

Agency Report

2022

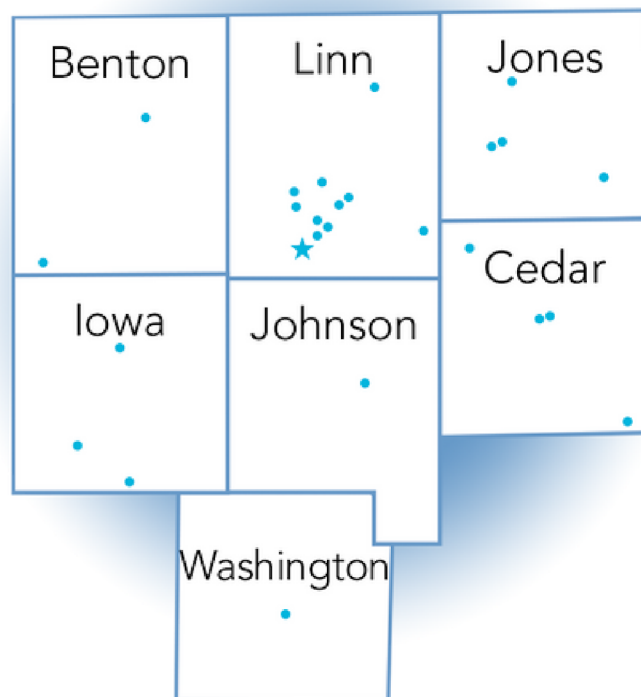
Dignity and independence in the comfort of home

It's what 77 percent* of older adults want and it's what Heritage Area Agency on Aging believes they deserve. But for thousands of older Iowans, their caregivers and adults with disabilities, it's easier said than done.

Heritage is a non-profit organization designated to serve as east-central Iowa's Area Agency on Aging (AAA). Established by the Older Americans Act in 1965, there are more than 600 Area Agencies on Aging nationwide. Iowa is home to six AAAs.

Heritage provides a variety of services that empower independence for adults ages 60+, support caregivers and connect consumers to the care services they need to live in the home they choose.

Heritage also has more than a dozen subcontractors throughout its service region. They further the agency's mission with locally-focused, efficient operations. The map below shows the agency's service region in east-central Iowa. The main office is marked with a star and each dot is a subcontractor or one of their senior dining locations.



*AARP Home and Community Preference Survey, 2021

FROM THE TOP

If there is one word to describe Heritage Area Agency on Aging in 2022, it would be steadfast.

Even as the world around us changed, Heritage staff remained unwavering and resolute in our commitment to older Iowans and adults with disabilities. With COVID-19 almost in the rear-view mirror, many individuals were comfortable returning to face-to-face meetings and welcoming us into their homes again. However, many others were not quite ready to resume a pre-COVID-19 routine, preferring instead online classes or check-in phone calls.

Heritage continued to do what we do best: listening and responding with client-centered and client-driven service, tailoring our approach to meet the unique needs of each individual. A hybrid model became standard practice with some services face-to-face, some virtual, and all in support of an individual plan for healthy aging.

I hope you enjoy the information in the pages that follow. More importantly, I hope you are able to feel the impact of our services. I have had a front row seat to the steadfast compassion and care given by each of our staff and contracted providers. Even in the face of continued change, I cannot help but to feel proud of what we have accomplished and confident the best is yet to come.

Barbara Werning
Executive Director



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THE AGING PUZZLE

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 quality of life.

For some that's one phone call to find a missing piece like a dining site for meals and socialization or a ride to the doctor next week.

For others it may be a long journey from elder abuse recovery or the verge of homelessness, spending years upon years with their case manager until they're stabilized and ready for successful discharge.

However many pieces the consumer has in place, Heritage is here to care for the whole person by meeting all of their needs through the agency's direct and funded services.



The Care Team

When there's something strange about growing old, who are you going to call? Thousands of seniors, caregivers and adults with disabilities know the answer: The Care Team at Heritage!

The Care Team specializes in 1-on-1 support custom-fit for the unique journey each consumer is on. They are the authorities on aging, the counselors on caregiving and the docents of disability support services.

My life preserver! Words cannot express how much a trip to this office did for me, perhaps the tears of relief that streamed from my face as I walked out the door said it all.
- consumer review on Google

The **Information & Assistance** team fielded calls from 2,985 seniors, caregivers and adults with disabilities in search of community resources.

When in-depth help was needed, **Options Counselors** helped 251 seniors create and enact their plan for independent aging – all within 90 days. For another 82 consumers who required long-term support, **Case Managers** answered the call.

In addition to record high caseloads, the amount of time spent per consumer increased year-over-year for Options Counseling (42 percent) and Case Management (19 percent). This indicates not only more seniors in need of assistance, but that the average case is also getting more complex.



Case Manager Ann Neville shares a laugh with a consumer during a home visit.

PROGRAM HIGHLIGHTS

The **Elder Rights Program** works with many of the most serious cases at Heritage addressing abuse, neglect and self-neglect, the latter of which was most common for the year.

Reported cases are unfortunately on the rise: 228 consultations and 204 assessments/interventions are both new highs for the agency. No matter the severity or length of recovery, Heritage and its community partners are dedicated to helping these seniors stabilize and start a new, safe path forward.



(from left) Barbara Werning and Laura Kriegermeier of Heritage AAA, Iowa Governor Kim Reynolds and staff from another Area Agency on Aging pose for a photo after the Governor signed a new Elder Rights bill into law in June.

An estimated 330,000 lowans* – more than 10 percent of the state’s population – are caregivers for an older adult. These family, friends and neighbors are the unsung heroes of aging and deserve support in their journey.

The **Caregiver Support Program** aided 651 caregivers during the year. Like the seniors they care for, some just seek a quick referral and others need support year-round from a case manager. Heritage also launched Caregiver 101, a series of seminars to educate caregivers on a range of important topics.

Please pass on my gratitude. I end up spending roughly \$200 a month for food for him so these vouchers are able to reduce that number for me. He likes bananas so this will allow him to get them each month.

- letter from a Caregiver Support Program consumer

*AARP “Valuing the Invaluable” Report, 2023

Nutrition, Wellness and More

Heritage is proud to be a leader in the state and across the nation for senior nutrition services. From award-winning dining programs to serving on national advisory committees, fellow Area Agencies on Aging turn to Heritage for guidance and inspiration. Unlike grandma, Heritage is happy to share its secret recipes to help serve seniors nationwide.

I am new to this service, but I am impressed with it all! The food has been great and seems to have all categories covered... You can't feel alone at Encore Café.
 - diner feedback form

Delicious, fresh, dietician-approved meals on the plate turn a room into a dining site. Turning a dining site into a community that fosters fellowship while filling the stomach and soul alike takes so much more. Heritage is proud of its staff and subcontractors in the **Congregate Dining** program who built these communities and dished up 57,900 meals for nearly 1,700 consumers during the year.

While in-person dining is always encouraged, it's not always practical for older adults. More than 287,000 **Home-Delivered Meals** were cooked up by subcontractors, who also provide invaluable wellness checks at the point of delivery.

TAILS (To Aid In Lives of Seniors) provided 51 consumers' furry friends with 4,200 pounds of pet food. The grant-funded program also helped 14 pets receive veterinary care.



Heritage staff and local dignitaries cut the ribbon to open Encore Express in Washington. The site routinely serves 75+ diners per meal.

PROGRAM HIGHLIGHTS

Returning to in-person wellness classes was a welcome move for Heritage and participants alike. **Tai Chi for Older Adults** was the agency's most popular offering, drawing seniors no matter the time or place. Heritage leads evidence-based classes with proven positive outcomes like Tai Chi's strengthened core muscles and improved balance.



Heritage partnered with a coffee shop to teach Tai Chi for Older Adults at sunrise, making for a beautiful setting on their patio during cool autumn mornings.

The **Older Workers Employment Program (OWEP)** served 110 job candidates per month on their journey to enter or re-enter the workforce. Success stories are fascinating in their range from résumé writing that lands a part-time job to starting a new business like the freelance photographer whose passion became his profession.

As more doors reopened, getting out into the community to network, educate and build awareness was key to Heritage's growth. The agency racked up 178 **Outreach and Education** events, including nine media placements in local news.

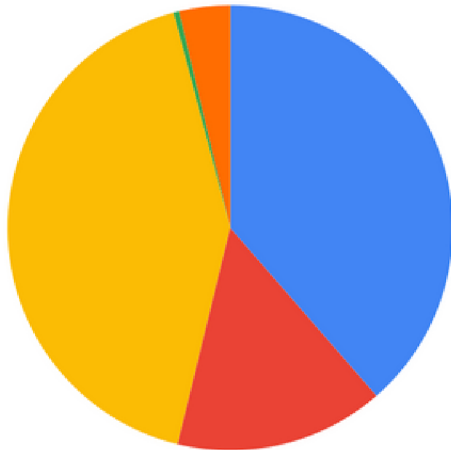


Heritage sets up shop at the Five Seasons Stand Down, an annual event in Cedar Rapids for veterans experiencing homelessness or near homelessness.

FISCAL OVERVIEW

A financial snapshot of Heritage Area Agency on Aging with percentages rounded to the nearest tenth. Please note that this report aligns with the calendar year and not Heritage AAA's Fiscal Year. For a complete picture of Heritage's finances by Fiscal Year, visit our website: heritageaaa.org/audit

Revenues: \$7.30 Million



- Federal: 38.6%
- State: 15.2%
- Match: 42.1%
- Program Contributions: 0.4%
- Grants: 3.7%

Investments and Endowments are not included in Revenues due to a loss in 2022. Heritage's Investments and Endowments outperformed the S&P 500 by 4.5 percent (-14.9% vs -19.4%).

Expenses: \$7.33 Million



- Staff: 24.6%
- Person-Centered Dollars: 3.8%
- Operating: 6.9%
- Other Match: 38.3%
- Subcontracted: 26.4%

Expenses by Program



- Nutrition: 54.9%
- Supportive Services: 17.0%
- Elderly Services General: 10.3%
- Caregiver Program: 7.8%
- Lifelong Links: 2.1%
- Other: 7.9%

MANAGEMENT

Barbara Werning, Executive Director

Kellie Elliott-Kapparos, Integrated Services Director

Jenn Knudtson, Fiscal Director

Jill Sindt, Community Advancement Director

BOARD OFFICERS

Sister Susan O'Connor, Chair
Vice President of Mission Integration, Mercy Medical Center

Pat Heiden, Vice-Chair
Johnson County Board of Supervisors

Scott Olson, Treasurer
Cedar Rapids City Council

Keith Stamp, Treasurer
Kirkwood Community College Board of Trustees

Management and Officers as of Jan. 1, 2022

CONTACT

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