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MONDAY, APRIL 3

7:30-8:30 a.m.  Registration opens and breakfast for pre-conference attendees

8:30-12:00 p.m.  **Aging and Disability Business Institute Pre-Conference: CBO Opportunities in Health Care Payment and Delivery System Reform**

8:30-8:45 a.m.  **Welcoming Remarks**
- Sandy Markwood, CEO, n4a

8:45-9:15 a.m.  **What You Need to Know About Medicare Payment Reform**
- Len Nichols, PhD, Director, Center for Health Policy Research and Ethics, George Mason University; Member, Physician-Focused Payment Model Technical Advisory Committee; Board Member, National Committee for Quality Assurance

9:15-10:15 a.m.  **The Role of CBOs in Promoting Health and Well-Being: Reimbursement Opportunities for Evidence-Based Programs**
- Kristie Kulinski, Aging Services Program Specialist, Administration on Aging, Administration for Community Living
- Kathleen A. Cameron, MPH, Senior Director, Center for Healthy Aging, National Council on Aging
- Sue Lachenmayr, MPH, CHES, State Program Coordinator, Living Well Center of Excellence, MAC, Inc., Salisbury, MD

10:15-10:30 a.m.  Break

10:30 a.m.-Noon  **Partnering with Primary Care to Improve Access and Care Coordination**
- Tim McNeill, RN, MPH, Health Care Consultant
- Robert Schreiber, MD, Medical Director of the Healthy Living Center of Excellence; Clinical Instructor of Medicine, Harvard Medical School

Noon-1:00 p.m.  Lunch on Your Own

**Aging Policy Briefing**

1:00-1:15 p.m.  **Welcoming Remarks**
- Sandy Markwood, CEO, n4a
- Kathryn Boles, President, n4a and President & CEO, Valley AAA, Flint, MI
1:15-1:45 p.m.  **First 100 Days of a New Congress and New Administration—and What It Means for Older Adults**  
- Adriel Bettelheim, Health Care Editor, POLITICO

1:45-2:45 p.m.  **Budget, Reconciliation and Appropriations in 2017 and Beyond**  
- Sharon Parrott, Senior Fellow and Senior Counselor, Center on Budget and Policy Priorities

2:45-3:00 p.m.  Refreshment Break

3:00-4:00 p.m.  **Medicaid, Medicare and the Road Ahead**  
- Elizabeth Hagan, Associate Director of Coverage Initiatives, Families USA
- David Lipschutz, Managing Attorney, Center for Medicare Advocacy

4:00-5:00 p.m.  **State Perspectives on the Future of Health Care**  
- Hemi Tewarson, Interim Division Director, Health Division, National Governors Association
- Matt Salo, Executive Director, National Association of Medicaid Directors

5:15 to 6:00 p.m.  **Advocacy Roundtable**  
Optional open discussion with n4a policy team on talking points and advocacy strategies for Capitol Hill visits. Bring your questions!

**Tuesday, April 4**

7:30-8:30 a.m.  Registration Opens and Breakfast Buffet

8:30-9:15 a.m.  **Framing Our Messages: n4a 2017 Policy Priorities**  
- Amy Gotwals, Chief, Public Policy & External Affairs, n4a
- Autumn Campbell, Director, Public Policy & Advocacy, n4a

9:15-10:00 a.m.  **Federal/State Advocacy: Best Practices from the Field**  
- Janet Zander, Advocacy and Public Policy Coordinator, Greater Wisconsin Agency on Aging Resources, Inc., Madison, WI
- Robert Kellerman, Executive Director, Greater Wisconsin Agency on Aging Resources, Inc., Madison, WI
- Bob Cleveland, Aging Program Planner, Piedmont Triad Regional Council AAA, Kernersville, NC

10:00 -10:45 a.m.  **Program Updates from the Administration for Community Living**  
- Dan Berger, Acting Assistant Secretary on Aging and Acting Administrator, Administration for Community Living
- Edwin Walker, Deputy Assistant Secretary on Aging, Administration on Aging, Administration for Community Living

10:45-11:00 a.m.  Break

11:00-Noon  **Policy Potpourri: Updates on Transportation, Housing & Elder Justice Policy**  
- Adrea Turner, Director, Transportation for America
- Linda Couch, Vice President of Housing Policy, LeadingAge
- Robert Blancato, National Coordinator, Elder Justice Coalition

Noon-12:15 p.m.  **Call to Action & Closing Remarks**  
- Sandy Markwood, CEO, n4a

12:15-5:00 p.m.  **Capitol Hill Visits, On Your Own**
Kathryn C. Boles (Kathy) is the President, CEO of the Valley Area Agency on Aging (VAAA) and has worked in the field of aging since 1990. Kathy began her tenure at VAAA as a consultant for the nutrition programs and then as the Senior Program Coordinator, having oversight of the agency’s Multi-Year Plan development and contract management, as well as continued oversight of the nutrition programs. In 1998, she prepared the grant application which expanded the MI Choice (Medicaid Waiver) program to VAAA. Later she was designated as the MI Choice Waiver Director, having oversight of all aspects of developing the “Waiver” program, including hiring Waiver staff and provider pool development.

In 2001 she was named Deputy Director of VAAA, and appointed President, CEO in FY 2004. Since then she has moved the Agency forward by raising community awareness of VAAA and implementing several unique programs serving older adults and their families in Planning and Service Area (PSA) 5. VAAA’s service area consists of Genesee, Lapeer and Shiawassee Counties. Kathy has made great strides in stepping up VAAA advocacy efforts by increasing participation of the “Senior Power Day” event, making it one of the largest senior events in the State.

Kathy is active in civic and professional organizations serving at the local, state, and national level, such as the Zonta Club of Greater Flint, Delta Sigma Theta Sorority, Inc. – (a public service sorority), and the National Association of Area Agencies on Aging, serving on its Board of Directors and elected President for 2017-2018.

Kathy served as guest lecturer on aging programs at the University of Michigan – Flint, as well as Mott Community College, and she holds a Bachelor’s Degree in Business Administration from Central Michigan University.

Sandy Markwood is the Chief Executive Officer of the National Association of Area Agencies on Aging (n4a). Ms. Markwood has over twenty years of experience in the development and delivery of aging, health, human services, housing and transportation programs in counties and cities across the nation.

As CEO, Sandy is responsible for n4a’s overall management. She sets strategic direction for the staff, oversees the implementation of all policy, grassroots advocacy, membership and program initiatives. She also leads n4a’s fundraising efforts and engages corporate sponsors to support critical initiatives, including an aging
awards/best practices program and the Leadership Institute for Area Agency on Aging staff. Externally, Sandy forms strategic partnerships with federal agencies and organizations in aging, human services and health care arenas to enhance the role and recognition of Area Agencies on Aging and Title VI programs.

Prior to coming to n4a in January 2002, Sandy served as the Deputy Director of County Services at the National Association of Counties where she took a lead role in research, training, conference planning, program development, technical assistance and grants management. She has also served as the Assistant to the County Executive in Albemarle County, Virginia, and as a project coordinator at the National League of Cities. Sandy holds Bachelor’s and Master’s degrees from the University of Virginia.

**Len Nichols** is the Director of the Center for Health Policy Research and Ethics (CHPRE) and a Professor of Health Policy at George Mason University. He has been intimately involved in health reform debates, policy development, and communication with the media and policy makers for 20+ years, after he was Senior Advisor for Health Policy at the Office of Management and Budget (OMB) in the Clinton Administration. Since that time he has testified frequently before Congress and state legislatures, published widely and spoken to a tremendous range of hospital associations, physician groups, and health policy forums around the country. After OMB, Len was a Principal Research Associate at the Urban Institute, Vice President of the Center for Studying Health System Change, and Director of the Health Policy Program at the New America Foundation. In addition to his positions at GMU, Len is on the Board of Directors of the National Committee for Quality Assurance and an advisor to the Patient Centered Primary Care Collaborative. Len is also a member of the Physician-Focused Payment Model Technical Advisory Committee (PTAC). PTAC was established under the Medicare Access and CHIP Reauthorization Act of 2015 (MACRA) to make comments and recommendations to the Secretary of the Department of Health and Human Services on proposals for physician-focused payment models submitted by individuals and stakeholder entities

Len was an advisor to the Virginia Health Reform Initiative and is now the payment reform advisor to the Virginia Center for Health Innovation as it leads Virginia’s State Innovation Model effort. As he has come to focus his research more on payment and delivery reform, Len was an Innovation Advisor to the Center for Medicare and Medicaid Innovation at CMS, and is now the Principal Investigator on Patient Centered Medical Home evaluation studies as well as more general ways to use payment and delivery reform to achieve triple aim and health equity goals. Len’s first job was teaching economics at Wellesley College from 1980-1991, where he became Associate Professor and Economics Department Chair, after receiving his Ph.D. in Economics from the University of Illinois in 1980. Len got his B.A. from Hendrix College in Conway, Arkansas, and his M.A. in Economics from the University of Arkansas in Fayetteville.

**Kristie Kulinski** is an Aging Services Program Specialist at the Administration for Community Living/Administration on Aging (ACL/AoA) within the U.S. Department of Health and Human Services. Ms. Kulinski serves as the team lead for ACL/AoA’s chronic disease self-management education (CDSME) initiative. Prior to joining
Kathleen A. Cameron has over 25 years of experience in the health care field as a pharmacist, researcher and program director focusing on falls prevention, geriatric pharmacotherapy, mental health, long-term services and supports, and caregiving. Ms. Cameron is currently Senior Director at the National Council on Aging (NCOA) where she oversees the Administration on Aging-funded National Falls Prevention Resource Center and National Chronic Disease Self-Management Education (CDSME) Resource Center. The focus of this work is to support the expansion and sustainability of evidence-based health promotion and disease prevention programs in the community and online through collaboration with national, state, and community partners.

Ms. Cameron was previously with JBS International as director of a SAMHSA-funded technical assistance center aimed at educating the aging network, mental health providers and policy makers about behavioral health conditions among older adults. Ms. Cameron worked as a consultant to various aging and health care organizations in the Washington DC area from 2005-2014. She served as Executive Director of the American Society of Consultant Pharmacists Research and Education Foundation from 2000-2004. In this capacity, she was responsible for successfully directing and securing support for the Foundation’s federally and privately-funded research and education programs and initiatives, which are intended to improve the health and well-being of older adults through appropriate, effective, and safe use of medications.

Ms. Cameron received her BS degree in pharmacy from the University of Connecticut and her Master of Public Health degree from Yale University. The topic of her Master’s thesis was medication use and risk of falling among community-dwelling older adults.

Sue Lachenmayer, MPH, CHES is currently the State Program Coordinator for MAC-Living Well Center of Excellence (LWCE) with over 24 years of knowledge and expertise in training, implementing, evaluating and sustaining evidence-based healthy aging/self-management programs. She worked previously overseeing program implementation across New Jersey for the Department of Health and Senior Services and more recently, she served as Senior Director of the NCOA Center for Healthy Aging Technical Assistance Center. The LWCE recently received grants from the U.S. Administration on Aging to expand and sustain Chronic Disease Self-Management Education and Falls Prevention programs across the state of Maryland.

Tim McNeill, MPH, BSN is an independent healthcare consultant, specializing in health program development and sustainability. His customers have included the U.S. Department of Health and Human Services (HHS), U.S. Administration on Aging
Administration for Community Living (ACL). Under a HHS/ACL contract, Mr. McNeill has been the lead technical assistance provider to establish integrated networks of LTSS providers in 26 States.

Mr. McNeill has started or expanded multiple sustainable health programs including community-based free clinics, Federally Qualified Health Centers, two Medicare Shared Savings Program Accountable Care Organizations (ACOs), and LTSS networks. He has successfully negotiated contracts for beneficiary care management and disease self-management education programs between community-based organizations (CBOs) and Managed Care Organizations (MCOs), Medicare Advantage Plans, Accountable Care Organizations (ACOs), and health systems. He has expertise in program evaluation (Process and Outcome), contract negotiations, health insurance payer model design, & health insurance payer risk.

Mr. McNeill is a Registered Nurse with a Bachelor’s degree from Howard University and a Masters of Public Health from Eastern Virginia Medical School. Mr. McNeill is also a U.S. Navy Nurse Corps Veteran.

Rob Schreiber, M.D., CMD is Medical Director of Evidence-based Programs at Hebrew SeniorLife and Medical Director of the Healthy Living Center of Excellence, an organization funded by the John A. Hartford Foundation and the Tufts Health Plan Foundation. The purpose of this collaborative is to disseminate evidence based programs throughout the Commonwealth of Massachusetts with the goal of building a sustainable business model. Dr. Schreiber is also working as a geriatric consultant in a Patient Centered Medical Home for an Accountable Care Organization and is helping the organization develop a population based approach to the frail complex older patient.

He served as Physician-in-Chief and CMO of Hebrew SeniorLife in Boston MA from 2004 to 2012 and provided oversight of the Hebrew SeniorLife Medical Group, which offers primary and specialty care services to older adults. He is also involved in promoting new initiatives, including new models of care at HSL’s long-term care facilities, continuing care retirement communities, and senior housing sites Prior to joining HSL, Dr. Schreiber served as chairman of geriatrics at Lahey Clinic and held leadership positions at several Boston area long-term care facilities.

In his current role, he is a faculty member of the Institute for Aging Research at Hebrew SeniorLife and is working to connect research to health care systems clinical venues. He serves on the faculty at Harvard Medical School. Dr. Schreiber’s interests focus on prevention and wellness strategies for older adults in ambulatory settings and post acute care in the community. He has been actively engaged in developing new models and approaches of care for older adults in various clinical settings. He is a Senior Leader of the Practice Change Leaders Program which mentors physicians, nurses and social workers improve the care of older adults in their health systems.

Adriel Bettelheim is the health care editor at POLITICO and part of a 14-person team covering the politics and policy surrounding the U.S. health system. He previously held senior editor and reporter positions at CQ Roll Call, Bloomberg, PolitiFact and The
Denver Post and was part of the PolitiFact team awarded the 2009 Pulitzer Prize for National Reporting. He holds a bachelor’s degree in chemistry from Case Western Reserve University and had two stints as a research assistant on molecular genetics projects at the National Institutes of Health. He is author of “Medicare Revolution” (CQ Roll Call e-book) and “Aging in America: A to Z” (Sage).

Sharon Parrott is a Senior Fellow and Senior Counselor at the Center on Budget and Policy Priorities. Parrott brings to the Center’s leadership team deep expertise in poverty and economic opportunity as well as the federal budget and low-income programs and will help advance the Center’s priorities across a range of policy areas. Parrott rejoined the Center in 2017 after serving for two years as Associate Director for the Education, Income Maintenance, and Labor (EIML) Division at the Office of Management and Budget (OMB).

At OMB she had budget and oversight responsibilities for the Departments of Labor and Education, the Social Security Administration, the human services programs at the Department of Health and Human Services, including Older Americans Act programs within the Administration on Aging, and the nutrition programs at the Department of Agriculture. As Associate Director, Parrott helped design budget and policy proposals, craft regulations, implement programs, and address management and budget challenges in these agencies.

Parrott previously worked at Center from 2012 to 2014 as Vice President for Budget Policy and Economic Opportunity, focusing on the impact of budget and tax policy on the nation’s efforts to reduce poverty and hardship and promote economic opportunity.

Before then, she served as Secretary Sebelius’ Counselor for Human Services Policy at the U.S. Department of Health and Human Services (HHS) from August 2009 until November 2012. At HHS, Parrott was a lead advisor on human services issues. Parrott previously worked at the Center from 1993 through August 2009.

Parrott has been quoted in such publications as the New York Times, Washington Post, Boston Globe, Atlantic Monthly, Wall Street Journal, and the Associated Press and has appeared on television, including The Newshour with Jim Lehrer. She received both her B.A. in Economics and master’s degree in Social Work from the University of Michigan.

Elizabeth Hagan is Associate Director of Coverage Initiatives at Families USA, where she focuses on enrollment policy. In this position, she works with national and state partners to identify and disseminate promising practices related to outreach and enrollment in Medicaid, the Children’s Health Insurance Program (CHIP), and health insurance marketplaces. She also provides technical assistance on application- and enrollment-related issues to assisters across the country.

Prior to joining Families USA, Ms. Hagan was a policy analyst with Enroll America, a nonprofit, nonpartisan organization working to maximize the number of Americans who enroll in and retain health coverage. There, she worked in the Best Practices Institute, focusing primarily on improving outreach and enrollment in Medicaid and CHIP.
Ms. Hagan holds an MPA from George Washington University and a BA from Ohio State University.

**David A. Lipschutz** joined the Center for Medicare Advocacy in June 2010. Mr. Lipschutz engages in public policy issues surrounding Medicare and related coverage as they impact Medicare beneficiaries. This work includes federal administrative and legislative advocacy, collaboration with other consumer advocates to address systemic issues, and monitoring, analyzing and commenting on current Medicare-related policy developments. He is also a contributing author to the Center’s Medicare Handbook. Mr. Lipschutz came to the Center after 5 years as a staff attorney at California Health Advocates (CHA), a nonprofit organization that provides advocacy and education for California Medicare beneficiaries. Before joining CHA, Mr. Lipschutz worked as a staff attorney at the Center for Health Care Rights, a non-profit agency that provides direct services to Medicare beneficiaries in Los Angeles County. From 2003 to 2010, Mr. Lipschutz co-authored a chapter on Medicare in California’s Continuing Education of the Bar (CEB) publication California Elder Law, Resources, Benefits, and Planning.

Mr. Lipschutz is an attorney licensed in California and Connecticut, and earned his B.A. degree from University of California, Santa Cruz in 1993 and his J.D. degree from University of California, Davis in 1999.

**Hemi Tewarson** serves as acting director for the NGA Center for Best Practices’ Health Division. Tewarson oversees projects centering around Medicaid transformation and coverage, Medicaid data systems, state leadership and health care delivery and payment system reform.

Prior to joining NGA, Tewarson served as senior attorney for the Office of the General Counsel at the U.S. Government Accountability Office (GAO). There she advised the health care team in the preparation of reports and testimonies for the Congress on a broad range of issues, with a particular focus on Medicaid. Prior to GAO, Tewarson was in private practice as a health policy attorney in Washington, D.C., at Powell Goldstein, LLP and McDermott, Will & Emery where she advised states, associations, hospitals and health systems and other providers across the country on a broad range of issues. One focus of her practice was working with state officials on reforming their Medicaid programs. Tewarson also served as chair and elected member of the D.C. Bar Health Law Steering Committee.

Tewarson holds a J.D. and a master’s degree in public health from the George Washington University and a bachelor’s degree in psychology from the University of Pennsylvania. Hemi originally hails from Massachusetts.

**Matt Salo** was named Executive Director of the National Association of Medicaid Directors (NAMD) in February 2011. The association represents all 56 of the nation’s state and territorial Medicaid Directors, and provides them with a strong unified voice in national discussions as well as a locus for technical assistance and best practices.
Matt formerly spent 12 years at the National Governors Association, where he worked on the Governors’ health care and human services reform agendas, and spent the 5 years prior to that as a health policy analyst working for the State Medicaid Directors as part of the American Public Human Services Association.

Matt also spent two years as a substitute teacher in the public school system in Alexandria, VA, and holds a BA in Eastern Religious Studies from the University of Virginia.

**Robert Kellerman** is the Executive Director of the Greater Wisconsin Agency on Aging Resources which is the Area Agency on Aging that supports and funds aging programs in seventy Wisconsin counties and all of the eleven Wisconsin Tribes. Prior to working with Area Agencies on Aging, Mr. Kellerman was the Director of the Manitowoc County Aging Resource Center for seventeen years after serving as the Director of a multi-county Elderly Nutrition Program in Northern Wisconsin. He is the President of the WI Association of Area Agencies on Aging and is a member of the National Association of Area Agencies on Aging Board of Directors. Mr. Kellerman holds a Bachelor of Science Degree from the University of Wisconsin in Stevens Point.

**Janet Zander** has been serving as the Advocacy and Public Policy Coordinator for the Greater Wisconsin Agency on Aging Resources (GWAAR) for the past four years. In this role, she coordinates the agency’s advocacy and public policy objectives and works to maintain a culture of advocacy within the organization and the county and tribal aging units within the 70 counties and 11 tribes in its service area. Through her involvement with the Wisconsin Aging Advocacy Network, she is active in statewide advocacy efforts with and for older adults. Prior to joining the GWAAR team, Ms. Zander was employed with the Aging & Disability Resource Center (ADRC) of Portage County for 20 years, 16 of which she served as the Director. Janet’s previous experience includes serving as the Director of Social Services for a private skilled nursing facility, managing a group home for people with serious mental illness and working for a community action agency.

**Bob Cleveland** has more than 27 years of experience in working with older adults. He started in the aging field in the activity department and then became the Social Services Director for a continuing-care retirement community in his hometown of Rockford, Illinois. He left the CCRC to work for the Northwestern Illinois Area Agency on Aging for 15 years before deciding to relocate to North Carolina. He and his wife moved to the Charlotte area where they co-managed an independent retirement facility, but his love for making a difference in the broader community led him to the Piedmont Triad Regional Council Area Agency on Aging. He currently serves as a Program Planner for Aging for six counties and leads the region’s efforts around advocacy and legislative issues.

**Dan Berger** currently serves as the Acting Assistant Secretary for Aging and Acting Administrator of the Administration for Community Living (ACL), assuming both roles in February 2017.
Mr. Berger has served in the position of Deputy Administrator for Management and Budget in ACL since its creation in April 2012. ACL brings together the federal government’s work on behalf of older adults and people with disabilities. From the beginning, ACL was based on a commitment to one fundamental principle — that people with disabilities and older adults should be able to live independently and participate fully in their communities. ACL works with states, tribes, community providers, researchers, universities, nonprofit organizations, businesses and families to achieve that vision.

As Deputy Administrator for Management and Budget, he serves as the Executive Officer and Chief Financial Officer and oversees the administration of ACL’s financial resources; discretionary and mandatory grants; information technology and telecommunications; procurement and facilities services; personnel and human capital development; and internal control activities. Under his leadership, the Center is responsible for improving the efficiency and effectiveness of ACL’s operations and providing effective administrative services to support ACL’s programs.

Prior to assuming his current position, Mr. Berger served in a variety of budget and management positions in the Department. Management positions at the Administration on Aging included Director of the Center for Management and Budget, Director of the Office of Management Analysis and Resources, and Director of the Office of Information Resources Management. He entered Federal service as a Presidential Management Fellow in 1997 and spent 8 years as a budget analyst in the Office of the Secretary and AoA.

He received a Master of Public Administration degree from Northeastern University and bachelor’s degrees in history and politics from Brandeis University. He resides in Fairfax, Virginia with his wife and three children.

Edwin Walker is the Deputy Assistant Secretary for Aging of the Administration on Aging (AoA) within the Administration for Community Living. Mr. Walker serves as the chief career official for the federal agency responsible for advocating on behalf of older Americans.

In this capacity, he guides and promotes the development of home and community-based long-term care programs, policies and services designed to afford older people and their caregivers the ability to age with dignity and independence and to have a broad array of options available for an enhanced quality of life. This includes the promotion and implementation of evidence-based prevention interventions proven effective in avoiding or delaying the onset of chronic disease and illness.

A strong and experienced advocate for older persons, he has served as the primary liaison with Congress on legislation related to aging services and programs. For more than 30 years, he has been characterized as a consummate professional civil servant who can be relied upon to represent the best interests of our nation’s senior citizens.
Prior to joining the Administration on Aging, Mr. Walker served as the Director of the Missouri Division of Aging, responsible for administering a comprehensive set of human service programs for older persons and adults with disabilities. He received a Juris Doctor degree in law from the University of Missouri-Columbia School of Law and a Bachelor of Arts degree in Mass Media Arts from Hampton University. A proud grandfather, he resides in Fort Washington, Maryland.

**Adrea Turner** is the Director of Transportation for America (T4America). Prior to coming to T4America, Adrea Turner was Chief of Staff for the District Department of Transportation in Washington, DC. In that role she managed day-to-day and strategic operations of the 900-person department, a $600 million annual budget and a portfolio of highways, local streets, traffic signals, public space, parking assets and a growing city-owned public transportation system that includes bus, bikeshare, and streetcar programs. She also managed personnel, operations, policy, and administrative issues with emphasis on intergovernmental and community relations.

Previously, Adrea served as a Senior Associate for State Policy in the Fiscal and Economic Policy division at the Pew Charitable Trusts, working with elected and appointed state leaders to maximize data-driven and outcome-focused program management and to promote the use of evidence in budget and policy deliberations, and also with the State of Maryland as both a Senior Analyst in the Office of Governor Martin O’Malley and as a Special Assistant to the Secretary of the Maryland Department of Transportation, where she focused on multimodal transportation solutions and transit-oriented development.

Early in her career, she produced community events for the City of Greenville in Greenville, SC, and served in a policy analysis and government relations role for the Lowcountry Housing Trust in Charleston, SC. She holds a Bachelor of Science degree in Psychology and a Master’s in Public Administration, both from the College of Charleston in South Carolina.

**Linda Couch** is the Vice President of Housing Policy at LeadingAge. In this capacity, she directs the development of housing policy priorities, including identifying and analyzing various policy proposals, monitoring and examining federally assisted elderly housing policies and maintaining regular communication with the Department of Housing and Urban Development and other relevant federal agencies. She works with the Vice President, Legislative Affairs, the Director, Grassroots and Member Engagement, and the Senior Vice President, Congressional Affairs and Housing to develop and implement advocacy efforts to educate and persuade opinion-leaders on LeadingAge’s policy goals.

**Bob Blancato** is the President of Matz, Blanchot and Associates, the National Coordinator of the bipartisan 3000-member Elder Justice Coalition, and the Executive Director of the National Association of Nutrition and Aging Services Programs. Bob has more than 20 years of service in the Congressional and Executive branches, including the senior staff of the U.S. House Select Committee on Aging and an appointment by President Clinton to be Executive Director of the 1995 White House Conference on
Aging. Most recently, Bob is the Chair of the Board of the American Society on Aging and on the National Board of AARP. He also serves on the Board of the National Council on Aging and the Advisory Panel on Outreach and Education of the Centers for Medicaid and Medicare Services. He was recently selected by Next Avenue as a 2016 Influencer in Aging. Bob is a contributing blogger to the Huffington Post and Next Avenue, writing on aging issues. He holds a BA from Georgetown University and an MPA from American University. Bob has won numerous awards for advocacy including being knighted by the Italian Republic in 2011.
CONGRESSIONAL VISIT TIPS

Meeting face to face with your Members of Congress and/or their staff members is one of the most effective advocacy tools at your disposal. Here are a few quick tips to help you make your congressional visit a success.

Be Prompt
- Try to be on time for all your meetings, even though they may keep you waiting. Schedules change quickly on Capitol Hill, but you want to be reliable and courteous. If your other meetings run long, call the next office to let them know you are running late.

Be Patient
- Be prepared to encounter changes at the very last minute. A visit with a Member may suddenly turn into a meeting with staff. Be gracious and go with the flow.
- You never know where a Hill meeting might be held—from a Senator’s grand office to a hallway to the building’s cafeteria!
- Treat everyone you encounter as a potential ally. Congressional staff may be young and may not know a lot about your issues, but they are gatekeepers to your Member and could end up being your best point of contact. See your meeting as an opportunity to build relationships with your Member’s office.

Be Prepared
- Have your talking points ready and know what you want to cover in the meeting. But also remember that you will need to be flexible—if you end up with less time than you planned for, give them the short version.
- In a group visit, be sure to plan in advance who will say what in the meeting.
- Leave behind materials that can be helpful to staff, like short fact sheets, stats on your PSA, etc. [Bring one n4a Policy Priorities packet plus your own agency information to each meeting.]

Be Persuasive
- Be clear about what you are asking for (e.g., increased appropriations) and why it is needed. Everyone comes to lawmakers asking for more federal dollars, and it is an especially challenging time right now, so you need to make the best possible case.
- Know your audience. Consider these and other factors as you plan your remarks:
  - BACKGROUND: It’s okay to ask a staffer how much they know about the Older Americans Act or about the Aging Network at the beginning of the meeting. If they are new to the issues, be sure to explain what a AAA or Title VI program does and how it fits into the larger Aging Network.
FEDERAL FOCUS: While it is important to mention that Older Americans Act dollars leverage state and local funds and that your agency has a variety of funding streams, try to stay focused on federal funding and policy. Your audience of federal lawmakers and their staff want to know how they can help.

LIMITED TIME: Members and even their staff have tremendous workloads and are sometimes at the mercy of floor action or committee schedules. If you are given generous time, go ahead and use it, but be aware that most visits will be rather short so plan your remarks accordingly. A ten-minute visit can still be very effective!

POLITICAL REALITIES: The more you know about your Member and his/her district, philosophy, interests and allegiances, the better you can talk about your work in ways s/he can understand.

- Use numbers. Make the case for why you need additional resources with the hardest numbers possible. (How many individuals are on your waiting lists? Is that an increase over last year? How has sequestration and other federal funding reductions affected your services?)

Be Passionate

- Use anecdotes to bring your programs and services to life. As you know, people respond positively to our mission and often have personal experiences with caregiving or aging in place, but build on this with real life examples of how your agency helps older adults remain in their homes and communities for as long as possible.
- Congressional staff are usually passionate about their work too, so use language that allows them to get excited about your mission and how they and their boss can help you.

Be a Professional Resource

- Ask the Member or staff what you can do for them. If they ask questions you can’t answer, promise you’ll get back to them later. Offer to send them any additional materials or data. Invite them to visit your agency and let them know you welcome their calls if they have any questions about aging policy. Your goal is to become their local aging expert so that you can advocate for what your community needs!
- Be sure to follow up after the visit. Send a thank you note/email and then suggest a next step that will take your current relationship with the Member’s office to a higher level. For example, if the Member has never visited your agency or another site, extend an invite for the next or a future congressional recess (April 7-24 and May 5-15).
- Stay in touch. You now have, at the very least, the name of a staff member who is tasked with following aging issues. When n4a sends out an Advocacy Alert asking you to call or email Congress, cc: that staffer or call them directly with your concerns.

Good luck!
TALKING POINTS FOR ADVOCATES

Advocates need to be prepared to give legislators and their staff persuasive information in a short period of time. To help you make the most of your meetings, n4a has developed the following framework and talking points for you to use on n4a’s Capitol Hill Day and beyond. For background and more information on n4a policy agenda, see our 2017 Policy Priorities.

YOUR TOP PRIORITY

Make sure your Member understands who you are and your organization’s role in providing services to older adults.

- Remember, this is a new Congress and a new Administration. Federal policies and priorities are changing rapidly. The MOST IMPORTANT conversation you can have is ensuring that Members understand what your agency does, who you serve and why the programs you administer are critical to their constituents.
- Be prepared to speak about the older adult demographic realities in your Member’s district or state, both now and the outlook for the future.
- Talk about both the need for and cost-effectiveness of home and community-based services, and share some personal stories or anecdotes about older adults who have been served through your programs.
- Offer to be a resource for their case-managers, who work in the District to solve constituent concerns. Offer to help make their jobs easier when they receive requests from older adults and caregivers!
- Bring some leave-behind informational materials from your agency and from n4a.

Once rapport is established, go through your top asks and priorities and how/why they are important to your agency and to your district/state. Remember, personal stories are powerful! You don’t have to get through all asks. Highlight those most important to you and adjust as time and Member interest demands.

AND DON’T FORGET TO... Extend your Member an open invitation to visit or volunteer at your agency. This one activity can really help build your relationship with the Member, deepen their understanding of your programs, and allow them to realize what a resource you are on aging issues. Mention it while on the Hill, but you will need to follow up in writing with their scheduler. Note: House and Senate will both be in recess April 7-24 and again May 5-15.
YOUR TOP CONGRESSIONAL “ASKS” ➔
Promote Policies that Enable Aging at Home and in the Community

1. **Federal Funding for FY 2017 and 2018: Protect Older Americans Act and other aging programs from cuts!**
   - **THE SITUATION:** There are serious funding threats to Non-Defense Discretionary (NDD) programs. Congress must finish FY 2017 funding; the Bipartisan Budget Agreement (BBA), which temporarily raised discretionary funding levels, expires September 30; and the Trump Administration has proposed deep cuts to NDD programs, which could include OAA programs.
   - **THE ASK:** Lawmakers must protect investments in critical, cost-effective aging programs.
   - **THE REASON:** OAA programs and services provide a 3:1 return on investment. These cost-effective, proven programs leverage money in local communities and provide economic benefits for communities. The alternative to HCBS supported through OAA is expensive institutionalization for many seniors.
   - **SPECIFICALLY:**
     - Support funding for OAA programs that, at a minimum, meets the amounts unanimously approved in the 2016 OAA reauthorization. Pay specific attention to: *Title III B Supportive Services; Title VI Native American aging programs;* and *Title III E National Family Caregiver Support Program.*
     - *In particular, Title III B Supportive Services are in need of funding increases!* Use n4a’s III B Fact Sheet to demonstrate the importance of III B funding and how it allows you to create a wide range of programs and services that are responsive to the needs of older adults in your community.

2. **Reject Policies that Could Harm Vulnerable Older Adults**
   - **THE SITUATION:** During the recent push to repeal and replace the Affordable Care Act, lawmakers considered making deep cuts to Medicaid; raising health care costs for people aged 50-64 and low-income older adults; and rolling back other essential health care services that keep seniors healthy and support aging in their homes and communities.
   - **THE ASK:** Lawmakers must protect Medicaid, Medicare and essential, affordable health care coverage for vulnerable older adults.
   - **THE REASONS:**
     - **Medicaid** funds nearly two-thirds of long-term care across the country. Deep cuts to Medicaid not only jeopardize the lives of our most vulnerable older adults, but will risk reversing progress toward rebalancing LTC away from much more expensive and often unwanted institutionalization and toward providing most cost-effective, efficient, critical care at home and in the community.
     - **Medicare** has made strides toward supporting disease prevention and health promotion programs that keep people healthier and avoid most costly clinical care.
     - **The Affordable Care Act** provides health care to millions of older adults not yet eligible for Medicare. Any proposals that increase the cost of health insurance—especially for low-income older adults—mean that people will forgo preventative and necessary care and ultimately join the Medicare in poorer health and with more expensive needs.

*If you can’t answer a question, don’t worry, just promise to get back to them with the answer when you are back home.* Feel free to put the staffer in touch with n4a’s policy team, Amy Gotwals and Autumn Campbell, who can be reached at 202.872.0888 or agotwals@n4a.org and acampbell@n4a.org.
KEY COMMITTEES
for the 115th Congress, 1st Session

APPROPRIATIONS COMMITTEES FOR OAA

Senate Appropriations Full Committee

REPUBLICANS

Chair: Thad Cochran (MS)
Mitch McConnell (KY)
Richard Shelby (AL)
Lamar Alexander (TN)
Susan Collins (ME)
Lisa Murkowski (AK)
Lindsey Graham (SC)
Roy Blunt (MO)
Jerry Moran (KS)
John Hoeven (ND)
John Boozman (AR)
Shelly Moore Capito (WV)
James Lankford (OK)
Steve Daines (MT)
John Kennedy (LA)
Marco Rubio (FL)

DEMOCRATS

Ranking: Patrick Leahy (VT)
Patty Murray (WA)
Dianne Feinstein (CA)
Richard Durbin (IL)
Jack Reed (RI)
Jon Tester (MT)
Tom Udall (NM)
Jeanne Shaheen (NH)
Jeff Merkley (OR)
Chris Coons (DE)
Brian Schatz (HI)
Tammy Baldwin (WI)
Christopher Murphy (CT)
Joe Manchin (WV)
Chris Van Hollen (MD)

Senate Appropriations Subcommittee on Labor, Health and Human Services, Education, and Related Agencies

REPUBLICANS

Chair: Roy Blunt (MO)
Jerry Moran (KS)
Richard Shelby (AL)
Thad Cochran (MS)
Lamar Alexander (TN)
Lindsey Graham (SC)
Shelley Moore Capito (WV)
James Lankford (OK)

DEMOCRATS

Ranking: Patty Murray (WA)
Richard Durbin (IL)
Jack Reed (RI)
Jeanne Shaheen (NH)
Jeff Merkley (OR)
Brian Schatz (HI)
Tammy Baldwin (WI)
Christopher Murphy (CT)
House Appropriations Full Committee

REPUBLICANS

Chair: Rodney Frelinghuysen (NJ)
Harold Rogers (KY)
Robert Aderholt (AL)
Kay Granger (TX)
Mike Simpson (ID)
John Culberson (TX)
John Carter (TX)
Ken Calvert (CA)
Tom Cole (OK)
Mario Diaz-Balart (FL)
Charlie Dent (PA)
Tom Graves (GA)
Kevin Yoder (KS)
Steve Womack (AR)
Jeff Fortenberry (NE)
Tom Rooney (FL)
Chuck Fleischmann (TN)
Jaime Herrera Beutler (WA)
David Joyce (OH)
David Valadao (CA)
Andy Harris (MD)
Martha Roby (AL)
Mark Amodei (NV)
Chris Stewart (UT)
David Young (IA)
Evan Jenkins (WV)
Steven Palazzo (MS)
Dan Newhouse (WA)
John Moolenaar (MI)
Scott Taylor (VA)

DEMOCRATS

Ranking: Nita M. Lowey (NY)
Marcy Kaptur (OH)
Peter Visclosky (IN)
José Serrano (NY)
Rosa DeLauro (CT)
David Price (NC)
Lucille Roybal-Allard (CA)
Sanford Bishop, Jr. (GA)
Barbara Lee (CA)
Betty McCollum (MN)
Tim Ryan (OH)
C.A. Dutch Ruppersberger (MD)
Debbie Wasserman Schultz (FL)
Henry Cuellar (TX)
Chellie Pingree (ME)
Mike Quigley (IL)
Derek Kilmer (WA)
Matt Cartwright (PA)
Grace Meng (NY)
Mark Pocan (WI)
Katherine Clark (MA)
Pete Aguilar (CA)

House Appropriations Subcommittee on Labor, Health and Human Services, Education, and Related Agencies

REPUBLICANS

Chair: Tom Cole (OK)
Mike Simpson (ID)
Steve Womack (AR)
Chuck Fleischmann (TN)
Andy Harris (MD)
Martha Roby (AL)
Jaime Herrera Beutler (WA)
John Moolenaar (MI)

DEMOCRATS

Ranking: Rosa DeLauro (CT)
Lucille Roybal-Allard (CA)
Barbara Lee (CA)
Mark Pocan (WI)
Katherine Clark (MA)
# Authorizing Committees for OAA

## Senate Health, Education, Labor and Pensions (HELP) Full Committee

**REPUBLICANS**

<table>
<thead>
<tr>
<th>Chair: Lamar Alexander (TN)</th>
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<tbody>
<tr>
<td>Michael Enzi (WY)</td>
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<td>Richard Burr (NC)</td>
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**DEMOCRATS**

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<tr>
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## Senate HELP Subcommittee on Primary Health and Retirement Security

**REPUBLICANS**

<table>
<thead>
<tr>
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## House Full Committee on Education & the Workforce

**REPUBLICANS**

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<th>Chair: Virginia Foxx (NC)</th>
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<tbody>
<tr>
<td>Joe Wilson (SC)</td>
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**DEMOCRATS**

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<td>Susan Davis (CA)</td>
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Glenn Grothman (WI)  
Steve Russell (OK)  
Elise Stefanik (NY)  
Rick Allen (GA)  
Jason Lewis (MN)  
Paul Mitchell (MI)  
Tom Garrett (VA)  
Lloyd Smucker (PA)  
Drew Ferguson (GA)  

Mark DeSaulnier (CA)  
Donald Norcross (NJ)  
Lisa Blunt Rochester (DE)  
Raja Krishnamoorthi (IL)  
Carol Shea-Porter (NH)  
Adriano Espaillat (NY)

House Education & the Workforce Subcommittee on Higher Education and Workforce Training

REPUBLICANS

Chair: Brett Guthrie (KY)  
Glenn Thompson (PA)  
Lou Barletta (PA)  
Luke Messer (IN)  
Bradley Byrne (AL)  
Glenn Grothman (WI)  
Elise Stefanik (NY)  
Rick Allen (GA)  
Jason Lewis (MN)  
Paul Mitchell (MI)  
Tom Garrett (VA)  
Lloyd Smucker (PA)

DEMOCRATS

Ranking: Susan Davis (CA)  
Joe Courtney (CT)  
Alma Adams (NC)  
Mark DeSaulnier (CA)  
Raja Krishnamoorthi (IL)  
Jared Polis (CO)  
Gregorio Sablan (NMI)  
Mark Takano (CA)  
Lisa Blunt Rochester (DE)  
Adriano Espaillat (NY)

OTHER

Senate Special Committee on Aging

REPUBLICANS

Chair: Susan Collins (ME)  
Orrin Hatch (UT)  
Jeff Flake (AZ)  
Tim Scott (SC)  
Thom Tillis (NC)  
Bob Corker (TN)  
Richard Burr (NC)  
Marco Rubio (FL)  
Deb Fischer (NE)

DEMOCRATS

Ranking: Bob Casey (PA)  
Bill Nelson (FL)  
Sheldon Whitehouse (RI)  
Kirsten Gillibrand (NY)  
Richard Blumenthal (CT)  
Joe Donnelly (IN)  
Elizabeth Warren (MA)  
Catherine Cortez Masto (NV)
n4a Capitol Hill Day
Tuesday, April 4
Washington, DC

Tips
From Union Station, it is a 10-minute gradual uphill walk to reach the Senate office buildings and a 25-minute walk to the House office buildings.

If you are coming from another part of town, the House offices are best reached via the Metro's Orange and Blue Lines at the Capitol South station.

Allow 10 minutes to get between one chamber's buildings; 25 minutes if you need to cross from one side of the Hill to the other. Most buildings have floor plans posted on the wall near major entrances and directional signs posted throughout.

Cafeterias
House
Longworth (Sub-basement)
Rayburn (Sub-basement)

Senate
Dirksen (Basement)
Restaurant Guide

Eating out in Washington, DC can be an adventure so we’ve compiled a short list of possibilities for you. *Caveat:* “Mid-priced” in DC (approx. $15-$25 entrees) might be considered “expensive” elsewhere, and the DC restaurant tax is 10%. *Bon Appetit!*

**Close at Hand: Capitol Hill**

There is a range of dining options within walking distance of the Liaison Capitol Hill Hotel.

If you are looking for quick, inexpensive bite to eat, you will have many choices at **Union Station**, either on the main level by the Metro entrance (burritos, salads, sandwiches, sushi, Mediterranean) or the lower-level food court. There are also a handful of **sit-down restaurants in Union Station**, including *Pizzeria Uno*, *East Street Café* and *Thunder Grill* on the main and second floors.

For those seeking sustenance between Hill visits, the **congressional cafeterias** are closest (see map on reverse). **Union Station** options (see above), **Union Pub** (201 Mass. Ave) or any other restaurants along that stretch of Mass Ave., NE will work well between Senate visits, and **Tortilla Coast** (mid-priced Tex-Mex, 400 First Street, SE), **Bullfeathers** (right next door; burgers) or the restaurants along Pennsylvania Ave., SE are options for those on the House-side of the Hill.

**Other Nearby Options:**

If you want to eat where the locals eat, check out Barracks Row (8th St., SE south of Penn Ave.), Eastern Market (7th St., SE north of Penn Ave.), or H St., NE (accessible via the opened DC Streetcar, which you can ride for free, that picks up behind Union Station). These neighborhoods are a quick cab ride (10 mins) or a longer walk (25-30 mins) from the Liaison Hotel. Each area offers a variety of local dining options for all tastes.

**Venturing Out: On the Metro’s Red Line**

**Gallery Place Metro Stop:**

Museums, restaurants and entertainment abound at Gallery Place. You will find two long blocks full of inexpensive to mid-range casual dining on 7th Street, NW, just across from the Verizon Center, between F and H Streets (e.g., Irish pubs, tapas, hamburgers, burritos). Or walk east on H Street from 7th Street and explore DC’s **Chinatown**. For something a little fancier, go two blocks north of Chinatown to *Farmers and Distillers*, featuring upscale American-inspired fare, at the corner of 6th St. and Massachusetts Ave., NW.

**Farragut North/Dupont Circle Metro Stop:**

This area has ample eating opportunities if you are willing to walk a few blocks. n4a staff favorites include, but are definitely not limited to, **Tabard Inn Restaurant** (located at the back of the boutique hotel), a few blocks north of Farragut North metro at 1739 N St., NW; and **Lauriol Plaza** for a trendy take on Latin/Mexican dishes at 1835 18th St., NW, which is a short 5-minute walk from the Dupont Circle North Metro entrance. **Kramerbooks & Afterwards**, which is on Dupont Circle at 1517 Connecticut Ave., NW, is also a unique and fun place for good food.
ATTENDEE LIST

Kenneth Adkins  
LifeStream Services Inc.  
Yorktown, IN  
akadkins@lifestreaminc.org

Jennifer Adu  
District of Columbia Office on Aging  
Washington, DC  
jennifer.adu@dc.gov

Nalani Aki  
City and County of Honolulu Elderly Affairs Division  
Honolulu, HI  
naki@honolulu.gov

Chuck Alderson  
Direction Home Akron Canton Area Agency on Aging & Disabilities  
Uniontown, OH  
calderson@directionhomeakroncanton.org

Holly Anderson  
Deep East Texas Council of Governments/AAA  
Jasper, TX  
handerson@detcog.org

Kevin Anderson  
Los Angeles County AAA  
Los Angeles, CA  
kanderson@css.lacounty.gov

Laurai Atcitty  
Inter-Tribal Council of Arizona Inc.  
Phoenix, AZ  
laurai.atcitty@itcaonline.com

Cynthia Banks  
Los Angeles County AAA  
Los Angeles, CA  
cbanks@css.lacounty.gov

Cynthia Banks  
Los Angeles County AAA  
Los Angeles, CA  
cbanks@css.lacounty.gov

Mary Beals-Luedtka  
Area Agency on Aging - NACOG  
Flagstaff, AZ  
mluedtka@nacog.org

Orion Bell  
CICOA Aging & In-Home Solutions Inc.  
Indianapolis, IN  
obell@cicoa.org

Frances Benson  
Union County Division on Aging  
Elizabeth, NJ  
fbenson@ucnj.org

Connie Benton Wolfe  
Aging & In-Home Services of Northeast Indiana Inc.  
Fort Wayne, IN  
cbwolfe@agingihs.org

Donna Bileto  
Area Agency on Aging for Lincolnland  
Springfield, IL  
dbileto@aginglinc.org

Mary Blumberg  
Atlanta Regional Commission Area Agency on Aging  
Atlanta, GA  
mblumberg@atlantaregional.com

Kathryn Boles  
Valley AAA  
Flint, MI  
kboles@valleyaaa.org
**Jacqi Bradley**  
Area Agency on Aging 3  
Lima, OH  
jbradley@psa3.org

**Lisa Bretz**  
AAA for North Florida Inc.  
Tallahassee, FL  
lisab@aaanf.org

**Paul Bridgewater**  
Detroit AAA  
Detroit, MI  
bridgetwaterp@daaa1a.org

**Lyn Briel**  
Region 3B Area Agency on Aging  
Battle Creek, MI  
briella@thornapplemanor.com

**Yaushica Brown**  
Valley AAA  
Flint, MI  
ybrown@valleyaaa.org

**Beverly Brown**  
Area Agency on Aging of East Texas  
Kilgore, TX  
beverly.brown@etcog.org

**January Brown**  
Eastern Carolina Council  
New Bern, NC  
jbrown@eccog.org

**Annetta Brown**  
Upper Coastal Plain Council of Governments  
Wilson, NC  
abrown@ucpcog.org

**Odile Brunetto**  
Montgomery County AAA  
Rockville, MD  
Odile.brunetto@montgomerycountymd.gov

**Sue Burgess**  
Atlanta Regional Commission Area Agency on Aging  
Atlanta, GA  
sburgess@atlantaregional.com

**Linda Burghardt**  
Area Agencies on Aging Association of Michigan  
Lansing, MI  
LBurghardt@comcast.net

**Kelly Butts-Elston**  
Connections Area Agency on Aging Inc.  
Council Bluffs, IA  
kbutts@connectionsaaa.org

**Anthony Cario**  
Area Agency on Aging 11  
Niles, OH  
a.cario@aaa11.org

**Glenn Carlo**  
Denakkanaga Inc.  
Fairbanks, AK  
carlo@denakkanaga.org

**Crystal Carter**  
Clinton County Office for the Aging  
Plattsburgh, NY  
Crystal.Carter@clintoncountygov.com

**Lacey Charboneau**  
AAA of Western Michigan Inc.  
Grand Rapids, MI  
LaceyC@aaawm.org

**Christine Cheronis**  
Chautauqua County Office for the Aging  
Mayville, NY  
CheroniC@co.chautauqua.ny.us

**Alexandra Cisneros**  
AAA of Tarrant County  
Fort Worth, TX  
avalexandra.cisneros@unitedwaytarrant.org

**W. Mark Clark**  
Pima Council on Aging  
Tucson, AZ  
mclark@pcoa.org

**Bob Cleveland**  
Piedmont Triad Regional Council AAA  
Kernersville, NC  
bclleveland@ptrc.org

**Jody Cline**  
Senior and Disability Services Lane COG  
Eugene, OR  
jcline@lcog.org

**Gary Cook**  
Direction Home Akron Canton Area Agency on Aging & Disabilities  
Uniontown, OH  
gcook@directionhomeakroncanton.org
Teresa Cook
Ohio District 5 AAA
Ontario, OH
tcook@aaa5ohio.org

Donna Corrado
New York City Department for the Aging
New York, NY
dcorrado@aging.nyc.gov

Kristy Cottrell
Davis County Senior Services
Farmington, UT
ccottrell@daviscountyutah.gov

Pam Curtis
Senior Resources of West Michigan/AAA
Muskegon, MI
pam@seniorresourceswmi.org

Rob Deane
AAA of Western Michigan Inc.
Grand Rapids, MI
f.r.deane@att.net

Rosanne DiStefano
Elder Services of the Merrimack Valley Inc.
Lawrence, MA
ro@esmv.org

Karen Dorbin
District of Columbia Office on Aging
Washington, DC
Karen.Dorbin@dc.gov

Melody Dowell
Lower Arkansas Valley AAA
La Junta, CO
Melody.Dowell@state.co.us

Erica Drewry
Central Ohio AAA-City of Columbus
Columbus, OH
EDrewry@coaaa.org

Dana Eidson
Southern Alabama Regional Council on Aging
Dothan, AL
dana.eidson@sarcoa.org

Jim Endly
AAA Region 9 Inc.
Cambridge, OH
Jendly@aaa9.org

Jaime Estremera-Fitzgerald
AAA Your Aging and Disability Resource Center
West Palm Beach, FL
JEstremera@YourADRC.org

Annette Eubanks
Mid-East Commission AAA
Washington, NC
aeubanks@mideastcom.org

Karla Fales
Region 3B Area Agency on Aging
Battle Creek, MI
kfales@region3b.org

Mickey Ferrel
Denver Regional Council of Governments
Denver, CO

Erin Fisher
Alpine Area Agency on Aging
Silverthorne, CO
aaa12@nwccog.org

Anna Frank
Denakkanaaga Inc.
Fairbanks, AK
bessette@denakkanaaga.org

Cynthia Freeman
Inter-Tribal Council of Arizona Inc.
Phoenix, AZ
Cynthia.Freeman@itcaonline.com

Gail Garrett
Philadelphia Corporation for Aging
Philadelphia, PA
ggerrett@pcaphl.org

Lee Girard
Multnomah County Aging Disability and Veterans Services Division
Portland, OR
lee.girard@multco.us

Lanelle Godsey
Upper Cumberland AAAD
Cookeville, TN
lgodsey@ucdd.org

Jose Gonzalez
Lower Rio Grande Valley AAA
Weslaco, TX
jgonzalez@lgvvdcc.org
Barbara Gordon
Kentuckiana Regional Planning and Development Agency
Louisville, KY
barbara.gordon@ky.gov

Scott Gossard
Upper Potomac AAA
Petersburg, WV
upaaa@regioneight.org

Julie Govert Walter
North Central-Flint Hills AAA
Manhattan, KS
juliegw@ncfhaaa.com

Annette Graham
Central Plains AAA
Wichita, KS
agraham@sedgwick.gov

Criss Grant
Southeast Tennessee AAAD
Chattanooga, TN
cgrant@sedev.org

Kristen Griffis
Elder Options
Gainesville, FL
giffisk@agingresources.org

Olivia Guerrero
Pinal-Gila Council for Senior Citizens
Casa Grande, AZ
oliviag@pgcsc.org

Ted Hall
White River AAA
Batesville, AR
ted.hall@wraaaa.com

Jennifer Hallum
AAA of Western Arkansas Inc.
Fort Smith, AR
areaagency@agingwest.org

Mark Hallum
AAA of Western Arkansas Inc.
Fort Smith, AR

Jennifer Hamilton
LifeStream Services Inc.
Yorktown, IN
jhamilton@lifestreaminc.org

Jillian Hardin
Kerr-Tar Regional Council of Governments
Henderson, NC
jhardin@kerrtarcog.org

Donna Harvey
Northeast Iowa AAA
Waterloo, IA
dharvey@nei3a.org

Joan Hatem-Roy
Elder Services of the Merrimack Valley Inc.
Lawrence, MA
jhatemroy@ESMV.org

Robert Held
Northeast Colorado Association of Local Governments
Fort Morgan, CO
bheld@necalg.com

Dottie Hinkle
AAA for North Florida Inc.
Tallahassee, FL
dottieh@aaanf.org

Stacey Hirst
National Center on Elder Abuse at the Keck School of Medicine of USC
Alhambra, CA
stacey.hirst@med.usc.edu

Linda Irizarry
District of Columbia Office on Aging
Washington, DC
linda.irizarry@dc.gov

Lisa James
Cherokee Nation
Tahlequah, OK
lisa-james@cherokee.org

Jonathan Janowski
Milwaukee County Department on Aging
Milwaukee, WI
jonathan.janowski@milwaukeecountywi.gov

Laura Jett
Mid-East Commission AAA
Washington, NC
ljett@mideastcom.org

Eva Jewell
Weld County AAA
Greeley, CO
ejewell@weldgov.com
<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>City, State</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lorraine Joewono</td>
<td>Bergen County Division of Senior Services</td>
<td>Hackensack, NJ</td>
<td><a href="mailto:ljoewono@co.bergen.nj.us">ljoewono@co.bergen.nj.us</a></td>
</tr>
<tr>
<td>Tammy Jovel</td>
<td>Mid-East Commission AAA</td>
<td>Washington, NC</td>
<td><a href="mailto:tjovel@mideastcom.org">tjovel@mideastcom.org</a></td>
</tr>
<tr>
<td>Mary Lynn Kasunic</td>
<td>Area Agency on Aging Region One</td>
<td>Phoenix, AZ</td>
<td><a href="mailto:kasunic@msn.com">kasunic@msn.com</a></td>
</tr>
<tr>
<td>Janis Keith</td>
<td>Mid-East Area Agency on Aging</td>
<td>Manchester, MO</td>
<td><a href="mailto:jkeith@mid-eastaaa.org">jkeith@mid-eastaaa.org</a></td>
</tr>
<tr>
<td>Robert Kellerman</td>
<td>Greater Wisconsin Agency on Aging Resources Inc.</td>
<td>Madison, WI</td>
<td><a href="mailto:bob.kellerman@gwaar.org">bob.kellerman@gwaar.org</a></td>
</tr>
<tr>
<td>Lynn Kellogg</td>
<td>Region IV AAA</td>
<td>Saint Joseph, MI</td>
<td><a href="mailto:lynnkellogg@areaagencyonaging.org">lynnkellogg@areaagencyonaging.org</a></td>
</tr>
<tr>
<td>Lynn Khoo</td>
<td>District of Columbia Office on Aging</td>
<td>Washington, DC</td>
<td><a href="mailto:lynn.khoo@dc.gov">lynn.khoo@dc.gov</a></td>
</tr>
<tr>
<td>Lynn Kimball</td>
<td>Aging and Long Term Care of Eastern Washington</td>
<td>Spokane, WA</td>
<td><a href="mailto:lynn.kimball@dshs.wa.gov">lynn.kimball@dshs.wa.gov</a></td>
</tr>
<tr>
<td>Sheila Kimmel</td>
<td>Area Agency on Aging 3</td>
<td>Lima, OH</td>
<td><a href="mailto:skimmel@psa3.org">skimmel@psa3.org</a></td>
</tr>
<tr>
<td>Garret King</td>
<td>District of Columbia Office on Aging</td>
<td>Washington, DC</td>
<td><a href="mailto:garret.king@dc.gov">garret.king@dc.gov</a></td>
</tr>
<tr>
<td>Cathy Knight</td>
<td>Washington Association of Area Agencies on Aging</td>
<td>Olympia, WA</td>
<td><a href="mailto:w4a@agingwashington.org">w4a@agingwashington.org</a></td>
</tr>
<tr>
<td>Beth Kowalczyk</td>
<td>Ohio Association of Area Agencies on Aging</td>
<td>Columbus, OH</td>
<td><a href="mailto:kowalczyk@ohioaging.org">kowalczyk@ohioaging.org</a></td>
</tr>
<tr>
<td>Becky Kurtz</td>
<td>Atlanta Regional Commission Area Agency on Aging</td>
<td>Atlanta, GA</td>
<td></td>
</tr>
<tr>
<td>Kristen LaEace</td>
<td>Indiana Association of Area Agencies on Aging</td>
<td>Indianapolis, IN</td>
<td><a href="mailto:klaeace@iaaaa.org">klaeace@iaaaa.org</a></td>
</tr>
<tr>
<td>Brenda Landers</td>
<td>West Virginia State University Metro Area Agency</td>
<td>Dunbar, WV</td>
<td><a href="mailto:landerbr@wvstateu.edu">landerbr@wvstateu.edu</a></td>
</tr>
<tr>
<td>Holly Lange</td>
<td>Philadelphia Corporation for Aging</td>
<td>Philadelphia, PA</td>
<td><a href="mailto:hlane@pcaphl.org">hlane@pcaphl.org</a></td>
</tr>
<tr>
<td>Jonathan Lavin</td>
<td>AgeOptions</td>
<td>Oak Park, IL</td>
<td><a href="mailto:jon.lavin@ageoptions.org">jon.lavin@ageoptions.org</a></td>
</tr>
<tr>
<td>Sherry Leach</td>
<td>Boulder County Area Agency on Aging (BCAAA)</td>
<td>Boulder, CO</td>
<td><a href="mailto:sleach@bouldercounty.org">sleach@bouldercounty.org</a></td>
</tr>
<tr>
<td>Rachel Leidenfrost</td>
<td>Meals on Wheels for WNY</td>
<td>Buffalo, NY</td>
<td><a href="mailto:rleidenfrost@mealsonwheelswny.org">rleidenfrost@mealsonwheelswny.org</a></td>
</tr>
<tr>
<td>Tammy Lemmer</td>
<td>Tri-County Office on Aging</td>
<td>Lansing, MI</td>
<td><a href="mailto:LemmerT@tcoa.org">LemmerT@tcoa.org</a></td>
</tr>
<tr>
<td>Linda Levin</td>
<td>ElderSource Area Agency on Aging for Northeast Florida</td>
<td>Jacksonville, FL</td>
<td><a href="mailto:linda.levin@myeldersource.org">linda.levin@myeldersource.org</a></td>
</tr>
<tr>
<td>Rebecca Liebes</td>
<td>Area Office on Aging of Northwestern Ohio Inc.</td>
<td>Toledo, OH</td>
<td><a href="mailto:rliebes@areaofficeonaging.com">rliebes@areaofficeonaging.com</a></td>
</tr>
</tbody>
</table>
Maureen Linehan  
Seattle Human Services Department Aging and Disability Services  
Seattle, WA  
amaureen.linehan@seattle.gov

Jason Maciejewski  
The Senior Alliance/AAA 1-C  
Wayne, MI  
jmaciejewski@tsalink.org

Shanna Maguffee  
White River AAA  
Batesville, AR  
shanna.maguffee@wraaa.com

Randy Maluchnik  
Metropolitan AAA  
North St. Paul, MN  
rmaluchnik@co.carver.mn.us

Lisa Mancini  
San Mateo County Aging and Adult Services  
San Mateo, CA  
Lmancini@smcgov.org

Mary Marlin  
Upper Coastal Plain Council of Governments  
Wilson, NC  
mmarlin@ucpcog.org

Molly Martin  
Baltimore City Health Department Division of Aging and Care Services  
Baltimore, MD  
Molly.Martin@baltimorecity.gov

William Massey  
Peninsula Agency on Aging Inc.  
Newport News, VA  
ceo@paainc.org

Sharon McConnell  
Denakkanaaga Inc.  
Fairbanks, AK  
mconnell@denakkanaaga.org

Pamela McDaniel  
West Alabama Regional Commission  
Northport, AL  
pam.mcdaniel@westal.org

Charlotte McHenry  
Senior Connection Center  
Tampa, FL  
charlotte.mchenry@agingflorida.com

Shireen McSpadden  
San Francisco Department of Aging and Adult Services  
San Francisco, CA  
Shireen.McSpadden@sfgov.org

Chase Meade-Patton  
Appalachian Agency for Senior Citizens  
Cedar Bluff, VA  
cpatton@aasc.org

Jody Michaelson  
Multnomah County Aging Disability and Veterans Services Division  
Portland, OR  
jody.l.michaelson@multco.us

Clark Miller  
Indian Nations Council of Governments AAA  
Tulsa, OK  
cmiller@incog.org

Abigail Morgan  
Direction Home Akron Canton Area Agency on Aging & Disabilities  
Uniontown, OH  
amorgan@directionhomeakroncanton.org

Timothy Nichols  
Association on Aging in New York  
Albany, NY  
tim@agingny.org

Tom Nolan  
San Francisco Department of Aging and Adult Services  
San Francisco, CA  
tom.nolan@sfgov.org

Jackie O'Connor  
AAA of Western Michigan Inc.  
Grand Rapids, MI  
jackie@aaawm.org

Corally O'Dell  
Region 3B Area Agency on Aging  
Battle Creek, MI  
codell@voyager.net

Joy Paeth  
AgeSmart Community Resources  
Belleville, IL  
JPaeth@AgeSmart.org
Blair Barton Percival
Piedmont Triad Regional Council AAA
Kernersville, NC
bbpercival@ptrc.org

Susan Real
East Central Illinois AAA
Bloomington, IL
sreal@eciaaa.org

Larke Recchie
Ohio Association of Area Agencies on Aging
Columbus, OH
recchie@ohioaging.org

Susan Redman
East Central Illinois AAA
Bloomington, IL
sredman@eciaaa.org

Matthew Reed
Direction Home Akron Canton Area Agency on Aging & Disabilities
Uniontown, OH
mreed@directionhomeakroncanton.org

Caryn Resnick
New York City Department for the Aging
New York, NY
cresnick@aging.nyc.gov

Edith Robbins
Valley AAA
Flint, MI

LeAnn Rolland
Area Agency on Aging 3
Lima, OH
lrolland@psa3.org

David Rosado
Eastern Carolina Council
New Bern, NC
drosado@eccog.org

Cyndi Rossi
Western Reserve AAA
Cleveland, OH
crossi@psa10a.org

Joe Rossi
Area Agency on Aging 11
Niles, OH
j.rossi@aaa11.org

G. Joseph Sample
The Heritage Area Agency on Aging
Cedar Rapids, IA
Joe.Sample@kirkwood.edu

Jayla Sanchez-Warren
Denver Regional Council of Governments
Denver, CO
jswarren@drcog.org

Betsy Sawyer-Manter
SeniorsPlus
Lewiston, ME
bsawyer-manter@seniorsplus.org

Navid Sayed
Detroit AAA
Detroit, MI

Regina Sayers
Appalachian Agency for Senior Citizens
Cedar Bluff, VA
rsayers@aasc.org

Rodney Schroeder
NorthWest Senior & Disability Services
Salem, OR
Rodney.Schroeder@nwsds.org

Kristie Sharp
Atlanta Regional Commission Area Agency on Aging
Atlanta, GA
ksharp@atlantaregional.com

Deborah Silverman
Central Virginia Alliance for Community Living Inc.
Lynchburg, VA
dsilverman@cvcl.org

Dawn Simonson
Metropolitan AAA
North St. Paul, MN
dsimonson@metroaging.org

Luisa Singletary
Ohio District 5 AAA
Ontario, OH
lsingletary@aaa5ohio.org

John Skirven
Senior Services of Southeastern Virginia
Norfolk, VA
jskirven@ssseva.org
Donald Smith
AAA of Tarrant County
Fort Worth, TX
don.smith@unitedwaytarrant.org

Lisa Solley
Area Agency on Aging 11
Niles, OH
l.solley@aaa11.org

Mary Ann Spanos
Chautauqua County Office for the Aging
Mayville, NY
SpanosM@co.chautauqua.ny.us

Tiffany Speas
Peninsula Agency on Aging Inc.
Newport News, VA
cfo@paainc.org

Kay-Anne Spence
District of Columbia Office on Aging
Washington, DC
Kay-Anne.Spence@dc.gov

Donna Sprouse
Deep East Texas Council of Governments/AAA
Jasper, TX
donna.sprouse@detcog.org

Beth Stern
Central Vermont Council on Aging
Barre, VT
bstern@cvcoa.org

Deborah Stone-Walls
Maui County Office on Aging
Wailuku, HI
deborah.stone-walls@co.maui.hi.us

David Sykora
St. Louis AAA
St. Louis, MO
Sykorad@stlouis-mo.gov

Heang Tan
Baltimore City Health Department Division of Aging and Care Services
Baltimore, MD
Heang.Tan@baltimorecity.gov

Crystal Thomas
Cherokee Nation
Tahlequah, OK

Luke Titus
Denakkaanaaga Inc.
Fairbanks, AK
bessette@denakkaanaaga.org

Jamie Ulrich
Weld County AAA
Greeley, CO
ulrichjj@co.weld.co.us

Sky Van Rossum
Greater Wisconsin Agency on Aging Resources Inc.
Madison, WI
Sky.VanRossum@gwaar.org

Christine Vanlandingham
Region IV AAA
Saint Joseph, MI
cvanlandingham@areaagencyonaging.org

Roy Walker
Olympic AAA
Port Hadlock, WA
walkerb@dshs.wa.gov

Dawn Weber
Buckeye Hills AAA
Reno, OH
DWeber@buckeyehills.org

Jennifer Westfall
Buckeye Hills AAA
Marietta, OH
jwestfall@buckeyehills.org

Julie Wetherby
Region 2 AAA
Brooklyn, MI
Julie.Wetherby@r2aaa.net

Julie Wiggins
High Country AAA
Boone, NC
jwiggins@regiond.org

Anne Wildman
Northern Kentucky Area Development District
Florence, KY
Anne.Wildman@nkadd.org

Greg Williams
Kentuckiana Regional Planning and Development Agency
Louisville, KY
Greg.williams@ky.gov
Stacy Wines  
Region 3B Area Agency on Aging  
Battle Creek, MI  
wines@region3b.org

Janet Zander  
Greater Wisconsin Agency on Aging Resources Inc.  
Madison, WI  
janet.zander@gwaar.org

Gregory Zars  
Northeast Iowa AAA  
Waterloo, IA  
gzars@nei3a.org

Holly Zielinski  
SeniorsPlus  
Lewiston, ME  
hzielinski@seniorsplus.org
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