



2023  
Annual Report

*Advocating for the*  
**NEEDS OF  
OLDER ADULTS**  
*& individuals with disabilities*

# REPORT CONTENTS

## 4 AAA9 2023 Events

Events and initiatives at  
AAA9 throughout 2023

## 6 AAA9 By the Numbers

A snapshot of the impact  
of AAA9 in 2023

## 7 Division Highlights

Division accomplishments  
and community impact

## 19 Financial Report

Income and expenses  
for fiscal year 2023



A MESSAGE  
FROM THE CEO



JIM ENDLY  
*Chief Executive Officer  
Area Agency on Aging Region 9*

The year 2023 was a time of remarkable growth and service for the Area Agency on Aging Region 9, Inc. Through the dedication of our staff and the support of our community, we continued to expand programs, strengthen partnerships, and advocate for the needs of older adults and individuals with disabilities across our nine-county region.

This year, we celebrated impactful events, including the Older Adult Extravaganza, which brought together over 600 attendees to support the AAA9 Foundation. Our participation in key initiatives, such as the O4A Advocacy Conference and the USAging Annual Conference, allowed us to amplify the voices of those we serve while gaining valuable insights to enhance our services.

Our team worked tirelessly to address critical needs, from advocating for higher wages for direct care workers to combat workforce shortages to expanding programs like PASSPORT and Assisted Living Waivers to help individuals remain safe and independent in their homes. We also launched innovative community efforts, such as the creation of Nancy’s Nook, a donation center providing essential supplies and equipment to those in need.

In 2023, we achieved significant operational milestones, including a 97% satisfaction rate in consumer surveys and reaching over 56,000 individuals through our social media platforms. Our team also laid the groundwork for future excellence by beginning preparations for NCQA accreditation, a testament to our commitment to high-quality care and service.

These accomplishments reflect our unwavering dedication to improving the lives of the individuals we serve. I am deeply grateful to our staff, partners, and supporters for their contributions to another successful year. Together, we are building stronger communities and creating lasting impacts for those who need us most.

With gratitude,

A handwritten signature in black ink that reads "James C. Endly". The signature is fluid and cursive, with the first and last names being more prominent.

# AAA9 EVENTS 2023 Highlights



## Legislative Luncheon

AAA9 was proud to participate in the Cambridge Area Chamber of Commerce Legislative Luncheon at the Pritchard Laughlin Civic Center. This event provided valuable opportunities to connect with state and local legislators and network with key community leaders.

Attendees heard updates and remarks from:

State Representative Don Jones

State Representative Adam Holmes

Guernsey County Commissioners

Mayor of Cambridge, Tom Orr

Jay Jackson, Mayor of Byesville

AAA9 was represented by Brooke Campbell, Director of Development & Community Options, showcasing our ongoing commitment to advocacy and collaboration in our region.



## O4A Advocacy Conference

AAA9 proudly attended the Ohio Association of Area Agencies on Aging (O4A) Advocacy Conference, where staff gained valuable insights into state budget priorities, legislative initiatives, and federal policy updates. During the event, our team connected with State Senator Al Landis to advocate for a \$20/hour wage for direct care workers—an essential step to ensure older Ohioans waiting for in-home services receive the care they need and deserve.



## Older Adult Extravaganza

AAA9 foundation sponsored event, the extravaganza was well-received by the community and well attended. With over 600 attendees. We look forward to utilizing the event as a foundation fundraising to help those who slip through the cracks and need a little extra assistance.



## Falls Prevention Awareness Day Walk

In honor of Falls Prevention Awareness Day, AAA9 staff took to the streets of downtown Cambridge, walking 1 mile to support the Ohio Department of Aging's #10MillionStepsToPreventFalls campaign.

Carrying signs with impactful messages, we raised awareness about the risks of falls among older adults and shared tips to prevent them, such as exercising regularly, removing home hazards, and getting annual vision and hearing checks.

## USAgging Conference

In 2023, AAA9 leaders had the privilege of attending USAgging's 48th Annual Conference and Tradeshow in Salt Lake City, Utah. This event is the nation's premier gathering of trailblazers in the field of aging, bringing together professionals, government experts, policymakers, and business leaders to exchange innovative ideas and advance aging-related initiatives.

A special highlight of the conference was the celebration of our very own Ciara Harding, Special Program Supervisor, who joined USAgging members in 2022 to enhance her skills as an aging professional through a rigorous three-day Leadership Institute. During the conference, a Leadership Institute Alumni Luncheon honored Ciara's October 2022 graduating class and their remarkable achievements.

Our team returned energized, equipped with new insights, and inspired by connections with aging professionals from across the country. These experiences and ideas will help us continue to improve services for older adults in our nine-county region.



*Pictured L to R: Jim Endly (President/CEO), Ciara Harding (Special Program Supervisor), Brooke Campbell (Director of Development and Community Options), Michele Bates (Vice President of Consumer & Employee Services), Randy Nelson (Vice President of Business Operations)*

# 2023 AAA9 Impact by the Numbers



6,778

CALLS WERE RECEIVED  
BY OBLTSS



694

PASSPORT NEW  
ENROLLMENTS



26

NEW CONTRACTED  
PROVIDERS



8,893

PASSPORT CONSUMER  
HOME VISITS



152

INDIVIDUALS ENROLLED  
IN SPECIALIZED  
RECOVERY SERVICES



1,528

ASSISTED LIVING  
WAIVER HOME VISITS



345

INDIVIDUALS WERE  
SUPPORTED THROUGH  
THE ASSISTED LIVING  
WAIVER PROGRAM



2,374

INDIVIDUALS WERE  
ENROLLED IN THE  
PASSPORT MEDICAID  
WAIVER PROGRAM

## SOCIAL MEDIA REACH IN 2023



56,700

individuals reached on  
Facebook, an increase of  
over 3,000 people from 2022



246

more Facebook followers were  
added in 2023 than in 2022



1,989

total Facebook followers



# DIVISION HIGHLIGHTS



## Development and Community Options Division

The Development & Community Options Division is comprised of two units: the Development & Compliance Unit and the Community Options Unit. The units work collectively to be responsible for:

- ▶ Agency wide planning & development of programs and services compliance, regulation, and reporting to funders
- ▶ Development and implementation of new grants, programs and services non-Medicaid program funds & development
- ▶ Outreach and public relations efforts
- ▶ Advocacy related to populations served and federal and state funding development and maintenance of providers non-Medicaid and Medicaid monitoring and compliance of service providers
- ▶ Special programs offered through AAA9: HEAP, MIPPA, resident service Coordination oversight, and implementation of care coordination programming
- ▶ Oversight and implementation of housing programming, caregiver education, and support programming
- ▶ Incoming calls and intake processes resource development
- ▶ Volunteer development and coordination

## » Community Options

The Aging and Disability Resource Network (ADRN) is the front door to all the services, supports, resources, and long-term care expertise that AAA9 has to offer.

The Ohio Benefits Long-Term Services and Supports (OBLTSS) team is comprised of Information and Assistance Specialists who complete screening and referrals. The Special Programs Team includes reception, evidenced based programming and education classes, programs related to housing assistance & repair needs, volunteer recruitment activities, and caregiver education and support. Community Options seeks out additional grant opportunities to meet the needs of those vulnerable populations we serve.

### Ohio Benefits Long-Term Services and Supports (OBLTSS)

Information and Assistance Specialists are trained to manage all incoming calls seeking resources and services to meet callers' long-term care needs. They assist individuals who wish to apply for Medicaid, Medicare, Part D Extra Help, home energy assistance programs, among other programs. They make internal referrals to programs coordinated through AAA9, as well as external referrals to community partners.



#### CAREGIVER SUPPORT AND EDUCATION PROGRAM

The Caregiver Support and Education Program offers free support for those who provide unpaid caregiving services for older adults or someone with a disability, as well as kinship caregivers. Caregiver Support & Education can assist with one-on-one services, education, outreach, and peer support.

#### HOUSING ASSISTANCE COORDINATOR

A Housing Assistance Coordinator works with individuals who need minor home repairs and modifications to ensure their health, safety and accessibility. Housing assistance program goals are in line with the AAA9 mission working to keep individuals in their homes safely for as long as possible.

Community Options provides information, assistance and referrals to older adults and individuals of all ages with disabilities.







AAA9 serves individuals of all ages by providing access to multiple programs including but not limited to the caregiver program, our chronic disease self-management program, PASSPORT Medicaid Waiver, the Ohio Home Care Waiver, and the Specialized Recovery Services Program.

#### **SUPPORTIVE SERVICES**

The Care Coordination Program serves individuals who are not eligible for a waiver program and need assistance. Qualified individuals with Alzheimer's may be referred for in home services. Qualified caregivers can be referred for services to be provided to the individual they are providing care for.

The Resident Service Coordination grant allows AAA9 to provide service coordination to two qualifying properties that house low-income seniors and people with disabilities.

## 2023 ADRN: BY THE NUMBERS

Focus Areas from ADRN in 2023 included: Building efficiencies around the caller experience and optimal customer service. Resource development and sharing to best serve our callers with the AAA9 service area. Specialized focus on identifying the unmet needs in our communities and bridging any gaps in service availability. Expanding partnerships and collaborative efforts to best serve our populations.



# 5,161

callers were assisted with long term care needs by Ohio Benefits Long Term Services & Supports staff



# 77.1%

of those contacts were for assistance were for persons ages 60+



# 50.84%

of all incoming calls had an identified long-term care need for services and support navigation was provided



# 32.94%

of incoming calls benefited from immediate Information and Referral Assistance with layered planning for future long term care needs

## » Development & Compliance

AAA9 administers a wide array of programs and services aimed at enhancing the quality of life for older adults within Belmont, Carroll, Coshocton, Guernsey, Harrison, Holmes, Jefferson, Muskingum, and Tuscarawas Counties. Various providers may qualify to participate in these programs, offering a range of contracted services to meet the diverse needs of the community.

AAA9 oversees the development and implementation of a Community Needs Assessment (CNA) and Strategic Area Plan (SAP) for our nine-county region. CNA provides a comprehensive analysis of the health and well-being of senior communities, helping AAA9 understand their needs and challenges. SAP is a four-year operational plan designed to prioritize specific collaborative actions and deliver a coordinated service system for older Ohioans. This plan outlines AAA9's intent to provide a broad spectrum of quality services to the community.

The Development & Compliance team is integral to managing PASSPORT and Older American's Act Title III contracts. This includes overseeing and monitoring providers to ensure compliance with standards and quality service delivery. AAA9 contracts providers to deliver a variety of essential services, including Adult Day Service, Assisted Living Service, Community Transition Service, Home Maintenance and Chore, Congregate Meals, Personal Emergency Response System, Home-Delivered Meals, Homemaker Services, Home Medical Equipment, Community Integration, Legal Assistance, Home Modification, Nutrition Consultation, Personal Care, Social Work Counseling, and Medical Transportation.

The Development & Compliance team also focuses on recruiting new agencies to expand service options for older and disabled adults, particularly in remote or underserved areas. Continuous provider recruitment ensures that AAA9 can meet the evolving needs of the communities it serves.



### » Summary of Units Served by Funding Source

|  |                   |
|--|-------------------|
| C1 – Congregate                        | 118,726.79        |
| C2 Home Delivered Meals                | 643,956.57        |
| SBG Meals as You Mend                  | 2,555             |
| IIIB Transportation                    | 88,510.30         |
| IIIB Legal                             | 726.82            |
| IIIB Grocery Ordering and Delivery     | 370.01            |
| IIIB Homemaker                         | 9,669.77          |
| IIIB Personal Care                     | 427.50            |
| IIID Evidence Based Disease Prevention | 6.00              |
| <b>TOTAL UNITS SERVED</b>              | <b>895,589.29</b> |



## MARKETING AND OUTREACH

Marketing and outreach at AAA9 involve setting and executing creative goals aimed at program growth, provider acquisition, and increasing consumer engagement and revenue. Our efforts include press releases, word of mouth, and leveraging social media platforms for promotion.

## ADVOCACY

Advocacy at AAA9 involves coordinating and participating in local and state-level efforts to secure services and funding that enhance the quality of life for older adults and individuals with disabilities within our region.



## SENIOR FARMER'S MARKET NUTRITION PROGRAM

In 2023, AAA9 partnered with senior centers in our region to help facilitate the Senior Farmer's Market Nutrition Program. This program offers eligible individuals with \$50 in produce vouchers to use at authorized vendors. For authorized vendors, we partnered with 22 farmers and 4 market managers. We were able to serve 2,149 people in our 9-county region, which equals 21,490 individual vouchers.



2,149

PEOPLE SERVED IN OUR  
9-COUNTY REGION

=



21,490

INDIVIDUAL  
VOUCHERS

## MEDICARE IMPROVEMENTS FOR PATIENTS AND PROVIDERS ACT (MIPPA)

MIPPA provides federal funding for State Health Insurance Assistance Programs and Aging and Disability Resource Networks to support low-income Medicare beneficiaries in accessing affordable care. This includes:

- ▶ Medicare Part D Extra Help/ Low-Income Subsidy: Assists with Part D premiums and reduces prescription costs.
- ▶ Medicare Savings Program: Helps cover Medicare Part B premiums.

With MIPPA funding, AAA9 conducts outreach and promotes health and wellness initiatives for the aging population. These efforts include billboards, advertisements, and distributing outreach materials at health fairs, community events, and speaking engagements.

## HOME ENERGY ASSISTANCE PROGRAM (HEAP)

HEAP and Neighbor to Neighbor are financial aid programs that support income-qualified individuals, senior citizens, and families in managing utility expenses. The Ohio PIPP Plus Program also helps eligible households maintain utility services by covering some or all of their utility bills.





# Consumer and Employee Services Division

The Consumer and Employee Services Division is comprised of 3 units: the Consumer Services Unit, the Assessment & Managed Care Unit and Human Resources. The units work collectively to be responsible for:

## Assessments

- ▶ PASSPORT Waiver
- ▶ Assisted Living Waiver
- ▶ Long Term Care Consultations
- ▶ Care Coordination
- ▶ Pre-Admission Screen and Level of Care (LOC)
- ▶ Home Choice & Community Living Specialist
- ▶ Residential Supplemental Services Level of Care (LOC)
- ▶ Care Transitions Managed Care Contract Assessments

## NF Transition Coordination

## Pre-Admission Review

## Verbal/Physician Certifications

## Medicaid Specialist

## Eligibility Determination and Enrollment

## Case Management

- ▶ PASSPORT Waiver
- ▶ Assisted Living Waiver
- ▶ Ohio Home Care Waiver
- ▶ Specialized Recovery Services

## Linkage and Referral to Community Resources

## Ensuring Health and Safety

## Provider Referrals/

## Monitoring/Oversight

## Person-Centered Service Plan Development & Monitoring

## Customer Service

## Clinical Quality and Compliance

- ▶ Incident Reporting Management
- ▶ Quarterly Record Review (QRR's)
- ▶ Risk Mitigation
- ▶ Consumer Satisfaction Survey
- ▶ Enhanced/Quality CM Initiatives

## Human Resources

- ▶ Employee Relations
- ▶ Training
- ▶ Benefits Management
- ▶ FMLA
- ▶ Recruitment
- ▶ Onboarding and Offboarding
- ▶ Staff Health Screenings
- ▶ Disaster Preparedness
- ▶ Employee Wellness/Vitality Program
- ▶ Employee Appreciation Activities

AAA9 directly serves over 2,500 case-managed clients and assists over 40,000 older adults through our contracts and grant programs.





### **PASSPORT & ASSISTED LIVING WAIVER**

Our PASSPORT Waiver Program ended the year with a total census of 2,374. We have continued our work of assisting our older Ohioans to remain living independently within their own homes by securing services such as personal care attendants, home delivered meals, medical equipment, transportation, and chore services. By providing these services, AAA9 was able to delay or prevent nursing facility placement for many of these individuals.

Our Assisted Living Waiver program grew in 2023, with an end-of-year census of 345 individuals served. We have been able to provide support and services to permit these individuals to remain as independent as possible within an assisted living facility of their choosing, which combines a homelike setting with personal support. AAA9 has been instrumental in setting up and monitoring those services, which allowed for a less expensive and less restrictive alternative to nursing facility placement. In 2024, we expect to increase the number of individuals served in Assisted Living facilities.



# 2,374

individuals were enrolled in the  
PASSPORT Program as of December 2023

**Our Assisted Living Waiver Program continues to grow, providing support services to permit older Ohioans to remain as independent as possible.**





### BEGINNING AND END OF THE 2023 YEAR CENSUS

This timeframe has been another period of growth for the CM Division. PASSPORT enrolled 694 individuals during the course of the year and Assisted Living enrolled 168. The Ohio Homecare Waiver case managed 340 individuals in 2023, and Specialized Recovery Services enrolled 152 individuals.

| PASSPORT              |       | ASSISTED LIVING       |     |
|-----------------------|-------|-----------------------|-----|
| 2023 Beginning Census | 2,399 | 2023 Beginning Census | 307 |
| 2023 Ending Census    | 2,374 | 2023 Ending Census    | 345 |
| Growth                | -25   | Growth                | +38 |

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| SRSP                  |     | OHCW                  |     |
|-----------------------|-----|-----------------------|-----|
| 2023 Beginning Census | 618 | 2023 Beginning Census | 349 |
| 2023 Ending Census    | 647 | 2023 Ending Census    | 335 |
| Growth                | +29 | Growth                | -14 |



### SERVICES BY THE NUMBERS IN 2023



862

individuals were enrolled in the PASSPORT Program




345

individuals supported through the Assisted Living Waiver Program



2,719

2023 census for PASSPORT and Assisted Living Waiver Program



2,154

initial assessments were completed in 2023, an average of 165 per month (+180 increase)



# Care Management Division

In 2023, the Care Management Division fully returned to performing in-home visits post COVID restrictions. The year began with the establishment of specific goals aimed at state advocacy issues, increasing program enrollments, hiring additional staff, enhancing staff development, recognizing staff achievements, and promoting staff health and wellness. Many of these goals were successfully achieved.



Our goal will always be to provide programs and coordinate services allowing individuals to remain living safely and independently at home and in their community.



## Quality Improvement Strategies/Initiatives

The Consumer and Employee Services Division successfully accomplished its set goals and implemented several improvements and initiatives while continuing to adhere to standardized best practices in 2023.

- ▶ Advocacy/State Workgroups
- ▶ Community Initiatives — Agency Donation Center Created
- ▶ Ohio Association of Area Agencies on Aging (o4a) — Advocacy and Annual Conferences
- ▶ New Staff Meet and Greet



## Advocacy and Community Involvement

### WORKFORCE SHORTAGE

Beginning in 2022, our Agency participated in the ODA advocacy Workforce Shortage Committee focused on finding solutions to provider staffing shortages. Due to the shortage of home healthcare workers, many providers are facing challenges finding personal care attendants to provide needed in-home services. Many individuals were not receiving care or receiving inadequate levels of in-home services to meet their daily needs. In 2023 we are pleased to report that through continued advocacy and collaboration with Ohio Department of Aging and other statewide PAA's improvement was realized on this initiative in the form of an hourly rate increase for direct care workers. With the wage increase in effect it's expected more personal care workers will be available to provide services in the home meaning less interruption or reduced hours of care for individuals in need.



With the wage increase in effect it's expected more personal care workers will be available to provide services in the home.



## AGENCY DONATION CENTER

### Nancy's Nook & Tidy Town

In August of 2023 AAA9 created a charitable donation center initiated as part of our mission to help individuals within the community who are in need with equipment and supplies, they may not have access to otherwise. Through continued and on-going donations from our generous staff, local businesses, and community members, our center collected essential cleaning and hygiene items along with donations of gently used medical and safety equipment. Distribution of these essential items helps bridge the gap of financial disparity and accessibility within our community and positively impacts health and safety.



*The initiative is in honor and remembrance of the late Nancy Schambaugh, an AAA9 staff member.*



*From August to December 2023, our staff delivered over 60 bags filled with essential supplies to older individuals in need.*

## AAA9 Outreach



*Educating Organizations and the Community About Job Opportunities at the BHS Job Fair.*



*Direction Home, Long Term Care Ombudsman Program*



*Elder Abuse Awareness Conference*





## Business Operations Division

As with many of those we serve, AAA9 continued to deal with ongoing impacts related to the pandemic.

Operational and fiscal challenges related to inflation continue to raise our costs significantly. Our team did a tremendous job keeping the organization operationally efficient while ensuring new and existing programs were properly accounted for and within budget.

## Board of Trustees



**Gwen Morgenstern**  
President  
Belmont County

**Jason Jackson**  
Vice President  
Guernsey County

**Joyce Klinger**  
Secretary  
Harrison County

**Peggy Pritz**  
Treasurer  
Tuscarawas County

**Belmont County**  
Leisha Trigg

**Guernsey County**  
Daniel Atkinson  
Connie Hawthorne

**Harrison County**  
Dr. Michael Dundr  
Nan Mattern

**Jefferson County**  
Karen Shilling

**Muskingum County**  
Jeanie Blake

**Tuscarawas County**  
Glenn Enslin  
William Harding

## Regional Advisory Council



**William Harding**  
Chair  
Tuscarawas County

**Edward Florak**  
Vice President  
Jefferson County

**Joyce Sees**  
Secretary  
Coshocton County

**Belmont County**  
Ronald Hopkins  
Joni Fox

**Carroll County**  
Elaine Myers  
Rose Weiss

**Guernsey County**  
Nathaniel Womack, Sr.

**Harrison County**  
Pam Tope

**Holmes County**  
Brandon Irving  
Debbie Jewell  
Kerry MacQueen

**Jefferson County**  
Rev. Michael Bongart

**Muskingum County**  
Regina Jones

## AAA9 Leadership

**James Endly**  
President/CEO

**Michele Bates, RN**  
Vice President of  
Consumer and  
Employee Services

**Val Sampson, LSW**  
Vice President of  
Development and  
Community Options

**Randy Nelson, CPA**  
Vice President of  
Business Operations

**Jud Love**  
Director of Finance

**Amber Clauss**  
Director of Assessment  
and Managed Care  
Programs

**Brooke Campbell, BSN, RN**  
Director of Development  
and Community Options

**Donna Eschbaugh, RN**  
Director of Consumer  
and Employee Services

**Justin Graves**  
Director of Information  
Technology

## Fiscal Year 2023

# FINANCIAL REPORT

### FUNDING

#### Government Support

Federal \$31,968,280

State \$18,784,119

Other Governmental \$3,539

**Total Government Support \$50,755,938**

#### Other Revenue

Non-government \$3,950,551

Program \$555,059

Other \$100,246

Interest \$287,318

Net Investment Income \$209,933

In-kind \$15,325

**Total Other Revenue \$5,118,432**

**Total \$55,874,370**

### EXPENSES


Program \$51,572,972

Management and general \$3,617,224

Fundraising \$25,216

**Total \$55,215,412**

Clark, Shafer and Hackett and Company completed our 2023 audit and released the final report to us in September.



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AAA9 SERVICE AREAS ▶

Belmont | Carroll | Coshocton | Guernsey | Harrison |  
Holmes | Jefferson | Muskingum | Tuscarawas



*Working with people, communities, and  
organizations to help older adults and  
people with disabilities live independently  
and enjoy the highest quality of life possible.*

AAA9 is a non profit Section  
501 (c)(3) organization designated  
by the Ohio Department of Aging  
as one of America's nearly  
700 Area Agencies on Aging.