

Start with us. Grow with us. Age with us.

annual report

2022



**Ohio District 5
Area Agency on Aging, Inc.**



about us

The Ohio District 5 Area Agency on Aging, Inc. (AAA) is a nonprofit agency that serves Ashland, Crawford, Huron, Knox, Marion, Morrow, Richland, Seneca, and Wyandot Counties. We have programs for all ages and income levels; however, we specialize in services and programs for older adults and anyone with disabilities.

For nearly 46 years, AAA has served North Central Ohio with the same goal in mind: to help older adults and individuals with disabilities live safely and independently in their homes for as long as possible. We manage programs that provide in-home help and can connect you and your loved ones to various community-based services, including transportation, nutrition programs, and safety monitoring. We also offer free workshops to those with diabetes and other chronic conditions and educational resources, respite, trainings, and support for caregivers and grandparents raising grandchildren.

Additionally, AAA funds and develops programs for the people we serve, and we advocate for older adults at the local, state, and national levels. We also partner with organizations and agencies in our service area to provide options and answers to those who seek them.



mission

The Ohio District 5 Area Agency on Aging, Inc. provides leadership, collaboration, coordination, and services to older adults, people with disabilities, their caregivers, and resource networks that support individual choice, independence, and dignity.

vision

The Ohio District 5 Area Agency on Aging, Inc. will be a leader in long-term care systems and the preferred organization in providing advice and services that enhance the independence, dignity, and quality of life of older adults, individuals with disabilities, and their caregivers.

COMMENTS BY THE CEO

I am pleased to present the 2022 annual report for the Ohio District 5 Area Agency on Aging, Inc., highlighting our achievements, successes, and journey. Our mission and vision continue to serve as the framework for our focus. Our priority is to connect individuals with resources, services, and programs to support independence and dignity. We focused on listening to our aging network, the people we serve, our providers, and our caregivers.

Understanding the evolving needs of our consumers, the growth of programs was at the forefront of our objectives. We can keep older adults healthy, independent, and socially connected by expanding programs such as congregate meals, wellness classes, and several other effective programs and services.

One of our key accomplishments this year has been the successful launch of the Community Care Program. This program has not only addressed the personal care workforce shortage, but it has also deployed quick and effective care to vulnerable individuals while serving as a career development path for STNAs.

Additionally, we have continued to invest in our employees' development, fostering a culture of excellence and innovation. By attracting top talent and providing them with opportunities to grow, we have built a strong and resilient workforce that forms the foundation of helping the individuals we serve.

Looking ahead, we remain focused on seizing new growth opportunities and enhancing our customer service. We will continue to foster strategic partnerships and explore potential housing developments that address the shortage of affordable housing for older adults. We will strive to make a positive impact on the aging network and community as a whole.

On behalf of the entire leadership team, I extend my gratitude to our board members, consumers, employees, providers, and partners for their collaboration and support. Together, we have achieved remarkable milestones and look forward to an exciting future. We are excited about the opportunities that lie ahead and remain dedicated to delivering long-term value. Again, Thank you for your trust and confidence in the Area Agency on Aging.

“

AS AN ORGANIZATION, WE HAVE ALIGNED OUR WORK TO REMOVE BARRIERS AND PROVIDE CLARITY ON CHALLENGES THAT NOT ONLY AFFECT THE AGING NETWORK AND POPULATION BUT HAVE ALSO MADE IMPACTS AT A LOCAL, STATE, AND NATIONAL LEVEL.”



Sincerely,

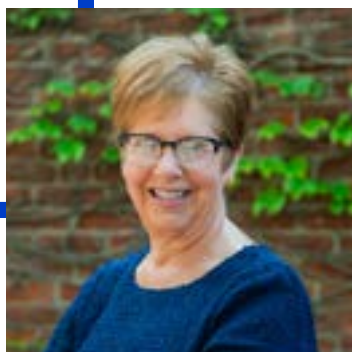
Duana Patton

Duana Patton, MBA
Chief Executive Officer

Executive Leadership Team



Duana Patton
Chief Executive Officer



Diane Ramey
Chief Clinical Officer
Trae Turner
Chief of Community Living
Nicole Williams
Chief Operating Officer



Lori Rowland
Chief Financial Officer
Michelle Deskins
Chief of Staff
Teresa Clayton
VP of Administrative Services



Susie Danuloff
VP of Governance and Marketing
Beth Fryman
VP of Medicaid Services
Alicia Blackledge
VP of Medicaid Services

Corporate Board

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Crawford Representative

Kellie Hartsel

Immediate Past President

Jana Mulherin

Vice President
Richland Representative

Cody Albert

Vice President
At-Large Representative

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Marion Representative

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Jerod Them

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Margie Tasseff

At-Large Representative

Brigitte Coles

At-Large Representative

Amanda Paez

Huron Representative

Leanne Smith

Seneca Representative

Dr. Rebecca Strickland

At-Large Representative

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Glen Cole

Diane Winger
Billie Brandon
Dorothy Stitzlein

Doug McLarnan
Carol Michaels
Mary Lou Wertman

2022

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Chair
Wyandot

Duana Patton

CEO/President

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Vice Chair
Richland

John Kastelic

Treasurer
Richland

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Knox

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Lloyd Dent
Heidi Sazdanoff
Becky Yannitell
Heather Kraft
Tom Joseph

Marcia Rice, Chair
John Stofira, Vice Chair

OUR IMPACT

1,534

PASSPORT
CONSUMERS

1,192

CASE MANAGED CARE
COORDINATION CONSUMERS

316

ASSISTED LIVING
CONSUMERS

1,558

CONGREGATE MEAL
PARTICIPANTS

257

OMBUDSMAN CASES

456

OMBUDSMAN ADVOCACY VISITS TO
LONG-TERM CARE FACILITIES

599

OMBUDSMAN ADVOCACY &
INFORMATION &
ASSISTANCE CALLS

630

ADULT PROTECTIVE SERVICES
INVESTIGATIONS IN CRAWFORD,
KNOX, MARION, AND WYANDOT
COUNTIES.

53,082

NUMBER OF INCOMING
PHONE CALLS

730

HOME MODIFICATION JOBS

730

ASSESSMENTS



The Area Agency on Aging aims to continue to progress into next year to enhance and meet the aging network needs.

The Area Agency on Aging will continue focusing on building a greater presence in its nine-county service area. It will recognize the challenges and unmet needs of those they serve and find effective ways to address them.



EXPANDING OUR HELP AND SERVICES

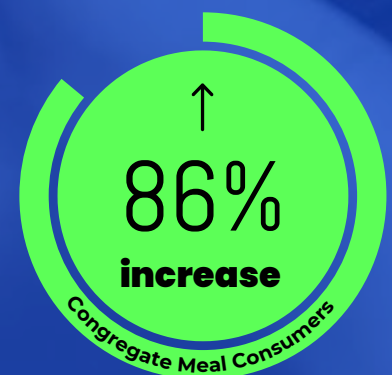
EXPANDING OUR SERVICES

As part of the Agency's dedication to ensuring individuals with disabilities can access long-term care services and support, we successfully broadened our impact by extending our coverage under the Ohio Home Care Waiver (OHCW) to include Union, Licking, and Delaware counties. OHCW is a valuable program that provides essential benefits and services for eligible individuals, typically seniors and people with disabilities, who prefer to receive care and support in the comfort of their own homes rather than in institutional settings like nursing homes.



ENHANCING CONGREGATE MEALS

The Hawkins Corner congregate meal site returned in early 2022. Participants gather to enjoy a nutritious communal meal in the company of friends and community members, with the added benefit of taking home two frozen meals for later. These gatherings also feature special programming, covering diverse topics such as health and wellness, entertainment, technology, estate planning, and engaging in creative crafting activities.



HONORS & RECOGNITION

In 2022, the Agency was recognized for achievements. Celebrating these accomplishments continue to inspire our team for growth and innovation.

- The Ashland Chamber of Commerce honored the Agency with the **2022 Spirit Award** for its unwavering dedication and commitment to combatting the enduring challenges posed by the Coronavirus Pandemic.
- Volunteers in the Long-Term Ombudsman Program passionately advocate for individuals receiving in-home care, assisted living, and nursing home settings. Their dedication and commitment earned them the title of **Advocate of the Year** recipients at the Area Agency on Aging Annual Meeting.
- The Agency garnered recognition at the **o4a Five Star Innovation and Education Summit**, where it was honored with the 2022 Medical Mutual Aging and Disability Innovation Award in the Workforce category for its outstanding Community Care Services Program. This innovative program addresses the shortage in the personal care workforce by enhancing the clinical, office, and leadership skills of STNAs. Through this program, the Agency has been consistently delivering crucial in-home care to individuals who were previously underserved due to workforce shortages.



Trae Turner, Chief of Community Living, was recognized as the **AAA Staff Member of the Year** for his outstanding service to the Ohio Aging network through his work on the Caregiver Task Force.

SHARING KNOWLEDGE

Presenting at national and state conferences holds significant weight as we can expand upon the collective knowledge in the aging network. It provides a platform to share the Agency's expertise and innovative ideas. It serves as a vehicle for advocacy, stimulates new ideas, and promotes collaboration and partnership.

- Richard Meeker, MSW, LISW-S, Community Living Manager, presented at the **2022 National Adult Protective Services Association Conference** in Grand Rapids, Michigan. He shared his knowledge on "The Continuing Impact of the COVID Pandemic on Mental Health and the Aging."
- Presenting at the **12th Annual Community Development Summit**, Duana Patton, CEO, shared her expertise during the session "Creative Collaborations for Affordable Housing."
- Duana Patton and Joe Recchie of Praxis Partners presented on the topic of "How Community-Based Organizations Can Support Housing as a Vital Social Determinant of Health" at the **American Society on Aging Conference**.
- Expanding education on the value of Community Health Workers, Duana Patton, CEO, spoke at the **USAging Region V Meeting**.

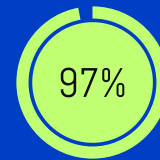


Fostering employee engagement is essential, and we focus on the key aspects and strategies to cultivate a culture of appreciation, productivity, leadership, mentorship, efficiency, and teamwork. With a 97% employee satisfaction rate, we implement programs that enhance work/life balance, wellness, professional development, and continuous improvement. When we work hard for our team, our team will work hard for the individuals we serve. We will continue to grow our team and help them become more involved, informed, and knowledgeable.

INVESTING IN OUR PEOPLE

93

Hours of CEUs
completed by the
leadership team.



Employee Satisfaction



GIVING BACK TO THE COMMUNITY



The Agency is also dedicated to making a positive impact on our communities. A significant aspect of engaging our employees is giving back to our communities. We do this by supporting local businesses, stewardship, and encouraging community cohesion. We understand that giving back is a collective effort; the smallest acts can make a significant difference. By finding ways that resonate with our values and mission, we can contribute to building more robust, more compassionate communities.

\$3,750

**donated by
our employees**

Donations went to Richland County food banks, Knox County New Directions, Richland County Domestic Violence Shelter, United Way of Richland County, Stronger by Choice, and Sponsor-A-Family in Crawford and Richland County.

UNDERSTANDING THE ROLE OF CAREGIVERS

MAKING A DIFFERENCE FOR CAREGIVERS

In 2021, the Agency participated in a state-wide caregiver task force comprising representatives from the twelve area agencies in Ohio. The objective was to inventory caregiver services and supports offered across the state and to identify potential service gaps.

After assessing state-wide caregiving efforts, the Agency found an opportunity to enhance how it was helping caregivers within its nine-county service area (Ashland, Crawford, Huron, Knox, Marion, Morrow, Richland, Seneca, and Wyandot counties).

The in-home **Companion Care** program was designed to provide hands-on care. It gives the caregiver some time for their own socialization and personal care or tasks.

By partnering with skilled nursing facilities, the **In-Patient Caregiver Respite** services will relieve caregivers by allowing their loved ones to stay for an approved number of days in a nursing facility. The intent of this service is to provide short-term, around-the-clock care to relieve those caregivers who may need to step away from their complex caregiving role for an extended amount of time.

CELEBRATING CAREGIVERS

In observance of National Caregiver Month, the Agency organized its Annual Caregiver Conference in November, dedicated to celebrating the invaluable contributions of family and kinship caregivers. In collaboration with the Richland Academy of Arts, caregivers enjoyed a day filled with entertainment, art and music classes, a delicious lunch, and enlightening presentations.



LISTENING TO GRANDPARENTS

In partnership with Marion Job and Family Services, Community Counseling and Wellness Center in Marion, Project Noel, and Family Life Counseling in Richland County, the Agency organized a *Grandparents Raising Grandchildren* roundtable in Marion. The purpose was to engage with caregivers, particularly grandparents, to understand the challenges, barriers, and issues they face while raising their grandchildren. The insights gathered from this discussion served as a valuable foundation for developing initiatives, programs, and events aimed at making a positive impact on grandparents in the community.

CATALYST OF GIVING

The Area Agency on Aging Endowment



In 1948, John and Winnie Mulherin, Pat Mulherin's grandparents, established the Dairy Queen stores in Mansfield. Reflecting on their enduring commitment, Pat Mulherin is committed to the benevolence of the community. "The community welcomed the Mulherin Family back then, and our family still wholeheartedly supports the community through nonprofit engagement. We believe in our responsibility to give back."

"Our philanthropic philosophy is simple; it is about giving back. The endowment fund will be a way for people to donate to the Area Agency on Aging and make a difference in our community."

-Jana Mulherin

In 2022, Jana Mulherin, a member of the Corporate Board, and her husband, Pat Mulherin, paved the way for individuals to contribute to the Area Agency on Aging. They achieved this by granting funds from their Richland County Foundation donor-advised fund to create an endowed fund for the Agency. Their vision for the Area Agency on Aging Endowment Fund is to inspire and catalyze future donations from generous donors.



Spherion's (Ontario, OH) donation to the "Walt and Ann Bishop Fund" of the Area Agency on Aging will provide essential support to caregivers of individuals with Dementia and Alzheimer's.



Commander William Myers of the VGW Post 9943 presented a \$5,000 donation to the Area Agency on Aging, earmarked for the assistance of local Veterans, as well as the widows and orphans of Veterans.

We extend our sincerest gratitude to our incredible community of donors. Your unwavering support has empowered our organization to make a positive difference and create a lasting impact. Together, we are building a stronger and brighter future for all.

COMMITMENT TO PEOPLE

EFFICIENCY

Continuous Improvement

Kaizen events hold significant importance for the Agency as they promote a culture of continuous improvement and innovation. Enhancing efficiency, they focus on identifying and eliminating process inefficiencies, leading to improved productivity and resource optimization. By continuously evaluating and refining our service delivery processes, we can enhance the quality of assistance and support we provide to the individuals we serve. These events empower staff by fostering a sense of ownership and empowerment through engagement and job satisfaction.

Embracing continuous improvement fosters a culture of innovation, adaptability, and collaboration.



INNOVATION & IMPACT

Extending Care



The Agency requested a waiver to offer direct in-home personal care and homemaker services utilizing state and federal funding, and the request was granted. This approval enables the Agency to broaden its services beyond the scope of the Richland County Senior Services Levy funds, thereby extending care to areas beyond Richland County. This expansion allows the Agency to meet extended care needs effectively.

QUALITY

Measuring Outcomes

Agency team members are committed to providing positive outcomes that improve individuals' sense of well-being by showing compassion, courtesy, and respect. The clinical team consistently meets any outcome measures at a 90% or higher score in all actions, demonstrating commitment and dedication to serving older adults and individuals with disabilities.



IMPROVING INDEPENDENCE AT HOME

Home Modification Program



The Area Agency on Aging Home Modification program has been in place for 26 years and currently serves 49 counties in Ohio. This program retrofits or adjusts existing homes to improve physical accessibility for individuals with disabilities or individuals who desire to age in place.

“The most important thing to me is my independence, and I have that now because the Agency widened my doorways for my wheelchair.”

- Client



The certified team strives to improve the lives of individuals by enhancing independent living through home modification.

The robust Home Modification program, funded through various partnerships with community partners, is important because it preserves independence, maintains community connections, addresses the lack of alternative housing, minimizes social isolation, and promotes civic engagement.

In addition to service coordination and other programs, Home Modification is another layer of support to help keep individuals independent and safe in their homes and communities.



Scan the QR code to watch the Home Modification Mission Moment

Completed
730

**HOME MODIFICATION
JOBS**

LISTENING TO NEEDS



RESPONSIVE AND EFFECTIVE

In recognition of our success, CareSource acknowledged our team for their role in assisting an individual with mobility challenges and medical disabilities. With the collaborative efforts of Agency team members, this individual was provided with a speech-assistive device, granting them the ability to engage in their healthcare actively.

CULTIVATING SOCIALIZATION

With the support of funding from the Richland County Senior Services Levy, the Agency successfully provided social isolation grants designed to benefit seniors. These grants were distributed to six organizations, receiving amounts ranging from \$2,000 to \$10,000. The funded projects and activities encompassed a wide range, including cooking workshops, crafting sessions, bingo games, and organized senior trips.

"These projects will provide socialization and promotes relationships that will have a lasting impact."

-Trae Turner, Chief of Community Living

ENCOURAGING SAFETY IN THE HOME

The Agency hosted a safety event in recognition of Fire Prevention month and to encourage older adults to proactively assess their fire and carbon monoxide safety measures. Made possible through the Richland County Senior Services Levy, the Agency provided over 600 smoke and carbon monoxide detectors to more than 300 Richland County older adults. Local community fire departments and the Red Cross were also on site to provide additional education in fire safety.



LISTENING TO PROVIDERS' CHALLENGES

The Agency organized a Provider Round Table, where caregivers, service providers, case managers, and consumers shared their stories. These firsthand perspectives shed light on the significant impact of the direct care workforce shortage and its implications for the increasing older adult population.

EFFECTIVE USE OF FUNDING

FUNDING TO SUPPORT THOSE IN NEED

CareSource, a notable nonprofit health plan, has generously donated \$1,000,000 to the Agency to support a wide range of programs benefiting vulnerable individuals across Ashland, Crawford, Huron, Knox, Marion, Morrow, Richland, Seneca, and Wyandot Counties. The donation will notably expand the current program that focuses on providing one-time essential items that enable individuals to maintain safety and independence in their homes, items often not covered by other sources of funding.

Furthermore, the Agency recognizes the need for Community Health Workers (CHWs) in the counties they serve as they play a pivotal role in improving health and social equity by addressing individually modifiable risk factors, spanning medical, social, and behavioral health needs. Their strong, trusting relationships with clients enable them to support coordination of care, coach individuals in acquiring new skills, access needed services, and make vital behavioral changes to enhance health and social outcomes. The funding from CareSource facilitated the expansion of the CHW program to serve vulnerable individuals of all ages and backgrounds within their nine-county region.

This generous contribution reflects CareSource's commitment to making a positive impact on the communities it serves and aligns with Agency's mission to provide essential services to those who wish to remain safe and independent in their homes.

"We are grateful for the invaluable partnership with CareSource and the support they have provided to those in need."

- Duana Patton, CEO

SAVING THE DREAM



The Area Agency on Aging accepted funding through the *Utility Assistance Plus (UAP) program* for Knox and Ashland Counties. As part of the *Save the Dream Ohio Program*, administered by the Ohio Housing Finance Authority (OHFA) and funded by the U.S. Department of Treasury's Homeowner Assistance Fund, it was designed to prevent homeowners who may have experienced financial hardship due to the COVID-19 pandemic and risked losing utilities, home energy services, or default risk, foreclosure, or displacement. The Agency could expand services.



Read a few success stories of the UAP

2022

STATEMENT OF ACTIVITIES

REVENUE

AUDITED 2022

Federal*	\$	29,569,445
State	\$	2,543,362
Local	\$	4,846,771
Other	\$	775,842
TOTAL REVENUE	\$	37,735,420



EXPENSES

AUDITED 2022

PASSPORT Services	\$	24,156,395
Senior Nutrition	\$	2,855,814
Community Services	\$	7,173,777
Caregiver Services	\$	488,407
Agency Support	\$	410,852
Corporate Activities	\$	1,923,319
Management and General	\$	907,296
TOTAL PROGRAM EXPENSES	\$	37,915,860

NON-OPERATING REVENUES AND EXPENSES

AUDITED 2022

Interest Income	\$	4,292
Change in Net Assets	\$	(176,148)
Net Assets - Beginning of YR	\$	11,086,396
NET ASSETS - End of YR	\$	10,910,248

Start with us.

Grow with us.

Age with us.



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