



Answers



You



Can



Trust

2018  
Annual Report



## MISSION

Innovative Options  
+ Sustainable Services  
= Empowered Lives

## VISION

Independence and well being  
for those we serve.

## VALUES

**Teamwork:** We engage all of our stakeholders in an environment that promotes teamwork, partnership, and collaboration.

**Integrity:** We are committed to the highest levels of integrity, financial responsibility, ethical and honest behavior, and transparency.

**Quality:** We strive for excellence in the performance of our duties and provision of services that are timely, affordable, accessible, reliable, and promote personal choice.

**Innovation:** We are a leader in seeking innovative, visionary, and proactive solutions and approaches in the delivery of services.

**Respect:** We foster an atmosphere that values the contributions of all employees, volunteers, and community partners. We assist those we serve with the greatest level of respect and compassion and with a high regard for cultural diversity and personal choice.

## 2018 Board of Directors

Karen Wintringham, Chair  
Andrew Hetzel, 1st Vice Chair  
Ronald Borngesser  
Jeff Chang  
Howard Collens  
Commissioner Andrey Duzyj  
Walter Ernst  
Dr. Monika Grewal  
Sandra Hann  
Commissioner Ruth Ann Jamnick  
Commissioner Kate Lawrence  
Madelyn McCarthy  
Tom Miree  
Sue-Anne Sweeney  
Mark Rotterdam  
Commissioner Conan Smith  
Commissioner Karl Tomion  
Barbara Turner  
Commissioner Jason Turner  
Commissioner Helaine Zack

## 2018 Advisory Council

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Theresa Monsour, 1st Vice Chair  
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Steve Faine  
Jim Forrer  
Dennis K. Griffin  
Jyme Hager  
Kristie King  
Catherine Martin  
Vanessa Metti  
Floreine Mentel  
Christina Murray  
Darin Smith  
Dr. Joseph Sucher  
Mark Swanson  
Scott Turske  
SaraMarie Watson  
Tom Zaremba

## Michigan Senior Advocates Council Representatives

Floreine Mentel  
Dr. Joseph Sucher  
Mark Swanson  
Tom Zaremba

## Consumer Advisory Team

Bonnie Clayborn  
Katherine (Katy) Kay  
Ann Pappas  
Michael Zerkich



# Dear Friends



*Karen Wintringham*  
Chair, Board of Directors

2018 encompasses a year of achievements, a year of new directions and a year of financial strength that will build a strong foundation for the future of our mission. We have asked more of our staff and of our partners, but the result is undeniable. Together we have improved the lives of so many, and moving forward, our vision is to strengthen and grow that positive impact.

A significant focus in 2018 was the strengthening of our fiscal performance in an era of increased need, increased regulation and increased competition. To respond to those pressures, we reduced the financial stresses of three major programs, SameAddress, MI Health Link and MI Choice:

- SameAddress is an innovative program to provide needed services to clients who could afford to pay out-of-pocket for the services. In turn, the revenues from the program would be used to support more clients who could not afford them. This past year, we partnered with a local organization to manage SameAddress. This new partnership eliminated all financial liability for the Agency while providing the opportunity for shared earnings in the future.
- MI Health Link, the health care option for dual eligible launched in the state in 2015, required changes to reduce some of the losses we experienced. We implemented billing process changes for our MI Health Link contracts, improving our receivables and making the program more financially viable for our Agency.
- MI Choice is the largest revenue source for our Agency. In 2018 we successfully recruited additional talented and experienced leadership. With hard work by everyone both within the department and across the Agency, we achieved operational efficiencies to strengthen the financial position of the program while continuing to deliver essential services to our participants.



*Michael Karson*  
President & CEO

We enhanced our health and wellness programs, delivering valuable free workshops focused on fall prevention, diabetes management and chronic pain management to older adults in partnership with many community focal points. We also successfully implemented Medical Nutrition Therapy

(MNT), a Medicare covered, evidence-based medical approach to treating certain chronic conditions through the use of an individually-tailored nutrition plan. MNT provides a new revenue stream for the Agency while improving the health of older adults and adults with disabilities.

Reaching family members who are caring for an older or disabled loved one is an important objective for our Agency. In 2018 we strategically changed direction, shifting from more traditional marketing tactics to growing our digital marketing. An increased digital presence will connect our Agency to family caregivers at their time of need; and increase our overall reach to this target population. To support our digital expansion, we made the difficult decision to end our long-standing Solutions for Family Caregiver Expo and stopped publication of our ACCESS newsletter. However, we will be launching a new resource guide in 2019 and increasing the number of community and workplace presentations as two additional tools to reach both family members and older adults with information about our programs and services.

We made the investment to expand our philanthropic side of the organization. We created and filled a Director of Philanthropy position to focus on increasing both unrestricted and restricted donations to the Agency. We are excited about the new opportunities this will create to strengthen our mission and positively improve the lives we touch.

Finally, our greatest asset as an organization is our staff. We have launched a major focus on evaluating and enhancing the tools and approaches for our relationships throughout our team. We are involving all staff in designing changes to increase their vital engagement in the Agency. We strongly believe that supporting those who support our consumers is the best way to enhance our services and improve the quality of life of those we serve.

We are honored to share our 2018 Annual Report. Thank you for your support and dedication to improving the lives of older adults, persons with disabilities and family caregivers.

Sincerely,

Karen Wintringham  
Chair, Board of Directors

Michael Karson  
President & CEO



# 2018 Impact

**37,812 callers were helped** with understanding and accessing local programs and services to support older adults and adults with a disability through our AIRS accredited Resource Center.

**19,721 Medicare beneficiaries received guidance** on their Medicare options through one-on-one counseling with a Medicare Medicaid Assistance Program (MMAP) counselor.



## **\$2.6 million – money saved by Medicare beneficiaries**

who were counseled through MMAP and made changes to their current Medicare coverage or received assistance with applying for the Extra Help Subsidy, Medigap Subsidy or Medicare Savings Program.

**51,754 individuals visited our website** to learn more about our programs and services. 83% of those individuals were new visitors to our site.



**3,177 older adults and adults with disabilities** received assistance with finding affordable, appropriate transportation through the Myride2 program.

**133 older adults participated in travel training classes** offered by Myride2 to learn how to access and use public transportation including SMART and DDOT through a grant from the Regional Transit Authority of Southeast Michigan.

## **1,494 older adults participated in health and wellness classes**

including A Matter of Balance, Diabetes PATH, and classes focused on managing chronic illness and chronic pain.

**126 family members** caring for an older loved one attended a Powerful Tools for Caregivers, Best Friends, Dementia Live or REST workshop to improve their caregiving experience.

**180 seniors** from Livingston, Macomb, Monroe, Oakland, St. Clair and Washtenaw counties gathered on the Capital Lawn with over 1,100 seniors from across the state to celebrate the 11th annual Older Michiganians Day and advocate their legislators on key issues facing older adults.

## **\$250,000 was awarded to AAA 1-B's Reimagine Caregiving**

– 12 Innovations for Washtenaw Family Caregivers project through the Vital Seniors: A Community Innovation Competition, sponsored by the Glacier Hills Legacy Fund at the Ann Arbor Area Community Foundation.

**VITAL SENIORS:**  
A Community Innovation Competition



**\$2.5 million in additional state funding** was secured by the Silver Key Coalition, chaired by the AAA 1-B advocacy staff, to support in-home services for older adults in Michigan.



**Achieved SAGECares Bronze accreditation and the AAA 1-B** is now on the SAGE national referral list as a LGBT friendly organization.

## Community Partners

- Alzheimer's Association – Greater Michigan Chapter
- Catholic Charities of Southeast Michigan
- Catholic Social Services of Washtenaw
- City of Farmington Hills
- Deaf & Hearing Impaired Services
- Disability Network Oakland & Macomb
- Frenchtown Senior Citizens, Inc.
- Interfaith Volunteer Caregivers
- Jewish Family Services of Washtenaw
- JVS Human Services
- Lakeshore Legal Aid
- Livingston County Catholic Charities
- Livingston County Senior Nutrition Program
- Living Independence for Everyone
- Macomb Community Action
- Michigan Advocacy Program
- Monroe County Opportunity Program
- Monroe County Senior Legal Services
- National Council of Jewish Women
- National Kidney Foundation of Michigan
- Neighborhood Legal Services
- Oakland Livingston Human Services Association
- Oakland Meals on Wheels
- Older Persons' Commission
- Pontiac Meals on Wheels
- The Council on Aging, Inc., serving St. Clair County
- Washtenaw County Office of Community and Economic Development
- Waterford Senior Center
- Western Oakland Meals on Wheels

# Service Reports

## Contracted

### 58,868 Older Adults Served Through Community Partnerships

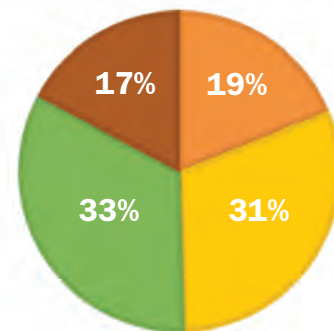
The Area Agency on Aging 1-B receives designated federal funding through the Older Americans Act, state funding through the Michigan Aging and Adults Services Agency, and local county contributions to support key services for adults, 60 years of age and older in our region. The AAA 1-B then contracts with local organizations, our community partners, to directly provide these services within each county.

### Contracted Services: Units Provided and Older Adults Served in 2018

SERVICE	UNITS	OLDER ADULTS
Adult Day Care	90,733	269
Chore	48,482	2,767
Congregate Meals	315,442	12,171
Elder Abuse Prevention	2,453	4,747
Evidence Based Health Programs	6,203	1,019
Grandparents Raising Grandchildren	1,158	142
Hearing Assistance Services	3,200	1,595
Home Injury Control	2,991	977
Home Delivered Meals	1,932,619	10,966
Legal Services	20,820	4,047
Long Term Care Ombudsman	5,666	9,387
Resource Advocacy	22,4054	10,283
Volunteer Caregivers	16,011	498

### Percentage of Older Adults Served by Age Group

60-69 years 70-79 years 80-89 years 90+ years



## Clinical Services Report

### 3,038 Older Adults and Adults with Disabilities Received In-Home Services

The AAA 1-B receives funding from the Michigan Department of Health and Human Services to provide in-home services through the MI Choice Medicaid Waiver program and Community Transition Service; funding from the Aging and Adult Services Agency to provide in-home services through the Community Care Management and Community Living Program; and the agency has a partnership with Veterans Administration to provide in-home services to qualified veterans.

### Individuals Served through Community Support Services Programs

County	Community Care Management (CCM) (includes Rapid Response Respite)	Community Living Program (CLP)	MI Choice Medicaid Waiver Program	Community Transition Service (CTS)	Veterans Administration HCBS
Livingston	4	99	57	3	1
Macomb	34	392	246	5	18
Monroe	19	379	48	5	0
Oakland	65	608	575	20	31
St. Clair	5	43	35	1	4
Washtenaw	15	208	103	5	2
<b>Total Served</b>	<b>142</b>	<b>1,737</b>	<b>1,064</b>	<b>39</b>	<b>56</b>

Units of service provided:		Funds expended (unaudited):	
CLP	845,886	CLP	\$3,565,421
CCM	26,644	CCM	\$122,861
MI Choice & CTS	3,977,237	MI Choice & CTS	\$25,375,999
VA-HCBS	230,636	VA-HCBS	\$1,178,160
<b>Total units of service</b>	<b>5,080,403</b>	<b>Total funds expended</b>	<b>\$30,242,440</b>

# Awards & Recognition

## Corporate Service Leadership Award

### DTE Foundation

In recognition of DTE Foundation's outstanding commitment to helping improve the quality of life of thousands of homebound older adults in Michigan through both funding and staff volunteer support of the Holiday Meals on Wheels program.



## Service Provider Leadership Award

### Excellacare

In recognition for consistently delivering high quality in-home services to older adults and adults with disabilities; and for supporting the agency's mission through contributions to fundraising efforts, advisory council activities and strategic planning.



## Area Agency on Aging 1-B Extra Degree Employee Award

In recognition of performance excellence:



**Melissa Timm**  
MI Choice Quality  
and Training Manager



**Nicole Justice**  
Community Health  
Worker

## Sandra K. Reminga Lifetime Achievement Award

### Mark T. Robinson

Executive Director  
Livingston County Catholic Charities

In honor of Mark's passion and dedication to enhancing the lives of older adults and family caregivers through his outstanding leadership at Livingston County Catholic Charities and collaborative partnerships in Livingston County; for excellence in administering programs for older adults; thoughtful advocacy on aging issues and for his contributions as a past member of the AAA 1-B Advisory Council.

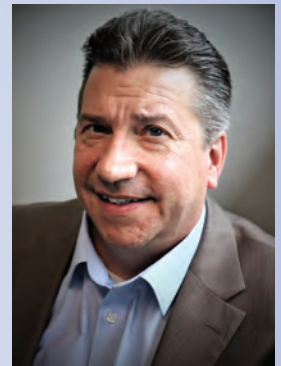


## Public Service Leadership Award

### Richard Kline

President and CEO of Senior Services Southwest Michigan, Former Senior Deputy Director of the Michigan Aging and Adult Services Agency

In appreciation of Richard's commitment to serving Older Michigianians through key state leadership positions; and for providing excellent guidance and support during the AAA 1-B's leadership transitions.



## Volunteer Service Leadership Award

### Commissioner Helaine Zack, Oakland County

Former Member, AAA 1-B Board of Directors

In recognition of Helaine's exemplary service provided to the agency as a valuable member of the Board of Directors and Governance Committee; and for dedication to improving the lives of older adults in Oakland County through advocacy efforts to increase funding to support seniors at risk of losing their independence.



# Financial Statement

## Area Agency on Aging 1-B Statement of Revenue, Expenses and Changes in Unrestricted Net Assets

	Years Ended September 30, 2018 and 2017	
	2018	2017
Changes in unrestricted net assets		
Revenue and support:		
Federal grants	\$ 11,601,611	\$ 10,368,511
State grants	33,713,453	32,467,871
Integrated care program	6,136,050	3,816,582
Local support	1,740,534	2,330,624
Local - county contributions	657,564	569,664
Program income	756,708	2,620,887
SameAddress program	509,655	843,764
Other income	1,820,922	2,230,807
Interest income	98,321	83,992
<b>Total revenue and support</b>	<b>57,034,818</b>	<b>55,332,702</b>
Program services:		
HCBS Medicaid Waiver	25,217,688	23,745,634
Aging and Adult Services	21,257,460	23,846,727
MI Health Link	6,389,760	5,007,948
SameAddress program	1,020,586	1,575,460
MMAP programs	596,956	298,402
Other programs	1,246,029	1,149,481
Total program services	55,728,459	55,623,652
Supporting services:		
Management and general	3,520,688	3,353,263
Administration expense allocation	(2,464,308)	(3,349,179)
Total supporting services	1,056,380	4,084
Total expenses	56,784,839	55,627,736
Increase (decrease) in unrestricted net assets before effect of pension liability adjustment	\$ 249,979	\$ (295,034)
<b>Effect of pension liability adjustment</b>	<b>\$ 519,906</b>	<b>\$ 412,998</b>
<b>Increase in unrestricted net assets</b>	<b>\$ 769,885</b>	<b>\$ 117,964</b>
<b>Unrestricted net assets - beginning</b>	<b>5,473,016</b>	<b>5,355,052</b>
<b>Unrestricted net assets - ending</b>	<b>\$ 6,242,901</b>	<b>\$ 5,473,016</b>

The above information represents one of the agency's basic financial statements. To obtain further information regarding the agency's financial performance, interested parties should examine a complete set of the audited annual financial statements.



**Area  
Agency on  
Aging 1-B**

*Answers you can trust*



**myride2**

Connecting Seniors &  
Adults with Disabilities to Rides



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Southfield, MI 48034

**Call 800-852-7795  
or visit our website  
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