



Heritage

Area Agency on Aging



ANNUAL
REPORT
FY 2020

From the Director

Most of us would agree it has been a year like no other. The beginning of Fiscal Year 2020 was filled with promise and excitement for Heritage Area Agency on Aging.

Becoming a newly designated 501(c)3 and exploring opportunities to grow and develop new programs, while remaining steadfast in our service to Seniors and People with Disabilities, was the culmination of years of hard work and dedication. There was much to celebrate in 2020. The promise of a new chapter for Heritage was alive and well.

As a new Executive Director and the newest member of the team, I was not part of the swift changes that occurred last March at Heritage. Like all of you, however, I witnessed the sudden and unexpected alterations to nearly every aspect of our life and livelihood in our community. These changes were instant and significant for Heritage Area Agency on Aging, as well. Every aspect of service and delivery had to change quickly.

While COVID 19 changed the way Heritage was able to deliver services, it did not change the need; in many ways, the need only increased. But just as in the decades before, Heritage staff not only answered the call to serve, they served above and beyond the call. I have been honored to work alongside the Heritage staff these last 6 months. Many hours have been spent in critical conversations: How can we keep everyone safe while still providing needed support? How do we combat social isolation? How do we maintain valued relationships when we are not able to meet face to face? But compassion and commitment have driven every decision and, just as in years past, quality service to Eastern Iowa's Seniors and People with Disabilities was provided with compassion and expertise.

As a result, we find ourselves looking back at a year with success as well as challenge. Encore Café, along with our other meal providers, transitioned within days to provide frozen or refrigerated meals for pick up “curbside,” keeping Seniors safe and allowing staff to visit with them at pick up sites while staying socially distanced. Health Promotion classes, such as Tai Chi, went virtual to continue to encourage movement even while staying safely indoors. Phone systems were modified immediately to allow staff to answer calls coming into the agency while working from home, with little change to the response time. Staff also increased phone calls to Seniors in need of additional support. And we supported our community partners who continued to provide in-home services to ensure the most vulnerable received the care they need. All along the way, Heritage staff listened to the community and stepped up to provide necessary support creatively, and often, virtually.

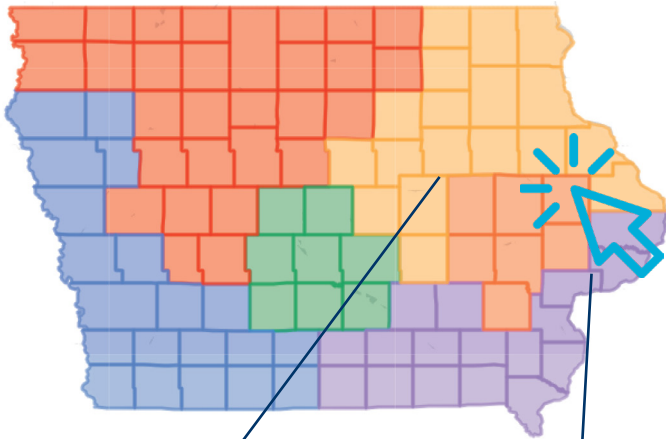
Most importantly, Heritage continued to grow and our staff never lost the hope or the vision we had early in the year, before COVID 19 became part of our lives. This is Heritage’s first Annual Report as an independent 501(c)3. But, it is also the continuation of almost 50 years of service, care, compassion and expertise. I hope you enjoy reading more about our work, and look forward, as I do, to many more years.



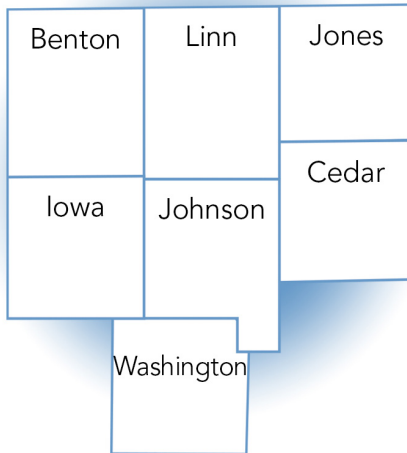
Barbara Werning
Executive Director
Heritage Area Agency on Aging

Who We Are

map: Iowa Dept. on Aging



Established under the Older Americans Act, there are more than 600 Area Agencies on Aging nationwide. Iowa is divided into six regions, each with its own AAA.



Heritage serves Public Service Area 4, a seven-county region in east-central Iowa.

The region is one of Iowa's smallest by size, but is the second-largest by population.

The Heritage Mission

Heritage Area Agency on Aging provides leadership, advocacy and innovative services that improve the quality of life for older Iowans, individuals with disabilities and family caregivers.

The Heritage Vision

Heritage Area Agency on Aging's service region is where optimal aging happens.

Like putting together the pieces of a puzzle, Heritage Area Agency on Aging brings together several programs and services to help each consumer complete their unique plan for independence and improved quality of life.

Heritage cares for the *whole person* by meeting all their needs through the direct and funded services.



Mission Moment

"What a wonderful program! We were having trouble making ends meet and this program has really helped. It allows my husband to get his meals and make his co-pays, and now me as well ... You've made our life easier, happier, and healthier!"

- Kathleen, Encore Café

Program Highlights



Not hundreds, not thousands, and not even tens-of-thousands! More than 350,000 meals were served to older adults through the Heritage **Nutrition Program**. From March to June alone, Heritage also distributed nearly 12 tons of supplemental food, such as bread, dairy, canned goods, and fresh produce.

FY20 saw 50 consumers join evidence-based wellness classes like Tai Chi, Chronic Disease Self-Management and more. When the pandemic hit our region and put a halt to in-person classes, our **Health and Wellness** Coordinator sprang into action with a new series of online Tai Chi classes distributed by the agency and through new partnerships with regional libraries.



A **Case Management** consumer with asthma and sleep apnea needed a new CPAP machine and supplies, but couldn't get one through insurance. With Heritage's person-centered funding, they were approved for the new machine and supplies to get treatment that helped avoid hospitalization. This was just 1 of 49 such requests approved during the year.



The **Elder Rights Program** served more than 175 older adults during FY20. The most common types of abuse reported by referrals or uncovered by Heritage staff were Self-Neglect, Financial Exploitation, and Caregiver Neglect. More than 75 percent of consumers saw their issues resolved during the year, with others still working hard toward resolution.



Elder Rights Cases

- Resolved: 76.6%
- Ongoing: 15.9%
- Refused Assistance: 7.5%

Caregiver Wellness Day – hosted by the **Caregiver Support Program** and other local partners – soared to new heights in November 2019 with a 29% increase in participants and more than 30 local organizations on hand. Nearly 200 caregivers from the Heritage region packed The Hotel at Kirkwood Center for a day of learning, self-care and building relationships with other caregivers.

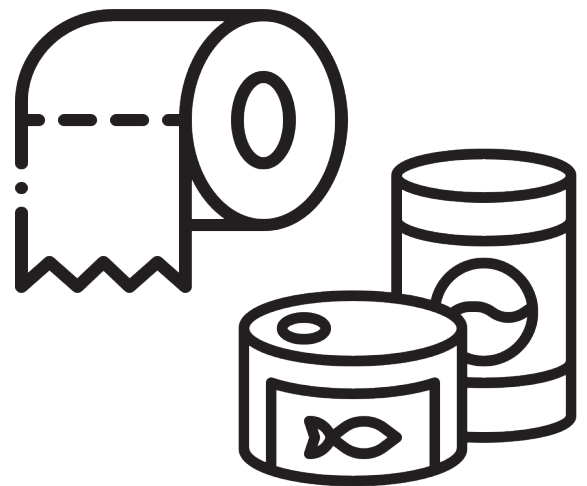




With 11 job placements and more than 20 consumers on that path, the **Older Worker Employment Program** had a busy year. Some consumers returned to their previous field, like the RN who regained certification and was immediately hired at a local hospital. Another landed her dream job – also working in a hospital. Others are crafting their future by honing their crafts, such as painting and woodworking.



At the onset of the COVID-19 pandemic, a consumer called in search of basic needs like toilet paper and paper towels. Heritage's Information Specialist was able to help her locate these items and find some comfort in regular check-ins during quarantine. She was one of more than 1,800 consumers served by the **Information, Referral & Assistance** program throughout the year.



Going the Social Distance

When we stood up from the tables in our conference room in mid-March, everyone packed up their desk. We smiled, waved goodbye and said, "See you in a couple of weeks!" A couple turned into several and weeks turned into months, but still we kept pressing on to maintain the services you depend on.

All around our region, friends sharing a table and a meal at dining locations suddenly found themselves going to drive-thru style food distributions. Services like these were forced to make a lot of changes, but still you kept showing up in support.



Marty (left) and Andy Cutter drop off hundreds of donated food containers to package to-go meals for seniors across the Heritage region



From beautiful sunshine to pouring rain, staff and volunteers set up weekly food distributions to serve Encore Café participants

It may be some time before we know all the long-lasting effects of COVID-19 on daily life, but here's one we've already taken to heart: a heightened feeling of purpose and pride we have serving as your Area Agency on Aging.

Whether it's a meal with friends or meeting with coworkers, the time will come when we can gather around the table again. Until then – with a gloved wave and a masked smile – we're resolved to continue working to improve your quality of life.

Mission Moment

"Thank you for the [grab-and-go] meals ... This has helped me get through these awful weeks of isolation ... Your people are so gracious when putting things in the car that I felt someone did care about me. I am back on track ... God bless you for the gift of food and caring." – Julia, Encore Café Meal Distributions

Our Staff



Barbara Werning
Executive Director



Kellie Elliott-Kapparos
Integrated Services
Director



Jill Sindt
Community Advancement
Director



Brad Franzwa
Fiscal Director



Eugenia Kendall
Quality & Outcomes
Senior Manager



Becky Briggs
Encore Café
Coordinator



Bryan Bruner
Health & Wellness
Coordinator



Sjonna Brunt
Operations Coordinator



Mike Chapman
Project Specialist



Maria Donohoe
Family Caregiver
Coordinator



Drew Floyd
Elder Rights
Specialist



Tim Getty
Regional Nutrition
Coordinator



Angie Guss
Elder Rights Specialist



Kimi Hambright
Options Counselor



Laura Kriegermeier
Elder Rights Coordinator



Ann Neville
Case Manager



Harrison March
Community Engagement
Coordinator



Jennifer Sloan
Finance Coordinator



Paul Swanson
Older Worker
Employment Specialist



Jennifer Walker
Information, Referral &
Assistance Specialist

Not Pictured: Madalyn Klobassa, Information Specialist/Options Counselor;
Ashley Turner, Family Caregiver Specialist/Options Counselor

Our Board

Heritage's inaugural Board of Directors provided leadership and oversight during the agency first year as a non-profit organization. The roster consisted of Supervisors from each county served, a former IDA Director and several other successful professionals.

Larry Kudej, Chair
Retired U.S. Attorney,
Northern District of Iowa

Sr. Susan O'Connor, Vice-Chair
VP of Mission Integration,
Mercy Medical Center

Scott Olson, Secretary
District 4,
Cedar Rapids City Council

Steve Ovel, Treasurer
Board of Trustees,
Kirkwood Community College

Steve Agne
Board of Supervisors,
Cedar County

Mike Barnhart
CEO,
Horizons

Gary Bierschenk
Board of Supervisors,
Benton County

Michelle Buhman
Program Specialist,
Iowa City Senior Center

Toni Claussen
Sales Manager,
Meth-Wick Community

Ro Foege
Former Director,
Iowa Dept. on Aging

Pat Heiden
Board of Supervisors,
Johnson County

Sarah Martinez
Executive Director,
Access2Independence

Matt Piersall
Attorney,
Piersall Law Firm, P.C.

Vicki Pope
Board of Supervisors,
Iowa County

Rose Rennekamp
Board of Trustees,
Kirkwood Community College

Ned Rohwedder
Board of Supervisors,
Jones County

Stacey Walker
Board of Supervisors,
Linn County

Dustie Winkie
Wallace Winkie Foundation

Richard Young
Board of Supervisors,
Washington County

Advisory Council

Area Agencies on Aging across the country utilize the expertise and advice of volunteers on their Advisory Councils. Heritage's Advisory Council is made up of representatives elected by their county's Task Force on Aging, as well as a local elected official.

The group meets with management regularly and has five key focuses: Advocacy, Planning, Communications, Resource Development, Education

Larry Kudej, Chair
Johnson County

Sandra Bell, Vice-Chair
Linn County

Leah Donald
Johnson County

Ed Dunbar
Johnson County

Shirley Geadelmann
Cedar County

Jake Hughes
Linn County

Elizabeth Koehn
Washington County

Sofia Mehaffey
Linn County

John North
Linn County

Nancylee Siebenmann
Linn County

Lisa Tallman
Jones County

Marcia Taylor
Benton County

Evans Waller
Cedar County

Bob Welsh
Johnson County

Barb Young
Linn County

Lynne Cannon
Johnson County

Pat Franzenburg
Benton County

Rep. Art Staed
Elected Official

Mission Moment

"I wanted to let you know that I was able to get the results of Dad's tests ... Yes, he had been evaluated with dementia and can't make any decisions. So yes, we are having a meeting this weekend to decide when he will be moving into memory care ... Words cannot express my appreciation for all the information and help you have given me. Thank you so very much."

- Elder Rights consumer, whose father was in an abusive relationship

By The Numbers

The big issues Heritage AAA addresses require big solutions. In FY20, those solutions led to some big key numbers for our agency.

4,983

unique consumers served

43,898

units of service provided to older adults

\$2.2M

more than \$2.2 million in services funded

Mission Moment

"Since I have been coming, I have been eating more well-rounded, nutritional meals. I have gotten off some of my meds! I enjoy the socializing and it gives me great joy and eagerness to meet new and old friends. I get out of the house a lot more now."

— Marty, Encore Café

1,500+

more than 1,500 volunteer hours by older adults

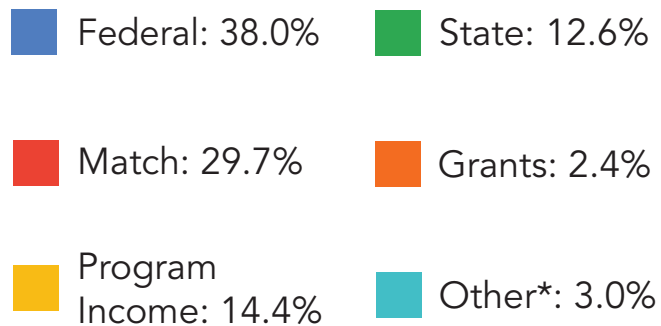
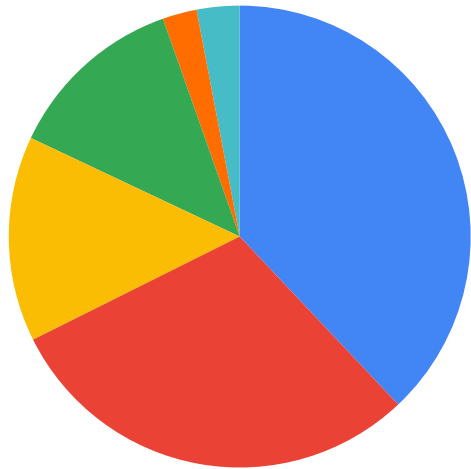
11,440

meals distributed through Encore Café during COVID-19

Fiscal Overview

A financial snapshot of the agency (percentages rounded to nearest tenth)

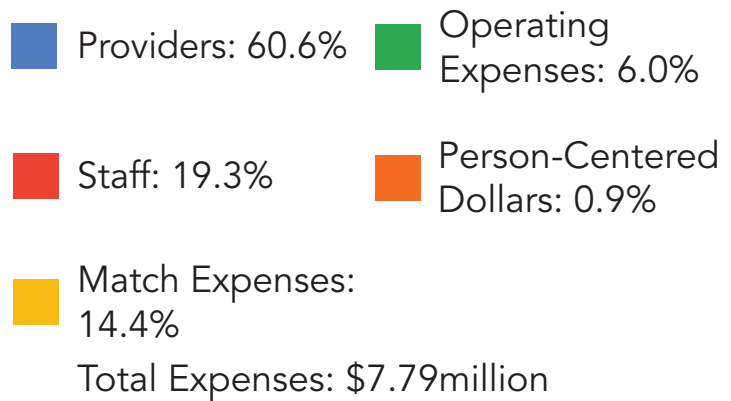
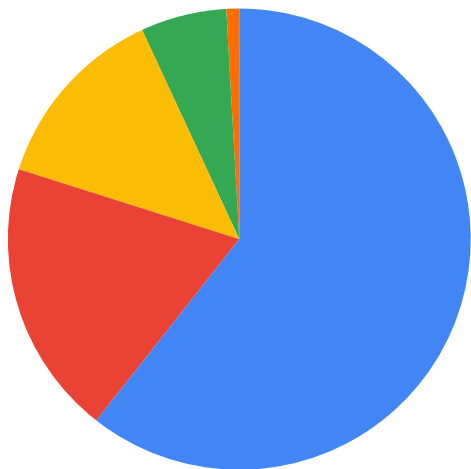
Revenues by Funding Source



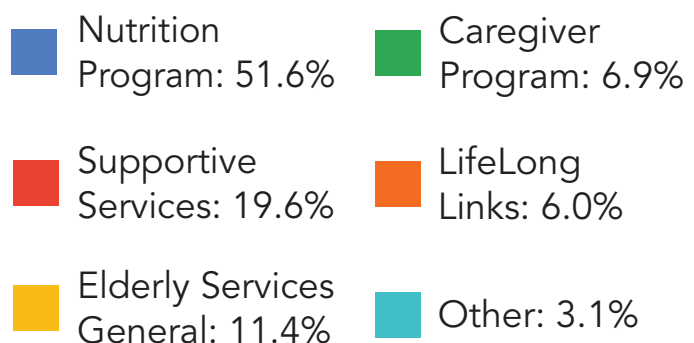
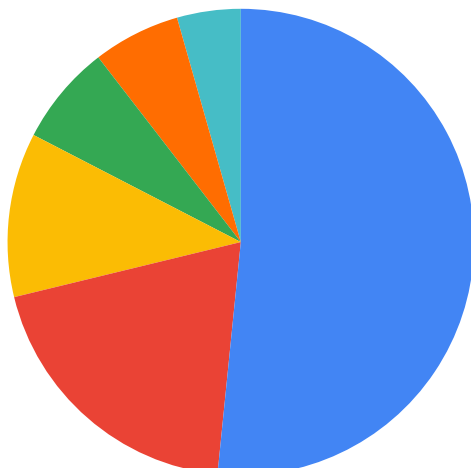
Total Revenues: \$7.96 million

*Other combines Contributions, In-Kind Donations, Investments, and Endowments

Expenses



Expenses by Program (regardless of funding source)



Join Us

It's a fact: America is getting older. The U.S. Census Bureau projects the number of older adults to nearly double by 2060 – that's 95 million older Americans!

As Baby Boomers reach their golden years, the number of seniors here in Iowa and nationwide is causing a new kind of boom: the need for services that empower them to age with dignity and independence.

Join Heritage AAA in creating more Mission Moments



Follow

our Facebook page to stay updated and spread the word

Volunteer

to serve our consumers and see your impact first-hand

Donate

to fund the Heritage mission and empower our consumers



Participate

in a program you're eligible for

1-800-332-5934 • www.HeritageAAA.org 



 Heritage
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