



advocacy | action | answers on aging



**The Area Agency on Aging—NACOG
ANNUAL REPORT
FY2015**

INDEX

Mission Statement	3
Director’s Introduction	4
By The Numbers	6
Our Service Providers	8
Program Summaries	9
FY2015 Financial Statement	18
AAA-NACOG Staff	19

OUR MISSION

The Mission of Area Agency on Aging Region III-Northern Arizona Council of Governments (NACOG) is to provide the tools necessary to maximize independence and dignity and to implement a comprehensive coordinated system of services and resources. Area Agency on Aging-NACOG will holistically support adults, families, and caregivers through assessment, planning, advocacy, information, referral, counseling and community networking.

AREA AGENCY ON AGING-NACOG

43 S. SAN FRANCISCO ST.

FLAGSTAFF, AZ 86001

TOLL-FREE 1-877-521-3500

WWW.NACOG.ORG/AGING

Services are funded by the Older Americans Act, SSBG funds and the State of Arizona. Funding is allocated on a regional basis from the Arizona Department of Economic Security, Aging and Adult Administration to Area Agencies on Aging.



The Area Agency on Aging—NACOG started 40 years ago, funded by the Older Americans Act. We are the backbone of long-term services and support system for older Americans in Northern Arizona.

Mary Beals-Luedtka—Director

FOREWORD

In July 1965, President Lyndon B. Johnson signed three landmark pieces of legislation that together have shaped the lives of generations of American elders – Medicare, Medicaid, and the Older Americans Act. The overarching goal of the Older Americans Act, to promote the independence of older Americans age sixty and above, has remained largely unchanged since its enactment. Medicare and Medicaid extended health insurance coverage to millions of Americans.

As a result of the 1973 amendments to the federal Older Americans Act, states were required to divide their state into planning and service areas, and to designate Area Agencies on Aging to develop and implement programs and services for older persons at the local level. The Area Agencies on Aging in Arizona were established in 1975, and this year we ask you to join us in celebrating our 40th anniversary.

Highlights of FY2015

FY2015 was full of challenges, changes and new opportunities. We continue to analyze our programs for efficiencies and return on investment. I started and developed the Legal Advocacy for Seniors program in 1991. During our program analysis it was very apparent that this program had the highest unit rate cost of all the programs and we were not serving clients with legal issues that were more complex. The decision was made to discontinue Legal Advocacy as a direct Area Agency on Aging service and sub-contract with Legal Services. We now have three contracts for Legal with DNA Legal Services in Flagstaff; Southern Arizona Legal Services in the White Mountains and Community Legal Services in Prescott, Arizona.

We are also continuing to build our business acumen. We signed a contract to sell monitoring systems with Critical Signals Technologies (CST). This marks our first private pay contract. We chose CST due to a National contract with members of n4a – the National Association of Area Agencies on Aging.

“FY2015 was full of challenges, changes and new opportunities. We continue to analyze our programs for efficiencies and return on investment.”



The contract allows us to bring better value to those seeking a personal emergency response system with no long term contract for the client. The system furthers our mission to enable older adults to live in their homes and communities and remain independent as long as possible.

The State of Arizona launched a new computer system this year and this has proven to be quite a challenge for everyone involved. Staff continues to work diligently with a system that is not yet totally functional.

Looking ahead to FY2016

On July 13, 2015 Director Mary Beals Luedtka attended the White House Conference on Aging at the White House in Washington D.C. as the only invitee from the State of Arizona. The invitation from President Obama was received early in July. This historic event was telecast across the nation as the President and invited speakers addressed issues of aging in our country and in the world. The event was a culmination of Regional events and online input through the White House Conference on Aging web site.

In October of FY2016 the Area Agency on Aging will host the 24th annual Elder Issues Conference at the High Country Conference Center along with a special reception to celebrate the 40th Year of service from the Area Agency on Aging—NACOG.

Focuses for FY2016 include:

1. Hosting the first AZ4A (Arizona Association of Area Agencies on Aging) State Aging Summit on May 19th and 20th at the High Country Conference Center in Flagstaff, AZ
2. Policy reviews and updates
3. Publishing an RFQ (Request For Qualifications) for Home and Community Based services for the Region in the spring of 2016
4. Analysis of data collected, why we collect it, do we need it, what is missing?
5. Creating an outreach plan for the agency across all programs.

Mary Beals-Luedtka—Director

16,562 Individuals

Lives We've Touched in Northern Arizona

The Area Agency on Aging develops, coordinates and delivers aging services for Apache, Coconino, Navajo and Yavapai Counties in Northern Arizona, providing nutrition, supportive and caregiver services to older Americans.



1,866 People helped in Senior Services

5,653 Phone Calls Referred



57 People Received legal services



NUTRITION

173,372 Home Delivered Meals to **1,324** Hungry Seniors
77,140 Lunches to **3,316** Seniors



MEDICARE BENEFITS COUNSELLING

3,228 People Counselling for Benefits

TRANSPORTATION

14,007 Trips / 53,665 miles for **1,103** Passengers



Our Programs and the People We Served

Senior Services

1,866 People Helped

Nutrition

4,640 People Served

- Congregate Meals 77,140 Meals
- Home Delivered Meals 173,372 Meals

Adult Care

542 Clients Served

- Day Care 4,616 Hours
- Attendant Care 11,115 Hours
- Respite Care 1,923 Hours

Legal

91 Hours of Legal Advice

Benefits Counselling

3,228 People Counseled

Ombudsman

1,584 Individual Consults

Health and Wellness

264 Participants

Family Caregiver Support

1,132 People

- Caregiver Access Assistance 623 Caregivers
- Grandparents Caring for Grandchildren 230 Grandparents
- Training Counseling and Support 220 People
- Respite Services 59 People

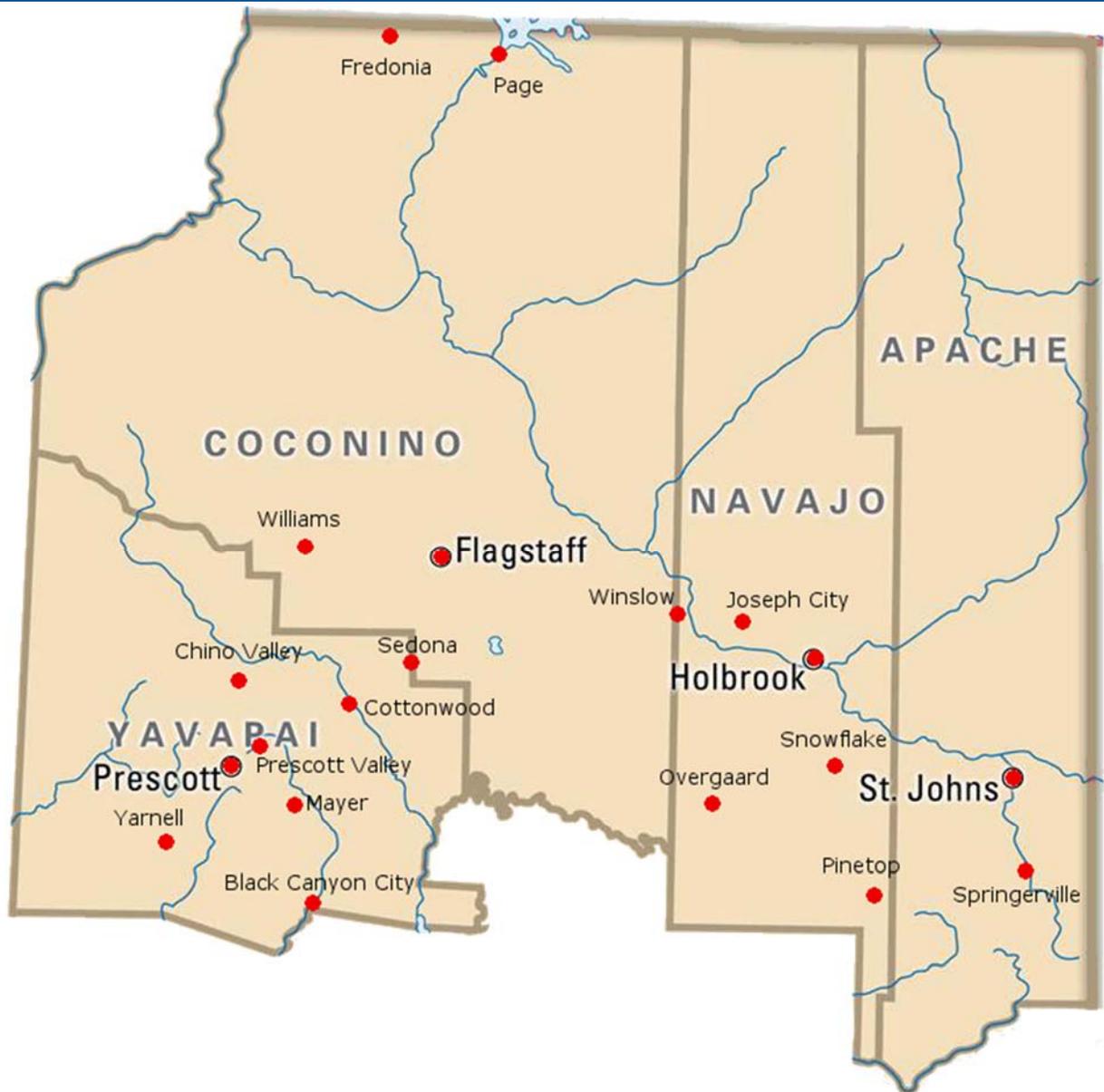
Intake and Referral

5,653 Referrals

Transportation

14,007 Trips for 1,103 People

Our Service Providers



Nutrition

Black Canyon City
 CASA Senior Center
 Chino Valley Senior Center
 Coconino County Comm. Services
 Fredonia Senior Center
 Holbrook Senior Center
 Mayer Area MOW
 MOM's Meals
 Page Senior Center
 Pinetop-Lakeside Senior Center
 Prescott MOW
 Rim Country Senior Center
 Sedona Adult Comm. Center

Silver Creek Senior Center
 Round Valley Senior Center
 St. Johns Senior Center
 Verde Valley Senior Center
 Winslow Council On Aging
 Yarnell Senior Center

Transportation

Coconino County Comm. Services
 Holbrook Senior Center
 Mayer Area MOW
 NAU Civic Service Inst.
 New Horizons Ind. Living Center
 Round Valley Senior Center

Verde Valley Caregivers Coalition
 Winslow Council On Aging

Home and Adult Care

Adult Care Services
 Lutheran Social Services
 MARC Community Resources
 ResCare Homecare

Legal Aid

Community Legal Services
 DNA Legal Services
 Southern Arizona Legal Aid

Senior Service Program

Under the “Older Americans Act” signed in 1965 by Lyndon Johnson. A support system was established to fund critical programs to help seniors stay healthy and independent in their homes.



Care Coordinators assess the individual for eligibility for the supportive services. Supportive services are: Home Delivered Meals, Attendant Care, Respite, and Adult Day Care for Socialization or Respite. Our Care Coordinators also use Community Resources to help clients with needs outside our scope of services.

Reports from some seniors that receive services are that they wait each day just to see the delivery person’s smile and hear their voice. Our clients are homebound, unable to get out of their homes. If we did not provide this service many would be in nursing homes where the cost would be much higher than the cost of helping them stay in their homes.

Our services help prevent Elder Abuse, Neglect and Exploitation. With caring providers reporting to the Care Coordinators when there are changes with the clients. We have helped clients get to the doctor by using community resources, and reporting exploitation of finances and neglect. The Senior Service Program gives our clients much needed support to stay independent in their homes.

In FY2015 we provided:

- **Adult Care** – 43 Clients received 4,616 hours of care
- **Attendant Care** – 396 Clients received 11,115 hours of in-home care
- **Respite Care** – 59 Families received 1,923 hours of relief
- **Spring House Cleaning**—44 Client homes



Nutrition

Home Delivered Meals

The Area Agency on Aging contracts with 18 home delivered meal sites that provide a hot, nutritious meal to participants 60 and over, who are unable to attend a congregate meal site because of a health condition or physical disability. In Arizona 295,686 seniors are isolated and living alone, while 182,300 are threatened by hunger. Some 396,304 have difficulty paying for basic living needs.

Adequate nutrition is critical to health, functioning, quality of life, and is therefore an important component of home and community-based services for older people. Home-delivered meals provide the support that keeps seniors in their homes, where they want to be.

Congregate Meals

Area Agency on Aging contracts with 18 congregate meals sites that provide a hot, nutritious meal to participants 60 and over. The meals are served on a regular schedule in a congregate setting while also promoting opportunities for participants to improve

their physical and mental health through a variety of health related services. The goals of the congregate meal sites are:

- To reduce hunger and food insecurity
- To promote socialization in older individuals
- To promote health and wellbeing of older individuals
- To provide nutrition education

Outcomes

3,316 participants received 77,140 nutritious meals through the congregate meal program. These participants were able to increase their nutrient intake in a safe social setting.

Seniors remaining at home, out of hospitals and nursing homes saves billions in Medicare and Medicaid costs. The 173,372 meals, friendly visits and safety checks that were received through the Home Delivered Meal program are often all it takes to enable our seniors to live independently in their own homes.



Legal Services for Seniors



The Legal Advocacy for Seniors Program is a mandated program in the Older American's Act. The program purpose is to assist adults 60 and over with administrative and civil law issues. The potential client should not have the ability to obtain legal counsel.

The program assists with Income only qualifying trusts, which assists clients with ALTCS eligibility when they would otherwise be excluded from the service. The impact is significant because the client does not have enough income for private pay of long term care, but has too much income to qualify without the trust. This ensures they receive the long term care that they need.

The program also assists with document preparation such as Living Wills and Health Care Powers of Attorney. This allows older adults who are no longer able to plan ahead to make choices for themselves before a medical crisis occurs.

This program also advocates for clients in landlord/tenant housing issues. Many clients do not realize what their rights are and could potentially be homeless without the assistance they receive in this area.

The program will assist with consumer issues. Informing the older adult what their rights are and advocating for them can be the difference between losing dollars they cannot afford to lose and resolving whatever the consumer issue might have been. This often comes to play in repair shops and mechanic issues.



Medicare and Benefits Counseling

The Medicare Benefits Counseling Program provides services to clients age 65 and older, and clients 65 and younger with a disability.

Medicare Benefits Counseling

Under this program, counselors must provide the following services through individual counseling, phone consultation, and presentations in Yavapai, Coconino, Navajo, and Apache Counties:

- Assist clients in navigating the Medicare system and understand benefits.
- Prescreen for eligibility for extra help through the Medicare Savings Program, and Low Income Subsidy for Prescription Drug Plans.
- Provide information/comparisons on Advantage plans, Drug plans, and Medigap plans.
- Provide information on how insurances work together to include Veterans Assistance, Tri-care, retirement insurance

- Provide information on Medicare Fraud and Abuse.

IMPACT

A large number of persons over 65 in our region are within 135% of the Federal Poverty Level. Many of these persons would not be able to afford medical and drug coverage without the use of the Federal Assistance programs that we screen for.

Summary of Services Provided in FY2015

1,558—Direct or Phone Counseling
93—Medicare Savings Program Applications
78—Low Income Subsidy Applications
1,477—Assistance with Medicare Issues
22—Medicare Presentations to 495 people



Ombudsman



work closely and under the direction of the State Ombudsman. We report issues and statistics directly to the State Ombudsman/DES-Division on Aging and Adult Services. We also work closely with Adult Protective Services, ALTCS, local social service agencies and law enforcement.

Numbers for FY2105

- 1,584 Individual Consults/Telephone Calls
- 265 Case Investigations Reported to the State
- 703 Visitations to Skilled Nursing and Assisted Living Facilities
- 217 Volunteer Hours

The Long Term Care Ombudsman program was established by Congress in 1965 and funded under the Older American's Act to have a program in place that seeks to resolve complaints on behalf of residents in LTC facilities, including assisted living and skilled nursing homes. Ombudsmen are given the authority to receive, investigate and assist in resolving complaints on behalf of residents through Federal and State laws. They are tasked with making routine visits to facilities to talk with residents and monitor the conditions of those State licensed facilities.

IMPACT

Our Regional Ombudsman Coordinator, Staff Ombudsman and Volunteer Ombudsman



Evidence Based Health and Wellness Programs

Evidence-based programs have been endorsed by the US HHS Administration on Aging and the Centers for Disease Control and Prevention Arthritis Program. When you adopt an evidence-based program, you get an intervention with defined goals and proven results for a specific target population. The evidence-based program package includes a researched rationale for the intervention, a well-defined program structure and timeframe, required staffing needs and skills, specific facility and equipment requirements, and program evaluation tools to measure program quality and health outcomes. Evidence-based programs will increase the likelihood of positive outcomes for participants and provide tools to measure those outcomes for the justification of funding and efficient use of resources.

Area Agency on Aging-NACOG offers the evidence-based health and wellness programs within our service area to address the impact that chronic disease has on the Medicare program. Medicare reports that more than two-thirds of beneficiaries have multiple chronic health conditions. Our goal is to have an ever increasing number of adults engaged in evidence-based programs that inform, activate and empower them to improve their health and maintain independence.

The evidence-based programs that we offer include *Chronic Disease Self-Management*; *Diabetes Self-Management*; *Chronic Pain Self-Management* and *A Matter of Balance*. Access to these evidence based health and wellness programs is critical in order to achieve reductions in health care utilization and more importantly higher quality of life for older adults with multiple chronic health conditions.



OUTCOMES

Fiscal year 2015 has been a busy time providing evidence-based trainings and workshops throughout the four counties we serve. We conducted 5 trainings that certified 28 people to deliver the programs and facilitated 18 workshops reaching 264 participants.

The Family Caregiver Support Program provides a range of services to support family caregivers.

Family Caregiver Support Under this program, States shall provide five types of services: Information to caregivers about available services; Assistance to caregivers in gaining access to these services; Organization of support groups, individual counselling and caregiver training; and Supplemental services on a limited basis. These services work in conjunction with other State and Community-Based services to provide a coordinated set of supports.

IMPACT

Studies have shown that these services can reduce caregiver depression, anxiety and stress. This enables the caregivers to provide care longer, thereby avoiding or delaying the need for costly institutional care.

Summary of Services Provided:

- 623—Caregiver Access Assistance
- 220—Training, counseling & support services
- 230— Grandparents 55+ Caring for grandchildren
- 59—Respite Services



Intake and Referral

1-877-521-3500

Central Intake serves as a one stop, single point of entry for long-term supports and services for seniors, family caregivers, persons of disability, service providers and consumers.

Our toll-free number, email, website, walk-in and fax are all points of entry. The toll free number is available 24 hours a day.

AIRS Certified Information and Referral Specialist handle incoming calls and requests. AIRS is a national professional organization that sets the standards for Information and Referral.

I & R staff assess a client's needs in a non-judgmental and confidential manner, answer questions on long term care supports, AAA programs, state, federal and local programs to give appropriate resource referrals. A pre-screening intake is conducted for case management and other services.

Legal assistance is provided through sub-contracted service from three Legal services offices. Our staff screens calls prior to sending a referral to a legal provider. If a legal referral to the provider is not appropriate, other referrals are provided.

Central Intake staff also manage the Resource House, a list of for-profit and non-profit agencies that support our target population. This list is used by AAA staff for referrals and to find resources in their area. This list is also sent to the State for inclusion into the AZLINKS website, the Arizona's Aging and Disability Resource Center.

Contact Central Intake staff directly if you have a referral for someone who needs services or to find resources.



Transportation



The Area Agency on Aging NACOG provides Transportation services to all four counties in our service area via subcontracting with local and regional agencies. Our territory covers Coconino, Yavapai, Apache and Navajo counties. Transportation services assist individuals with maintaining their independence and allowing them to have better mobility and accessibility to services within their communities. The Transportation program is funded by the Older Americans Act, by Social Services Block Grant and State funding.

Transportation services can be accessed by phoning into our toll free number and speaking with our Central Intake Department. Eligibility criteria for Transportations services is 60+, providers may provide services of up to 5% to people who are under 60 and disabled as the Social Service Block Grant allows.

Subcontractors and various partner agencies provide services to different rider types and vehicles to accommodate the needs of each

rider depending upon the region and services available.

[Transportation Providers for FY2015](#)

- Coconino County Community Services
- Holbrook Senior Center
- Mayer Area Meals on Wheels
- NAU Civic Services Institute
- New Horizons Independent Living Center
- Springerville / Round Valley Senior Center
- Verde Valley Caregivers Coalition
- Winslow Council on Aging



Statement of Financial Activities

For FY2015 - July 1, 2014 through June 30, 2015

REVENUE

Older Americans Act	\$ 2,625,145
Social Services Block Grant	\$ 698,673
State Funding	\$ 632,594
Other Federal Funding/Discretionary Dollars	\$ 315,747
TOTAL REVENUE	\$ 4,272,159

EXPENSES

Direct Services	\$ 2,028,072
Sub-Contracted Services	\$ 1,474,672
Administration	\$ 333,830
Other	\$ 17,411
TOTAL EXPENSES	\$ 3,853,985

DIRECT SERVICES

Case Management	\$ 869,992
SCSEP	\$ 374,792
Program Development	\$ 176,744
Long Term Care	\$ 139,086
Health & Wellness	\$ 101,888
Community Education	\$ 101,490
Medicare & Benefits	\$ 96,880
Information & Referral	\$ 78,648
Caregiver	\$ 54,364
Reassurance	\$ 34,188
Other	\$ 17,411

TOTAL \$ 2,045,483

SUB-CONTRACTED SERVICES

Meals	\$ 1,077,583
Home & Adult Care	\$ 316,041
Transportation	\$ 70,954
Legal Aid	\$ 10,094

TOTAL \$ 1,474,672

AAA-NACOG Staff

[Executive Office](#)

Mary Beals-Luedtka

Director

Nicole Kiddoo

Assistant Director

[Program Managers](#)

Brandon Baxter

Family Supports

Judy Puckett

Senior Services

[Contracts & Administration](#)

Leticia Cancino

Contracts Specialist

Michael Burrington

Quality Assurance Manager

Bob Simmons

Data Administration Specialist

Kurtis Kegley

Administrative Assistant

[Health & Wellness](#)

Susan Hunter

*Health and Nutrition Site
Coordinator*

Beth Brehio

*Health and Wellness Program
Assistant*

[Intake and Referral](#)

Margaret Czachowski

Central Intake Coordinator

Dion Connelley

*Certified Information & Referral
Specialist*

Josena Burke

Resource Information Specialist

Aurelia Martinez

Information & Referral Specialist

[Ombudsman](#)

PJ Janik

*Regional Ombudsman
Coordinator*

Bruce Reed

Ombudsman

Susan Reily

Ombudsman

Shana Smith

Ombudsman

[Family Caregivers Support](#)

Lita Nelson

Family Caregiver Specialist

[SCSEP](#)

Paula Buchanan

SCSEP Coordinator

[Medicare and Benefits](#)

Jana Bays

Medicare/Benefits Coordinator

Melba Whitmore

Medicare/Benefits Counselor

Susan Hawley

Medicare/Benefits Counselor

[Care Coordinators](#)

Racelle Carlson

Kolene Catanzariti

Nancy Coman

Stacy Conley

Jacob Johnson

Kathy Kent

Celia LaFave

Colleen McBride

Roxann Menzies

Thomas Nelson

Laura Reed

Jessica Reissner

[Reassurance Specialists](#)

Betty Mahler

Lori Winfield