



**2023**

**ANNUAL  
REPORT**



# ***Our Mission***

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NEI3A helps older persons respond to their evolving needs and choices.

# ***Our Vision***

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Older persons have access to support that empowers them to live with choice and dignity in their communities.



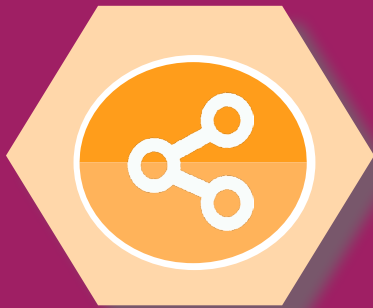


# *Responding to the evolving needs of older adults*

The demographic landscape of America is undergoing a significant transformation, marked by the aging of our population. By the year 2030, a staggering 73 million people, equivalent to one in every five Americans, will have reached the age of 65 or older. Notably, within the last decade, Northeast Iowa Area Agency on Aging (NEI3A) experienced a subtle growth in its overall population while witnessing a remarkable 10% surge in individuals over 60.

Within the 18 counties in NEI3A's service area, 50% of individuals over 60 reside in rural communities. Fiscal year 2023 saw NEI3A extending its assistance to 3,651 individuals living independently and 1,974 individuals facing economic hardship.

This population growth and dynamics of the service area represent a tremendous opportunity to innovate and create new ways to address the needs of the expanding number of older adults. This is why our mission holds an even greater significance today, steadfastly guided by the evolving needs of older individuals. Our unwavering commitment lies in connecting them to a range of service alternatives, empowering them to lead lives of dignity within the communities and environments they personally choose.



Connecting you to services to remain independent



Providing caregiver support



Promoting active aging with health based programs



Enhancing health with nutrition services

# Reflections on Fiscal Year 2023



**Mike Donohue**  
CEO



**Dan Byrnes**  
Board President

In 2023, we witnessed another remarkable year. After enduring three challenging years under the shadow of the COVID pandemic, everything finally reopened, allowing for in-person meetings, events, and the return of public access to offices and senior centers. Throughout this transformative period, our dedicated staff demonstrated incredible resilience.

As the new fiscal year commenced, the strategic planning process, initiated in 2022, surged forward with unwavering momentum throughout 2023. Among the triumphs of this Strategic Plan was the creation of a comprehensive NEI3A service guide and accompanying video resources. What began as a means to educate the staff on the agency's programs and eligibility criteria soon blossomed into a valuable marketing tool, enabling us to collaborate effectively with partners and enhance their awareness of the full spectrum of services and offerings provided by our agency.

The agency took significant steps in advancing its Diversity, Equity, and Inclusion (DEI) initiatives, championed by a dedicated team of employees representing various programs within the organization. Quarterly, comprehensive all-staff training sessions were conducted, LGBTQ signage was placed on all of our office locations and vehicles as well as on printed materials. These efforts collectively conveyed our agency's commitment to being an inclusive and welcoming place for all. Furthermore, the committee undertook a thorough review of the agency's benefits, actively seeking input from our staff to propose beneficial changes.

Our two national resource centers – State Health Insurance Program Technical Resource Center (SHIP TA Center) and the Senior Medicare Patrol Resource Center (SMP Resource Center) - continue to provide their expertise to help centers across the 50 states and the District of Columbia, Guam, Puerto Rico, and the U.S. Virgin Islands. Notably, the SMP Resource Center orchestrated their highly successful second annual Medicare Fraud Prevention Week, taking place from June 5 through June 11. Meanwhile, the SHIP National TA Center joined forces with AARP to champion SHIPs on a national level through a Medicare summit in October 2022. The SHIP TA Center expanded its team of experts by welcoming two new members, with the addition of a Resource Manager and an Education Development Manager, bolstering their capacity to provide even more comprehensive support.



As we ushered in 2023, a fresh challenge arose for the older individuals we serve. The escalating inflation rates added an additional burden to their already modest budgets. With the conclusion of COVID-related funding and stagnant financial resources, coupled with the ever-rising costs of programming, the agency found it necessary to introduce a waitlist for home-delivered meals as well as the caregiver respite program. A strategic planning committee has embarked on the task of crafting a comprehensive reorganization plan for the agency, with a focus of finding efficiencies that can funnel savings back into programming to reduce or eliminate the presence of waitlists across our agency.

Looking back over this past fiscal year, we cannot be prouder of the flexibility of our staff and volunteers for being able to adapt quickly to the constant changes that have occurred and still are. We are also thankful to the board of directors for the guidance and input they bring back from their communities throughout Northeast Iowa.

Looking forward, we will continue to serve your communities by offering older individuals the services they need to remain independent – adapting to the ever-changing needs of those we serve.

- Mike Donohue, CEO

- Dan Byrnes, Board President

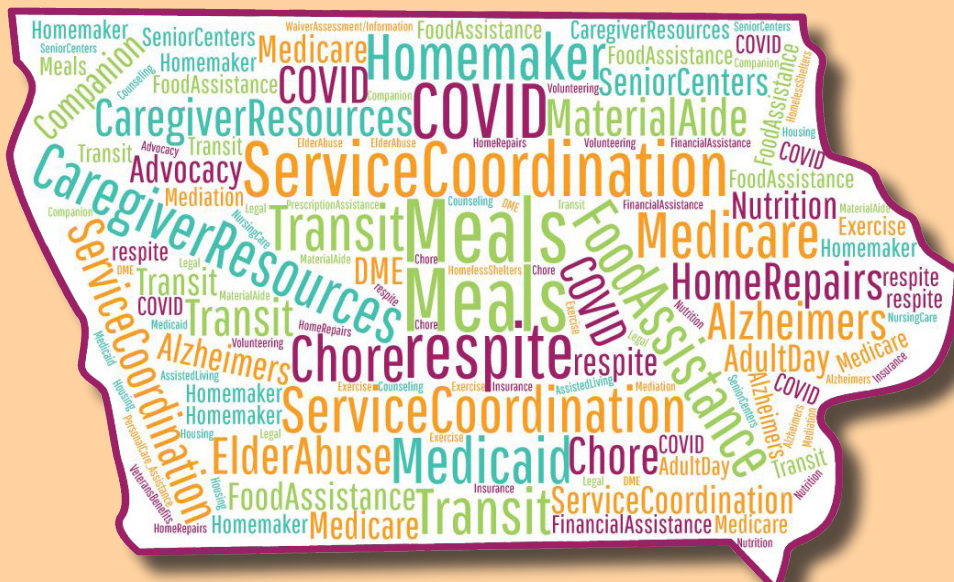
## 2023 NEISA Board of Directors

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- ◆ Les Askelson, *Winneshiek*
- ◆ Jacob Bates, *Black Hawk*
- ◆ Dan Byrnes, *Allamakee*
- ◆ Sally Davies, *Jackson*
- ◆ Diana Dawley, *Poweshiek*
- ◆ Julie Hinders, *Black Hawk*
- ◆ Kari Harbaugh, *Clayton*
- ◆ Jean Maddux, *Black Hawk*
- ◆ Janell McElree, *Fayette*
- ◆ Patrick Murray, *Howard*
- ◆ Greg Orwoll, *Dubuque*
- ◆ Connie Perry, *Hardin*
- ◆ Chelsea Petersen, *Bremer*
- ◆ Kayla Reyes, *Black Hawk*
- ◆ Valerie Schwager, *Black Hawk*
- ◆ Amanda Stahley, *Fayette*
- ◆ Katie Thornton-Lang, *Grundy*
- ◆ Jessie Tibbott, *Delaware*
- ◆ Shannon Zoffka, *Tama*



## Connecting you to services *to empower you to remain independent.*





# Answering the Call

*-providing assistance navigating available services.*

Most of the aging population prefers to continue living in their homes for as long as possible. According to the AARP, nearly 90 percent of adults over 65 want to remain in their current homes as they grow older.

Older adults who choose to age in place may find that they need supports in place, but do not know where to go for this information. At NEI3A our Information and Assistance specialists and Options Counselors have the knowledge necessary to develop long-term care plans and improve quality of life for older adults.

Lifelong Links, through Iowa's Aging and Disability Resource Center provides a single point-of-entry resource for anyone seeking information regarding assistance for older persons, persons with disabilities, veterans, and caregivers. In fiscal year 2023, Information and Assistance Specialists assisted 3,652 individuals and 711 caregivers to connect them to vital resources and community programs to help them remain independent. Call topics range from needing home delivered meals, transportation, homemaker, and benefits screening to determine eligibility for programs that assist with medical costs. Often the I&A specialist may refer on to an NEI3A Options Counselor to assist with more complex issues to provide additional advocacy and service coordination.

Along with utilizing our toll-free numbers to contact NEI3A, we provide alternative ways for individuals to search for services and connect with an Information and Assistance Specialist. Lifelong Links includes an online searchable database available to the public 24/7. Consumers can search by county and the services they are seeking to gain a list of agencies and providers available. A live chat feature is also available during regular business hours on the Lifelong Links website. Individuals are also able to directly connect with I&A staff via a request for information on-line form found on our agency website. In 2023, 329 web requests were received and responded to. NEI3A continues to answer the call to help individuals navigate through a system of support and resources to remain independent.







# Supporting Caregivers

through the caregiver journey

## 2023 CAREGIVER UNITS

**758**   
Counseling

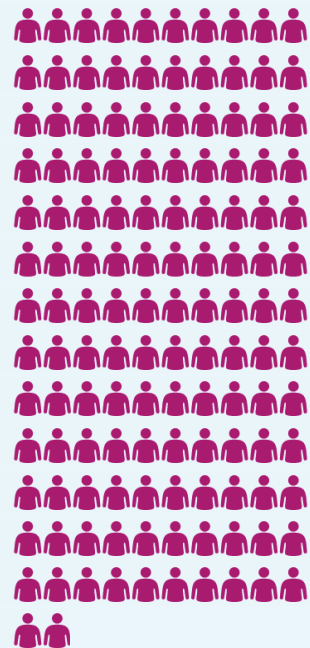
**1,215**   
Information & Assistance

**1,142**   
Case Management

**374**   
Options Counseling

 = 100 units

**13,173**  
Respite Hours





## ◆ Supporting Caregivers *in their caregiver journey*

According to the National Alliance for Caregiving and the AARP Public Policy Institute, 53 million Americans provide unpaid care for an adult family member or friend with critical health care needs. This encompasses 1 in 5 Americans. Yet few of these identify themselves as caregivers. Often, the things that define being a caregiver, such as helping a parent organize their medications or taking a friend to their doctor's appointments, seem like simply doing what needs to be done when someone needs help. For some, the care can progress, and suddenly, the caregiver feels the large commitment and balancing act they are experiencing.

Caregivers face many challenges, and NEI3A strives to build their support network to carry out their obligations of keeping adults safe and secure. NEI3A's caregiver program provides informative options for care and support, case management, and emotional support through informal counseling, support groups, respite care, and education and training opportuni-

In fiscal year 23, 771 caregivers were provided with 1,215 units of information and referral assistance. Additionally, NEI3A Caregiver Specialists delivered options counseling and support group facilitation to 146 caregivers. Case management for ongoing advocacy and care planning was provided to 154 family caregivers, which included funding for 13,173 hours of respite services to reduce stress and burnout. NEI3A Caregiver Specialists logged 758 contacts to family caregivers for time spent providing reassurance and emotional support.

*"There are only four kinds of people in the world. Those who have been caregivers. Those who are currently caregivers. Those who will be caregivers, and those who will need a caregiver."*

- Rosalyn Carter

As social isolation remains a concern amongst older adults, we continue our partnership with GrandPad by leasing 50 devices to keep them connected. The easy-to-use and secure tablet does not require internet service while allowing the use of many features such as video calls, email, sharing photos, music, games, and current event articles. It keeps our consumers engaged and connected to their family and friends.

To continue our focus on self-care for caregivers, NEI3A continues to offer an evidenced-based Powerful Tools for Caregivers class, Caregiver Wellness Days, and online training and education. Powerful Tools is a weekly class held for six consecutive weeks focusing on caregiver self-care. In FY23, NEI3A raised awareness with three Caregiver Wellness Events across our PSA to recognize how valuable caregivers are. We also collaborated with Trualta, an online platform for caregivers to view short modules tailored to their caregiving situation and needs. Through these activities, 66 caregivers were served, including 506 direct hours of caregiving-related education and training. Through partnerships within our communities in the NEI3A service area, we continue to build and strengthen the support we can provide caregivers.



## Promoting Active Aging *with health based programs*

Our commitment to health-based programming is stronger than ever. We understand that finding the opportunity and motivation to remain active can be challenging and have been working to bring evidence-based programs to older adults. In fiscal year 23 we offered 23 classes in fall prevention and chronic disease self-management, as well as community based physical activity opportunities, Seniors in Motion. We understand that bringing people together to participate in group-based physical activity can help increase socialization and provide the motivation to join a group of friends and exercise.

This doesn't mean we are stopping our virtual programming, though. We continue to offer Tai Chi for Arthritis and Fall Prevention, Chronic Disease Self-Management, and exercise programming via Zoom. We are encouraging participation in these virtual classes for individuals who find it difficult to travel, or want to maintain their level of activity during our colder winter weather.

We were fortunate to have an Occupational Therapy Doctoral student work with us in our fall prevention programs this year. She was able to recruit 9 additional volunteer coaches for our Matter of Balance program. This expansion will enable us to provide more classes, benefiting two rural counties.



# Enhancing Health *with nutrition services*

Our nutrition program services remain highly sought after, with our Iowa Café partners offering a flexible dining experience that caters to both the culinary preferences and schedules of our valued consumers. They often express their gratitude for the chance to enjoy meals with friends and family at local restaurants.

We've introduced an innovative approach to congregate meals, piloting it successfully in two locations. We're confident that this model can be extended to other areas, reaching underserved and rural communities, enabling us to better serve older adults. By collaborating with local groups or organizations, such as churches, libraries, and community centers, we aim to expand our outreach significantly. These meals are "gourmet" boxed lunches and provide more flexibility than our traditional senior centers/meal sites.

This past year has presented us with a unique set of challenges, primarily due to the rising demand for home-delivered meals and increased meal costs. To address this, we've implemented a waiting list and a system for prioritizing consumers based on their needs. We constantly assess the most efficient ways to ensure meals reach as many people as possible while continuously evaluating our home-delivered meal program for increased efficiencies.





# Empowering individuals *to live with choice and dignity*

## Person Centered Funding

NEI3A's Person Centered Funding is a comprehensive care management program where Aging Specialists work with individuals and their families to assess their specific needs, develop a care plan to address those needs, and identify resources and funding to implement their care plan. Services funded through this program include case management, chore, homemaker, home modifications and repairs, lifeline, personal care assistance, and transportation.

## Iowa Return To Community (IRTC)

IRTC is a specialized program designed to help older individuals make a smooth transition home from a hospital or care facility and reduce readmissions. NEI3A currently has a partnership with Unity Point hospitals and clinics in Waterloo, Marshalltown, and Grundy Center, with plans to expand with other healthcare systems.

## Elder Abuse Prevention and Awareness (EAPA)

Elder Abuse is one of the most significant, under-reported, and under-recognized social problems in our country, and every year 1 in 10 older Americans experience some form of abuse, neglect, or exploitation. Elder abuse can take many forms such as physical, emotional, and sexual abuse as well as neglect and financial exploitation. Sadly, victims of abuse are at increased risk for health problems, hospitalizations, nursing home placements and premature death.

The EAPA Program provides services to adults aged 60 and older who are experiencing, or at risk of experiencing, abuse, neglect, or exploitation. Elder Rights Specialist meet with individuals to identify risks, or potential risks, develop intervention and safety plans, and coordinate services to reduce or eliminate those risks. Last fiscal year NEI3A provided EAPA services to 76 older adults and invested over \$19,000 in services and supports to reduce/prevent abuse.

Raising awareness about elder abuse in our communities is one of the key goals of the EAPA program. The EAPA team provides trainings and education to law enforcement, healthcare providers, social workers, and community groups. We host and participate in outreach events such as health fairs and World Elder Abuse Awareness Day events. We also serve as a resource for professionals who work with older adults. Last year we reached over 6,500 individuals through our outreach efforts.







## Educating people and communities to help make Iowa a place where people with dementia can thrive.

The second year of the Dementia Friendly Iowa statewide initiative is gaining significant momentum. This program has been instrumental in educating community members and organizations about dementia through comprehensive Dementia Friends sessions and Dementia Friendly Organization/Business training.

Statewide, a total of 3,708 people became Dementia Friends at the 251 sessions held throughout the state. In addition, 92 Champion Volunteers, including professionals, past and current caregivers, students, and community members, were trained to present these educational programs.

A remarkable 56 new businesses and organizations joined this vital initiative. Notable additions include the Iowa Department of Public Safety, Cedar Falls Utilities, financial institutions, beauty salons, physical therapy and healthcare clinics, volunteer groups, faith-based communities, senior centers, universities, high school classes, EMS/law enforcement agencies, fire departments, libraries, and many others. All these entities underwent staff training and became recognized as a "Dementia Friendly Organization or Business."

On a community level, two new Dementia Friendly communities officially launched in Dubuque and Johnson County. In addition, two new action teams began forming in Delaware County and Bettendorf. Dementia Friendly Cedar Valley continues progressing, and technical assistance was provided to Dementia Friendly Vinton and Maquoketa.

# 56

*Businesses and organizations recognized as Dementia Friendly*



# 3,708

*people became Dementia Friends*





## Special Projects



# SHIP

State Health Insurance  
Assistance Program

Navigating Medicare



# SMP

Senior Medicare Patrol

Preventing Medicare Fraud



# Providing Support *across the country*

NEI3A is proud to house two national resource centers: the SHIP Technical Assistance Center (SHIP TA Center) and the Senior Medicare Patrol Resource Center (SMP Center). The two national centers provide resources and services for each of the 50 states and the District of Columbia, Guam, Puerto Rico, and the U.S. Virgin Islands.

## National State Health Insurance Assistance Program Technical Assistance Center (SHIP TA Center)

The SHIP TA Center helps NEI3A meet its mission by helping older persons respond to their evolving Medicare needs and choices – not just in Iowa, but nationally. Through a competitive federal grant from the U.S. Administration for Community Living (ACL), it serves two major audiences: The national Medicare public, and the 54 State Health Insurance Assistance Programs (SHIPs).

All SHIPs nationally provide local unbiased help navigating Medicare for Medicare beneficiaries, their families, and caregivers. Medicare education sessions and individualized Medicare counseling for Iowans are provided by the Iowa SHIP, not by the staff of NEI3A's SHIP TA Center.

**The SHIP TA Center's website, [www.shiphelp.org](http://www.shiphelp.org), educates the public about SHIP and helps the public find their SHIP.** This site was visited 834,634 times and 1.5 million individual web pages were viewed in the past year. On this site and elsewhere, we advertise our national toll-free number for helping the public find their local SHIP. Over 15,500 people called this toll-free number in the past year (24% annual increase).

You can also find the SHIP TA Center on Facebook and YouTube. We use these media channels to promote SHIP services and explain how we can help them find local and individualized Medicare help.

**The SHIP TA Center provides training and technical assistance to SHIP programs, such as in these ways:**

- 1. Password-protected website for SHIP staff and volunteers.** Over 11,000 SHIP personnel were active users of our website in the past year. There, they access resources to help them do their work. In the past year, SHIP personnel logged in 112,000 times (29% annual increase).
- 2. Online Counselor Certification and Training tool.** SHIP counselors used courses and certification tests in this tool nearly 54,000 times in the past year (35% annual increase).
- 3. Medigap comparison tool.** This password protected Medigap Supplement plan comparison tool for SHIPs compares Medigap options and costs based on individual circumstances. SHIPs used this tool over 31,000 times in the past year (17% annual increase).
- 4. Data System.** We provide training and technical assistance for all 12,000+ users of the SHIP national data reporting system, called STARS. STARS data informs the federal government's SHIP reports to Congress.
- 5. Webinars.** We provide webinar training on all aspects of SHIP operations, often in collaboration with the national Senior Medicare Patrol (SMP) Resource Center at NEI3A. In the past year, we offered 44 webinars that were attended by nearly 10,000 SHIP personnel (66% annual increase).
- 6. Written training.** We write and publish monthly newsletters where we feature successful practices, Medicare news, and our training materials. 7,140 SHIP personnel subscribe to our newsletters (17% annual increase).

7. **Medicare Minutes.** These monthly education packages are produced by our major partner, the Medicare Rights Center. Together with the SMP Resource Center, we distribute them to SHIPs and SMPs nationally for educating local audiences about Medicare. They also form the basis of our monthly blog at [www.shiphelp.org](http://www.shiphelp.org).
8. **One-on-one Technical Assistance.** We provide one-on-one technical assistance on all aspects of SHIP operations. 53 of the 54 SHIPs relied on us for one-on-one technical assistance in the past year.

### Special projects worth noting:

- **AARP Collaboration.** The SHIP TA Center collaborated with AARP to promote SHIPs nationally, particularly through an October 2022 national Medicare summit. This virtual event was modeled after the SHIP TA Center's 2021 Welcome to Medicare Virtual Fair. The AARP-hosted event featured SHIP presenters and served over 4,000 people. This partnership enabled the SHIP TA Center to double the reach of such an event at no cost to us.
- **Social Media campaign to recruit SHIP volunteers.** We conducted a paid Facebook and Google campaign to promote the value of volunteering for SHIP that recruited over 200 prospective SHIP volunteers.
- **Hired two new staff.** To keep up with increasing demand for our services and for innovation, the SHIP TA Center hired a Resource Manager and an Education Development Manager in July 2023. You can read more about them and the other SHIP TA Center staff in the About menu at [www.shiphelp.org](http://www.shiphelp.org).

## Senior Medicare Patrol National Resource Center (SMP Center)

The SMP Center, under the direction of the U.S. Administration for Community Living (ACL), serves 54 SMP projects nationally. The SMP Center's primary goals are to provide professional expertise, training, and technical assistance to the SMP projects and promote national visibility for the SMP program to assist the public in locating their state SMP project and to bring awareness and prevention on trending Medicare fraud schemes. In 2022, SMP had 5,365 active team members. Those SMP team members conducted 18,274 group outreach and education events and 246,722 individual sessions with, or on behalf of, Medicare beneficiaries.

The SMP Center supports training and resources for ACL's SMP national data system, casework, successful practices, Volunteer Risk and Program Management, Center platforms, SMP-specific roles, and "how-to" topics based on program needs. The SMP Center maintained a national SMP website, [www.smpresource.org](http://www.smpresource.org), and a password-protected SMP Resource Library and learning management system, TRAX: Training Tracker, containing 1,660 resource entries for 7,666 users.

The SMP Center's public-facing website houses resources, news, and videos to educate beneficiaries and their families about pressing Medicare fraud trends. It includes links to the Center's Facebook, Twitter, Instagram, and LinkedIn accounts, which are updated regularly.



## Some of the SMP Center's main initiatives for this NEI3A fiscal year included:

- SMP national website moved to new platform.
- Released updated materials on SMP Counselor Training (manual, kit, and self-paced training).
- Translated additional materials, including tip sheets, videos, and the My Health Care Trackers.
- Development of four ongoing publications that serve the public, the Aging Network, and SMP and SHIP professionals.
- Added 92 news items to the website.
- Diversity, equity, and inclusion self-paced training development (to be released in March 2024).
- National media (ProPublica, Bloomberg, Politico, Kaiser Health News, Kiplinger).
- The SMP Center has also had success with outreach using social media. Since July 2021, the Center's Facebook page has had 433 posts and has seen a total reach of 1,641,40 people. There have also been 342 new page likes. The Center had 4,568 total shares and 61,247 total public engagements. This year the SMP Center developed 52 new infographics.
- Remote patient monitoring (RPM) fraud schemes work group with national partners.
- SMP mobile application: Secured FISMA contractor and potential cyber insurance providers.
- Hosted 27 webinars, including:
  - Plain language and health literacy webinars
  - Medicare marketing (Can They Do That) webinar
  - Volunteer management and recruiting webinars
  - Social media webinar
  - Monthly networking calls with SMP directors from around the country

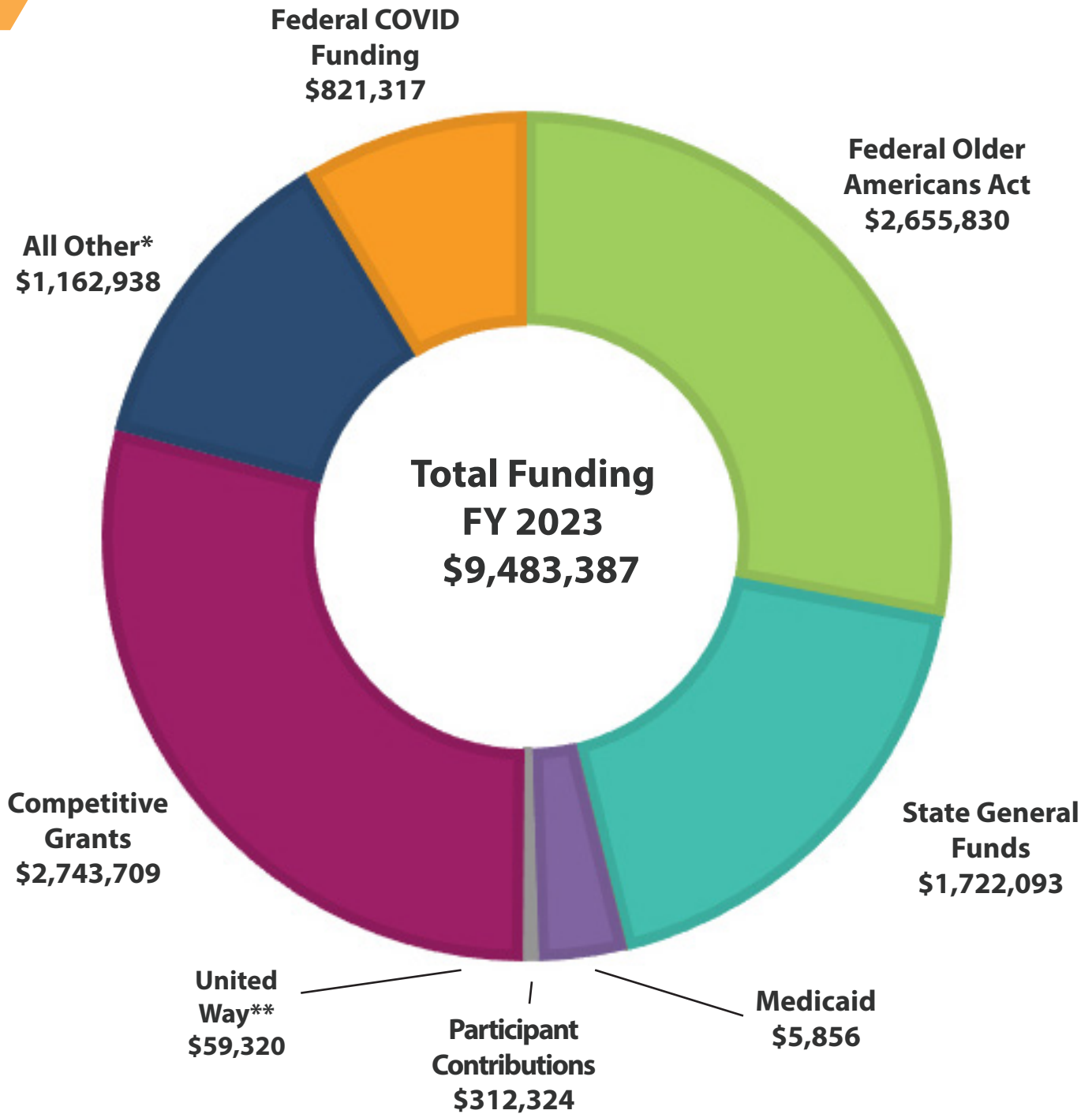
## Medicare Fraud Prevention Week SMP Center Results

The SMP Center hosted the second national Medicare Fraud Prevention Week June 5-11 this year. This event was promoted by ACL, the OIG, FTC, Social Security OIG, and many more partners.

The event was promoted on Google, Facebook, Spotify, and PR Newswire a month before the event, resulting in the following:

- Google results: 56,500 clicks, 52,800 conversions (traffic to the website), and over 7 million impressions, with an overall cost of 16 cents per click.
- Facebook results: 1,297,455 million people reached and 13,551 landing page views, with an average cost per click at 70 cents.
- Spotify results: 991,988 reach, 1,099,481 impressions, and 3,798 clicks to our website, with an average frequency (the average number of unique listens) of 1.09.
- PR Newswire results: Three pickups (placements and exact match pickups), 3,518 views, 2,260 multimedia (including web crawler hits, plays, and downloads), and 104 engagements (the total number of click-throughs, email shares, posts to social media and print actions). This doesn't include the data for all the potential views from the pickups or AP outlets.

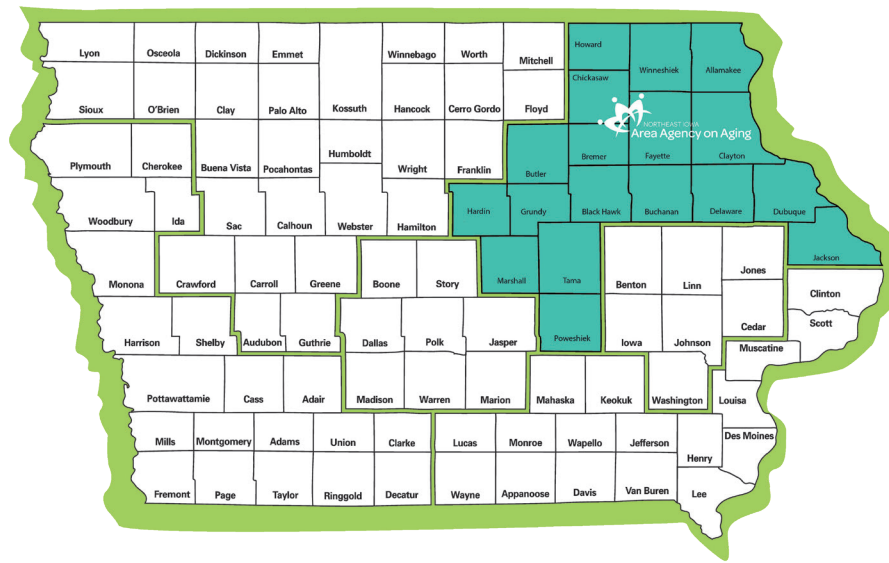
# Sources of Funding



**In Kind Contributions: \$390,477  
(includes only labor)**

*\*Includes fundraising, private contributions and other local cash  
\*\*Includes United Way of Cedar Valley, Dubuque, Winneshiek County, and Marshall County*





## 2023 Area Advisory Committee

- Marcia Bauer, Black Hawk
- Bob Brown, Black Hawk
- Rosie Bruns, Black Hawk
- Sandy Chilson, Howard
- Lori Egan, Winneshiek
- Lamoyne Gaard, Poweshiek
- Jerry Gade, Grundy
- Sharon Harms, Grundy
- MacKenzie Jaeger, Dubuque
- Heather Levinson, Winneshiek
- Margaret Mjones, Dubuque
- Mary Peters, Dubuque
- Linda Ridihalgh, Fayette
- Brian Schoon, Black Hawk
- Linda Von Holten, Marshall
- Kelsey Umthun, Black Hawk
- Ron Welper, Black Hawk

NEISA serves older adults, caregivers, and persons with disabilities in Allamakee, Black Hawk, Bremer, Buchanan, Butler, Chickasaw, Clayton, Delaware, Dubuque, Fayette, Grundy, Hardin, Howard, Jackson, Marshall, Poweshiek, Tama, and Winneshiek Counties.

In accordance with the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973 and the Aging Discrimination Act of 1975, it is the policy of Northeast Iowa Area Agency on Aging to provide services to all persons eligible under the provisions of the Older Americans Act of 1965, as amended, without regard to race, creed, color, religion, national origin, sex, sexual orientation, handicap, or age.





NORTHEAST IOWA  
**Area Agency  
on Aging**

## *Regional Offices*

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