood with Arlington, VA AAA and community leaders



n4a Policy Director Autumn Campbell with Connecticut AAA and state leaders

Connecting With Our Members

Our CEO Sandy Markwood and senior staff were frequently on the road during this period, meeting members where they are, to better help AAAs manage this rapidly changing environment.

In 2015-2016, n4a staff supported our members with in-person and web-

based presentations at **more than 30 local, statewide and regional AAA-led conferences and meetings**. They shared n4a’s national perspective and the latest information and insights from our nation’s capital. We also made dozens of presentations to broader audiences, reaching potential allies beyond the Aging Network, to engage them in the work of our members.

n4a 40th Annual Conference & Tradeshow



All four former and current Assistant Secretaries on Aging celebrate the 50th anniversary of the Older Americans Act at the n4a Conference in Philadelphia.

Nearly 1,000 local aging leaders and professionals gathered in Philadelphia, breaking previous attendance records. Attendees were drawn by the opportunity to celebrate four decades of achievement by the Network, to participate in the nation's largest White House Conference on

Aging watch party and to hear from all current and former Assistant Secretaries for Aging, who engaged in a fascinating discussion about how the national aging dialogue has evolved over the years. The Conference's high-profile activities also attracted considerable media coverage.



Aging Innovations & Achievement Awards

Every year, n4a proudly recognizes the best practices of our members through the n4a *Aging Innovations and Achievement Awards* (AIA) program. The awards highlight effective, leading-edge programs that demonstrate sound management practices that are replicable by others in the Aging Network. *Aging Innovations Awards* honor the most cutting-edge programs among the nominations received and the *Aging Achievement Awards* recognize programs

that meet all of the award eligibility criteria as a contemporary, effective and replicable program. At the 40th Annual Conference and Tradeshow in Philadelphia, 16 *Innovations* and 22 *Achievement Awards* were presented. The AIA program is generously sponsored by Critical Signal Technologies (CST).



2015 n4a Aging Innovations Award winners from the United Way of Tarrant County AAA with n4a, CST and ACL leadership

Helping To Shape the Aging Network's Future Leaders



Tina Miller and n4a CEO Sandy Markwood

"I discovered new ways of thinking about my job, my leadership style and the strengths and contributions of each of my staff. The relationships I formed at the Leadership Institute will be lifelong."

Tina Miller, Class of 2016
Director, Western Piedmont
Council of Governments AAA

Nearly 40 directors and staff from n4a member agencies across the country convened on the campus of Georgetown University in February for the 9th annual Leadership Institute. The class of 2016 learned strategies for leading in these fast-changing times across a spectrum of issues, including building staff morale, becoming better communicators and how to inspire and drive organizational innovation. Response to the Institute was overwhelmingly positive with graduates reporting that they not only left with guidance that they can put into action immediately, but that they formed powerful, new relationships with colleagues.

We are thankful for the long-standing support of this program by Harmony Information Systems (a division of Medware) and Bateman Community Living.

Mission / History / Financials

The mission of the National Association of Area Agencies on Aging (n4a) is to build the capacity of its 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. We work with our members to achieve the collective vision of building a society that values and supports people as they age.

n4a is the leading voice on aging issues for Area Agencies on Aging (AAAs) and a champion for Title VI Native American aging programs. Through advocacy, training and technical assistance initiatives, we support the national network of 622 AAAs and 256 Title VI programs.

AAAs were established under the Older Americans Act (OAA) in 1973 to respond to the needs of Americans age 60 and older in every local community. By providing a range of options that allow older adults to choose the home and community-based services and living arrangements that suit them best, AAAs make it possible for older adults to “age in place” in their homes and communities.

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

Consolidated Statement of Financial Activities For Twelve Months Ending December 31, 2015

SUPPORT AND REVENUE

Membership Dues	\$850,942
Government Grant/In-Kind/Foundation/Net Assets Released	\$4,933,189
Conferences/Seminars/Training	\$1,079,978
Product Income/Interest/Other Income	\$385,850

TOTAL SUPPORT AND REVENUE **\$7,249,959**

EXPENSES

Membership/Fundraising/Overhead (Programs and Overhead)	\$1,236,296
Government Grants/In-Kind/Foundation	\$4,342,344
Conferences/Seminar/Training	\$786,280
Communications and Outreach/Public Policy	\$587,756

TOTAL EXPENSES **\$6,952,676**

Change in Net Assets	\$297,283
Net Assets, Beginning of Year	\$361,450
Net Assets, End of Year	\$658,733

Note: Information taken from the n4a draft audit consolidated Statement of Activities as of December 31, 2015. Audited by Cocchiaro & Associates.

n4a Staff

Sandy Markwood

Chief Executive Officer

Sarah Casiano

Executive Assistant and Program Coordinator

Public Policy & External Affairs

Amy E. Gotwals

Chief, Public Policy and External Affairs

Autumn Campbell

Director, Public Policy and Advocacy

Dallas Jamison

Director, Communications

Star Johnson

Communications Associate

Rebecca Levine

Membership and Outreach Associate

Finance & Administration

Doug McKenzie

Chief, Finance and Administration

Martin Kleffner

Director, Operations

Maggie Cheung

Office Administrator

Programs

Nora Super

Chief, Programs and Services

Tom Endres

Program Director, Aging Network Volunteer Resource Center

Stephanie Firestone

Program Director, Livable Communities

Meredith Eisenhart

Senior Program Manager, Capacity Building

National Aging and Disability Business Center

Mary Kaschak

Deputy Director

Davis Baird

Program Associate

National Aging and Disability Transportation Center

Virginia Dize

*Program Director, n4a and
Co-Director, NADTC*

Eileen Miller

Senior Program Associate

Jeffrey Graney

Technical Assistance Associate

Yolanda Stewart

Program Assistant/Information Specialist

Eldercare Locator

Patrice Earnest

Director

John E. Gonzales

*Coordinator, Information Technology and
Analytics*

Melisa Lopes

Coordinator, Information and Referral

Jasmine Ng

Senior Enhanced Services Specialist

Carlos Dávila

Enhanced Services Specialist

Eliane Ferreira

Information Specialist

Danita Gregory

Information Specialist

Tonya Gregory

Information Specialist

Jorge Pedreira

Enhanced Services Specialist

Sheena Phillip

Information Specialist

Timothy Platte

Information Specialist

Damien Solomon

Information Specialist

Elvey Watson

Information Specialist

n4a 2015-2016 Board of Directors

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Crystal L. Carter, *1st Vice President*
Kathryn C. Boles, *2nd Vice President*
Odile Brunetto, *Secretary*
Robert Crowder, *Treasurer*

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Rosanne DiStefano, *Lawrence, MA*
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Christine Alessandro, *Marlborough, MA*

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Frances A. Benson, *Elizabeth, NJ*
Crystal L. Carter, *Plattsburgh, NY*
Alternates:
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Mary Ann Spanos, *Mayville, NY*

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Odile Brunetto, *Rockville, MD*
Alternate:
Brenda Landers, *Dunbar, WV*

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Aaron Bradley, *Knoxville, TN*
Alternates:
Barbara Gordon, *Louisville, KY*
Linda Levin, *Jacksonville, FL*

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Kathryn Boles, *Flint, MI*
Alternates:
Robert Kellerman, *Madison, WI*
Pam Curtis, *Muskegon, MI*

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Donald R. Smith, *Fort Worth, TX*
Clark Miller, *Tulsa, OK*
Alternates:
Doni Green, *Arlington, TX*
Kay Carter, *Big Cabin, OK*

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Barbara Morrison, *Council Bluffs, IA*
Alternates:
Julie Govert Walter, *Manhattan, KS*
Mike Isaacson, *Waterloo, IA*

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Kristy Cottrell, *Farmington, UT*
Stephen Holland, *Salida, CO*
Alternates:
Becky Kapp, *Salt Lake City, UT*
Eva Jewell, *Greeley, CO*

Region IX

Diane Kaljian, *Santa Rosa, CA*
Deborah Stone-Walls, *Wailuku, HI*
Alternates:
Cynthia Banks, *Los Angeles, CA*
Mary Lynn Kasunic, *Phoenix, AZ*

Region X

David Kelly, *Vancouver, WA*
Peggy Brey, *Portland, OR*
Alternate:
Roy Walker, *Port Hadlock, WA*

Title VI

Lisa James, *Tahlequah, OK*
Glenn Carlo, *Fairbanks, AK*
Alternate:
Brenda House, *Wyandotte, OK*



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