

1971



50 YEARS

serving the community



2021
IMPACT
REPORT

Many things can change over the course of 50 years. The technology we use; the clothes we wear; the cars we drive; our goals and ambitions; our needs as individuals, families and communities. Even how and where we age has changed. We're working longer, living longer, and we want to be independent for as long as possible.

Since 1971, Council on Aging (COA) has been committed to helping older adults and people with disabilities live with independence and dignity. With each year of service, we've grown and adapted to the changing needs of our community. To celebrate our 50th anniversary, we've compiled histories of our programs and services to share with you in this, our 2021 Impact Report. Through these histories you'll see just how much things have changed – for COA and those we serve.

For example, half a century ago, older adults who needed help to live independently had few options: they could seek help from a family member or move to a nursing facility.

Today, family members still play a critical role in helping their loved ones maintain their independence, but they have local resources they can access to help carry this important responsibility.

COA has been a leading advocate for older adults and their families, ensuring they have a voice and a choice when it comes to where and how they receive care. As a result, people in southwestern Ohio have a full range of care options to meet their needs and help them live life on their own terms, regardless of age, income or ability. These options do not exist in other parts of the country – or even other parts of Ohio.



Suzanne Burke
President & CEO

While each decade of service has come with its own challenges, the last several years have been particularly difficult. In a few years, one in five Americans will be retirement age; seven in 10 will need some form of long-term care. At the same time, a nationwide shortage of home care workers has made it difficult to meet the demand for care, leaving family caregivers to provide increasingly complex care while also trying to raise families and manage careers.

And then there is the pandemic.

Perhaps more than any other time in COA's history, the community turned to us for guidance on how to support our vulnerable family members, friends and neighbors.

In marshalling assistance from other organizations and businesses in our community, and with support from foundations, partners and other donors, COA was able to step in and fill critical gaps that appeared during the pandemic. Meals, personal care supplies, masks and other protective equipment made their way to our neighbors in need. This report highlights some of our response to the pandemic, including important, pioneering work to help vaccinate older adults in our region.

In fact, the pandemic changed how we provide care – for the better and for the future. In a space where technology is often seen as a barrier to care, we're developing

programs that will help us meet the challenges of tomorrow by improving service delivery, expanding care options and connecting virtually to our clients and caregivers.

No one knows what the next 50 years will bring. But one thing is certain: aging affects all of us, at every level of society. And, most of us are driven by the desire for independence. We are fortunate to have a wide range of programs and services to offer older adults in our community, but there will always be challenges. With the community's support, COA will continue to find innovative, cost-effective and compassionate ways to meet these challenges head on and improve the quality of life for those we serve.



*Scan the code to watch our
50th Anniversary Video!*

COA administers publicly-funded programs and services for older adults, people with disabilities and their caregivers.

Our programs and services impact people of all ages and the effects are felt throughout our community. We help people stay in their homes and communities, complete smooth transitions from one care setting to another, and connect to unbiased information, advice and community resources.

Through contracts with service providers, senior centers and other community organizations, COA administers federal, state and local funding to provide supportive, in-home and community-based services to individuals and caregivers.

Programs and services administered by COA can prevent or delay nursing home care. This is important because people want to remain in their homes as long as possible and our programs and services cost taxpayers a fraction of the cost of nursing home care.



IT IS OUR MISSION TO...

Enhance lives by assisting people to remain independent through a range of quality services.



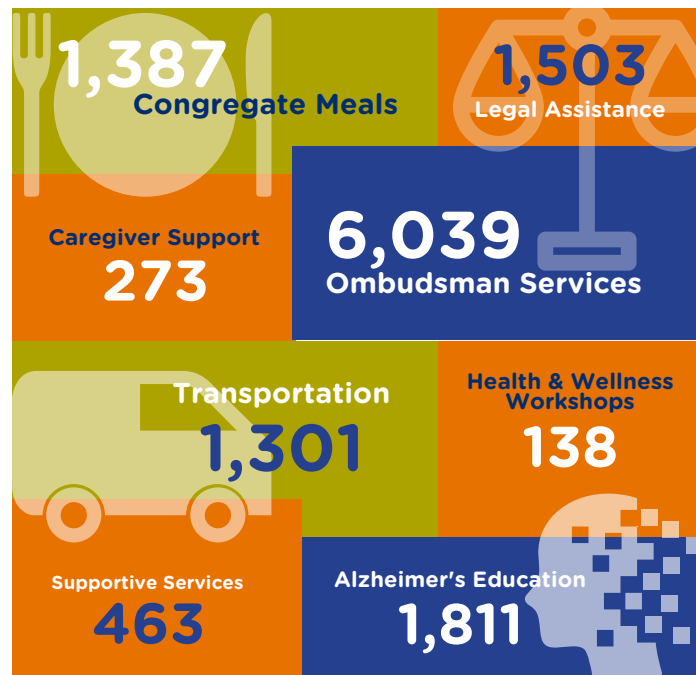
In-Home Care Services:

Individuals enrolled in fiscal year 2021. Individuals may be counted in more than one service category or program in the course of a year.

| Traditional Medicaid Waiver Programs | Enrolled |
|---|----------|
| PASSPORT | 1,609 |
| Assisted Living Waiver | 530 |
| Specialized Recovery Services Program | 1,006 |
| | |
| Other Programs | Enrolled |
| Elderly Services Programs (Senior Levies) | 15,076 |
| MyCare Ohio (Medicaid/Medicare) | 5,252 |
| Other Case Management Services | 2,814 |
| | |
| Total in-home care clients: 26,287 | |

Community-Based Support:

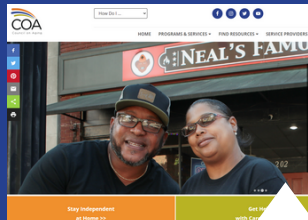
Individuals served in fiscal year 2021. Services funded by federal Title III of the Older Americans Act and state Alzheimer and Senior Community Service funds.



Impact Highlights



26,287
individuals remained independent in their homes with our help



298 contracted organizations provided nearly
1.4 million hours of in-home care

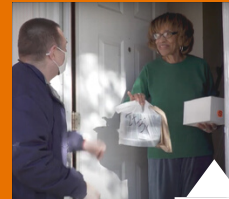
55,966 requests for information and referral fulfilled and **165,708** users of COA's website



128,141 trips for medical and senior center activities



Engaged nearly **5,000** community members through presentations and other events



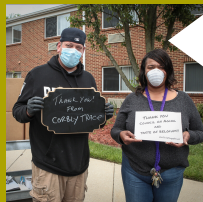
1.9 million meals served through home-delivered and congregate meal programs



2,007 clients transitioned from hospital or nursing facility to home via transitional programs such as FastTrack Home



COVID-19 Highlights



62,908
restaurant meals
delivered to residents
of low-income senior
apartment buildings

3,013
older adults
vaccinated against
COVID-19 at area
clinics and in their
homes with
support from COA



7,879
boxes of personal care
items assembled and
shipped to clients

Caregiver Support Program now offers overnight respite

Council on Aging's free Caregiver Support Program offers one-on-one support, advice and resources to family and other informal caregivers to help them manage their caregiving responsibilities. And now, the program is also able to offer overnight respite care so caregivers can take a much-needed break.

If appropriate, this service will provide up to seven days (overnight) of care in an area care facility. All of the care recipient's needs will be met while at the care facility. Caregivers are then free to use this time for respite – rest, catch up on housework or paperwork, visit out-of-town friends/family, take a vacation, etc.

"Caregivers give so much of themselves and often neglect their own needs when caring for a loved-one," said Anna Goubeaux, RN, COA's caregiver support nurse. "Caregiver burnout is one of the top reasons older adults and people with disabilities end up in nursing homes. Supporting caregivers and giving them much-needed time off benefits everyone."



*"Council on
Aging was a
breath of fresh
air when I didn't
realize I was
suffocating."*

– Aimee, caregiver

50 years: A look back

Council on Aging's roots date to 1965 when Congress passed the Older Americans Act (OAA) in response to concern about a lack of social services for older adults. Today the OAA authorizes a wide array of service programs through a national network, including more than 600 Area Agencies on Aging (AAAs).



Follow the timeline for highlights from our 50 years of service and scan the code to read the full histories of COA's programs.

1970



COA began operating in 1970 as a Community Chest project with three staff members and a budget of \$40,000. Boone, Campbell and Kenton counties in Kentucky and Clermont and Hamilton counties in Ohio were the first areas served by COA.

1974

COA is designated by the state of Ohio as an Area Agency on Aging serving Butler, Clermont, Clinton, Hamilton and Warren counties in Ohio. COA no longer serves northern Kentucky.

1971

In 1971, older adults living in the City of Cincinnati became a major focus of COA, and on Dec. 27, 1971, Council on Aging of the Cincinnati Area incorporated as a tax-exempt nonprofit organization.

1973

The Older Americans Act formally established Area Agencies on Aging as "on the ground" organizations charged with helping vulnerable older adults live with independence and dignity in their communities.



AGING & DISABILITY RESOURCE CENTER

Information and referral (I/R) is a keystone service for COA in 1974. Each county in our service area had a dedicated office and phone line for people seeking I/R about programs, services and resources for older adults.

NOW: COA is a federally designated Aging and Disability Resource Network, making it easy for individuals to access the breadth of services available in our community through one access point. ADRC staff field nearly 56,000 requests annually, via our call center, website and social media outlets. The story on page 18 illustrates the meaningful impact ADRC staff have on the lives of older adults in COA's region.



COA holds first Senior Expo, a tradition that continued for 33 years.

1977

Lois Brown Dale petitions Ohio Governor Rhodes to change state law to allow for levies dedicated to senior services.

1979



Clermont County passes the first county-wide levy in the state dedicated solely to senior services.

1982



COA presents its first Forum on Aging, a conference for professionals in the field of aging.

1987

1981/1984

PASSPORT

To combat a perceived “institutional bias” in the Medicaid system, in 1981 the federal government began allowing states to use Medicaid funds to provide non-medical services to allow individuals to remain in home and community settings vs. institutional placement. In 1984, Ohio launched PASSPORT, giving low-income older adults an alternative to Medicaid nursing-home care. Ohio’s Area Agencies on Aging played a critical role in the program’s roll out. PASSPORT became popular as the preference for in-home care grew.

NOW: COA and other advocates have fought to keep PASSPORT open. Budget cuts and a nursing home lobby limited its growth for years. Ohio’s Area Agencies on Aging launched a successful advocacy campaign to carve out a bigger chunk of Ohio’s Medicaid long-term care budget in favor of in-home care. Because of other state-funded care options, PASSPORT is a much smaller program today than it was just a decade ago. But it remains an important safety net for low-income adults who need help to remain independent in their homes.



50 years: A look back

ASSESSMENT

COA began completing in-home assessments in 1987 as PASSPORT, Ohio's Medicaid in-home care program, expanded across the state.

NOW: COA is widely recognized for its expertise in understanding and addressing the unique care needs of older adults, partly because of our history of meeting individuals where they are – at home. COA's assessment team evaluates individuals for seven programs and also conducts long-term care assessments to help families understand their options for care.



1987

PRE-ADMISSION REVIEW

Ohio begins contracting with Area Agencies on Aging to conduct reviews of everyone seeking admittance to a Medicaid-certified nursing facility. At the time, the back log of cases was so great, staff took work home on evenings and weekends. The process was slow and laborious, with staff having to go to the library to print copies of Ohio Administrative Code.

NOW: Snail mail and trips to the library have been replaced by email communication and sophisticated statewide computer systems. COA's "Pre-Ad" team prides itself on timeliness and customer service and has become a trusted resource for hospital and nursing facility staff who are trying to navigate a complicated system. The team completed more than 18,000 reviews in 2021.

1993

1992

ELDERLY SERVICES PROGRAM

In the early 1990s, state and federal funding did little to meet the needs of a growing older adult population. Financial eligibility requirements for Medicaid excluded many older adults who needed care but could not afford private care. Those caught in the middle often ended up in nursing homes, where they spent down hard-earned savings and eventually ended up on Medicaid anyway.

NOW: Through the work of local advocates, each county in COA's service area has a dedicated senior services tax levy. The levies paved the way for the Elderly Services Program (ESP), beginning with Hamilton County's program in 1992. Administered by Council on Aging, ESP makes it possible for older adults of modest means to remain independent in their homes and communities. The programs also provide relief for family caregivers juggling the responsibilities of work, raising a family and elder caregiving. ESP helps make our region a great place to live – for people of all ages and abilities.



TRANSITIONAL CARE (Care Transitions, FastTrack Home & Medical Mutual)

Until 2010, most programs administered by Council on Aging required an in-home assessment in order to determine eligibility for services. The requirement to be “at home” for an assessment created barriers to care for older adults who were being discharged from hospitals and skilled nursing facilities, many of whom needed specialized care and support in place right away in order to ensure a successful recovery and to avoid costly – and common – hospital readmissions.

NOW: A journey that began in 2010 as a small pilot project aimed at reducing hospital readmissions among older adults at the University of Cincinnati Medical Center, led to a multimillion dollar Medicare contract and the development of a program that has expanded to serve three counties and save countless lives and resources during the pandemic. Today, through a number of programs and contracts, COA is widely seen as an expert in helping older adults successfully navigate complicated transitions of care.

2010



COA wins
Better Business
Bureau's Torch
Award for
ethical
business
practices.

1996

The first
Elderly
Services
Program levy
passes in
Butler County.

1998

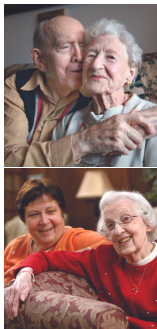
First Elderly
Services
Program levy
passes in
Clinton County.

Name change
to Council on
Aging of
Southwestern
Ohio.

2002

First Elderly
Services
Program
levy passes
in Warren
County.

2006



ASSISTED LIVING WAIVER

Until 2006, low-income older adults and people with disabilities in Ohio had just two options for long-term care: in-home care via PASSPORT, or nursing home care. But many older adults and younger people with disabilities who wanted to live independently needed care somewhere in between.

NOW: Thanks to advocacy, Assisted Living was added to the menu of options available through Ohio's Medicaid waiver programs. Assisted Living provides more support than is available through PASSPORT, while offering privacy and independence in a supportive, community setting. COA played a key role in launching the program, including developing policies and procedures related to the program and provider management. With program eligibility beginning at age 21, it also marked the first time COA served people under age 60.

50 years: A look back

Care Transitions Program was named runner-up for a Women Excel Award for Best New Product of the Year from Cincinnati USA Regional Chamber of Commerce.



2013



COA and the Elderly Services Program are featured in the PBS documentary, "Caring for Mom and Dad."

2014

SPECIALIZED RECOVERY SERVICES PROGRAM

In 2016, vulnerable Ohioans were left without health coverage after changes were made to Medicaid eligibility requirements. The Ohio Department of Medicaid created the Specialized Recovery Services Program (SRSP) to fill gaps in care for impacted individuals age 21 and older with severe and persistent mental illness. This was COA's first experience with this population. To support the program, COA recruited and hired staff with backgrounds in mental health services.

NOW: One year after it was created, SRSP expanded to include adults with certain diagnosed chronic health conditions and those who were active on transplant waiting lists. As a result, COA's client roster for SRSP grew 4,000 percent in one year. Today, COA provides recovery management, individual placement and support, and peer support services to 1,006 SRSP clients enrolled in the program via Aetna Better Health of Ohio.

2016

MYCARE OHIO

At age 65, many older adults who've been receiving in-home care services via Medicaid also become eligible for Medicare. Because these "dual eligibles" typically require more care than other Medicaid beneficiaries, and at a higher cost, Ohio's Office of Health Transformation and the Ohio Department of Medicaid sought a way to streamline this care with the goal of improving outcomes while reducing costs.

NOW: When it launched in 2014, MyCare Ohio brought big changes to Ohio's long-term care system. Following the launch, Area Agencies on Aging advocated for clients and providers who experienced lengthy service and business disruptions. Since then, Ohio's Area Agencies on Aging have fought to be recognized for their expertise in serving vulnerable, older Ohioans. Despite these challenges, MyCare Ohio provided COA the opportunity to demonstrate value and to form important partnerships with managed care companies.



2017

FastTrack Home wins the Health Collaborative's Inspire I Healthcare Quality Improvement Award



HOME52

In 2017, COA launched home52, a wholly-owned non-profit subsidiary, after federal funding for COA's Care Transitions program ended. Traditional funding sources have been a barrier to COA in developing innovative programs to serve more older adults and other populations in our region. home52 allows COA to market our community intervention and care management expertise, as well as other new service lines, to a variety of prospective partners, including hospitals, managed care organizations, primary care providers, behavioral health organizations, municipalities and others.



home52 gives COA the flexibility to seek out alternative funding sources and to develop and test innovative solutions that could positively impact service delivery and quality of life for older adults and other populations. In most cases, products and services launched under home52 are still COA products, delivered and managed by COA staff. Learn more at home52.org.

HOME52's Positive Choices

Recognizing COA's success with reducing hospital readmissions among high-use populations, in 2017 Humana tapped Council on Aging to help reduce hospital readmissions and high-cost emergency department use among its members with substance use disorders. Positive Choices was the first program launched via COA's subsidiary and innovation hub, home52. It was also the first managed care contract secured by COA outside of Ohio's Medicaid managed care system.

NOW: Armed with solid performance numbers and compelling client success stories, the Positive Choices team convinced Humana that Positive Choices could have a positive impact on other groups within the health plan's member base. Today, the program serves Humana members in southwestern Ohio, Columbus and Northern Kentucky.



COA purchases and moves into new headquarters building.

2021

December 27, 2021
HAPPY ANNIVERSARY,
COA!



2020



COA launches USDA
Senior Farmers'
Market Program in
its region.

2021 Highlights

COA moves headquarters in 2021

For the first time in the organization's 50-year history, COA became a homeowner. In August 2021, COA moved its headquarters from Springdale to Blue Ash, in Hamilton County. COA's phone numbers did not change, and we continue to operate an office in Wilmington (Clinton County). "Our building will allow us to host events, organize drives on-site, and other activities that we realized were critical to meet the needs of seniors during the pandemic," CEO Suzanne Burke told the Cincinnati Business Courier in an interview about the move.



Scan the code for full highlights stories from pages 14-18.



Local and national awards recognize COA's response to COVID-19 pandemic

Council on Aging programs and staff were recognized by a number of organizations in 2021 for our response to the COVID-19 pandemic. CEO Suzanne Burke received a C-Suite Award from the Cincinnati Business Courier in the CEO, Large Non-Profit category. Burke was nominated by COA staff for her leadership, both during the pandemic and over the course of her tenure at COA where she has fostered a values-based culture focused on growth through innovation.

COA's Burke recognized as top CEO in the region



COA's COVID-19 response, particularly programs aimed at providing comfort and meals and protecting the health and safety of older adults, received several awards, including a national emergency preparedness award from the Alliance of Information and Referral Systems (AIRS) and a Clinton County Community Champion (C4) Award.

Comfort Meal program grows, wins award during year two of pandemic

COA's Comfort Meal program, which launched at the start of the pandemic to provide food and comfort to isolated low-income older adults in area senior apartment buildings, expanded during 2021, thanks in part to a \$25,000 donation from Humana's Bold Goal initiative, and the addition of new restaurant partners.



Forum on Aging returns in 2021, virtual style!

After the coronavirus forced COA to cancel the 2020 Forum on Aging the evening before the event was scheduled to start, Forum on Aging returned in 2021 in a virtual format. Nearly 250 people attended the conference, which occurred over two half days in April. Attendees enjoyed presentations from eight professionals on topics related to aging.



COA and home52 launch on-demand transportation service

home52 Transportation is a centralized and coordinated system developed to meet the unique needs of riders who require specialized transportation services. home52 Transportation provides the right type of vehicle, at the right time, with the right support to meet an individual's needs. The service launched in 2021, providing more than 8,600 trips, including over 700 trips to COVID-19 vaccination appointments. Learn more at home52.org.

2021 Highlights

COA honors area home health aides as 2021 heroes

Home health aides provide critical and often life-saving care for older adults who want to remain in their homes as they age. In addition to providing personal care and assistance with everyday tasks, home health aides get to know their care recipients intimately and can be the first to notice critical changes in physical and behavioral health.

In 2021, COA was pleased to recognize three local individuals as 2021 Home Health Aide Heroes: Deborah Grant (Clinton County Community Action Agency), Gwen Squire (A Miracle Home Care) and James Roe (Hillebrand Home Health).



Home health aides recognized through Service Excellence Award program



As part of our efforts to bring greater attention to the critical care provided by home health aides, COA also revamped its Service Excellence Awards program in 2021. Launched in 2019, the recognition program calls attention to the important role this workforce plays in helping COA fulfill its mission. More than 170 area home health aides have been recognized through this program since 2019.

COA and volunteers prepare 7,600 personal care supply boxes for area older adults

During the pandemic, many COA clients have been stuck at home, afraid to venture out to shop for food and other necessities. And at times, many items like toilet paper and cleaning products have been hard to come by. From October 2020 through January 2021, more than 120 COA staff, service providers and volunteers worked together (often in difficult weather conditions) to assemble 7,600 personal care supply boxes in a barn at the Butler County fairgrounds.

“It’s just good to know that somebody’s got your back, and it gives you hope, and it lifts your spirit,” said a COA client who received one of the boxes.



COA helps older adults get COVID-19 vaccinations



COA played a key role in helping area older adults get vaccinated against COVID-19. At the start of Ohio’s vaccination process, COA helped older adults navigate complicated online registration systems, tracked local vaccine availability, helped schedule appointments, and partnered with local vaccine providers and the Ohio National Guard to offer vaccination clinics for older adults. COA also provided free transportation to vaccination appointments and developed an award-winning process for vaccinating homebound individuals. In all, COA helped more than 3,000 area older adults get vaccinated.

2021 Highlights

Senior farmers' market program nearly doubles participants in 2021

In its second year operating in southwestern Ohio, the United States Department of Agriculture Senior Farmers' Market Nutrition Program (SFMNP) nearly doubled in size, providing 2,213 low-income area older adults with fresh, local produce for no out-of-pocket cost.

Working with community members and the Ohio Department of Aging, Council on Aging (COA) brought the program to its service area for the first time in 2020. Despite the challenges and uncertainty posed by the early months of the COVID pandemic, more than 1,100 people joined the program in its first year.



Caregiver note illustrates the importance of COA's "front door"

COA's Aging & Disability Resource Center (ADRC) is considered its "front door," most often the public's first point of contact with the agency. The staff in ADRC respond to more than 55,000 requests for information and referral each year, often from older adults and caregivers who are dealing with stressful, life-changing situations and aren't sure where to turn for help.

"I was extremely impressed with my recent conversation with Ms. Jennifer Limle! As background, I am desperately trying to get help for my dear Mother, Mary Francis, who is very ill and needs various resources/assistance/guidance. I called COA and spoke with Jennifer, and from the very moment she answered the phone, she was very compassionate, professional, caring, knowledgeable, and provided very helpful information for next steps to seek approval for PASSPORT and other services/ programs handled by COA. This is a very stressful time and every bit of kindness makes a big difference in this world! Please give my family's heartfelt thanks and gratitude to Ms. Jennifer and your COA family. Jennifer is amazing and I hope you can appropriately recognize that she goes above and beyond the call of duty to serve!"



Caregiver Evelyn Smith (r), and her mother Mary Francis

Statement of Financial Activities | Year Ending September 30, 2021

Despite the complexity of our financial activity – with local, state and federal funding requirements – COA has an unbroken record of clean annual audits that goes back more than 20 years.

| Support and Revenue | | |
|--|--|--------------|
| Local Government | Elderly Services Program | \$37,616,337 |
| Medicaid Waiver | PASSPORT, Assisted Living | \$24,962,326 |
| Other Programs & Program Income | Client contributions; MyCare Ohio, Specialized Recovery Services | \$15,246,664 |
| Federal Government | Titles III, VII, XX; HEAP; Nutrition Services Incentive Program; Paycheck Protection Program; CARES Act* | \$15,774,642 |
| State Government | Senior Community Service, Alzheimer's, Senior Volunteer | \$1,038,785 |
| Other Support & Revenue | Donations, Interest | \$178,822 |
| Total Support and Revenue | | \$94,817,576 |
| Expenses | | |
| Community-based In-home Services | | \$55,428,163 |
| Care Management | | \$20,540,994 |
| General Administration | | \$9,021,102 |
| Community-based Senior Center Services | | \$2,609,649 |
| Information, Referral and Assessment | | \$2,804,376 |
| Total Expenses | | \$90,404,284 |

*CARES Act: Coronavirus Aid, Response, and Economic Security Act
Financial statement does not include subsidiaries wholly owned by Council on Aging.



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