



advocacy | action | answers on aging



National Association of Area Agencies on Aging

ANNUAL REPORT
2014–2015

Our Mission

The National Association of Area Agencies on Aging's primary mission is to build the capacity of our members so they can help older adults and people with disabilities live with dignity and choices in their homes and communities for as long as possible.

Our Vision

Build a society that values and supports people as they age.

In 1975, with one paid staff member and a hands-on Board of Directors, n4a was established, hosted its first national conference and started accepting dues from members nationwide.

Like our member agencies that evolve and grow in response to changes in their communities, n4a has evolved as well over the last 40 years, to better meet the needs of our members and the aging population. Now, with nearly 40 full-time staff positions, n4a has grown considerably from its early days, yet we remain a relatively small national association—but mighty in network, heart and cause. For 40 years, n4a has been the voice in Washington and the convening body for the 623 Area Agencies on Agencies across the country. Since 1988, n4a has been a vocal advocate for the more than 250 Title VI Native American aging programs that serve our nation's Indian elders.

Over time, the work of our association has expanded well beyond the advocacy and conference hosting that was our focus in the beginning. We now manage programs to help spur innovation and sharing related to critical issues like transportation, volunteerism and Livable Communities. The Eldercare Locator Call Center continues to grow in size and call volume, now receiving about 1,000 calls per day from consumers seeking information and assistance. As the Network tackles new opportunities, n4a also provides valuable technical assistance to members on building the capacity of their agency, providing integrated care and expanding into the realm of private pay. We continue to provide cost-effective ways for members to learn and share from one another via conferences, our newly redesigned website, online training, awards programs, grant opportunities and more.

Today, our association looks different than it did 40 years ago, but our mission and that of our members remains as steadfast as ever: to help older adults and people with disabilities live with dignity and choices in their homes and communities for as long as possible.



Joe Ruby, President



Sandy Markwood, CEO

A stylized, handwritten signature in blue ink, likely belonging to Joe Ruby.

A handwritten signature in blue ink that reads "Sandy Markwood".

BY THE Numbers

24/7/365 n4a serves as the membership association representing America's national network of **623 Area Agencies on Aging (AAAs)** that develop, coordinate and deliver aging services in every community and provide a voice in the nation's capital for the **256 Title VI Native American aging programs**, that provide nutrition, supportive and caregiver services to older American Indians, Alaska Natives and Native Hawaiians.

On average, through Older Americans Act programs and services alone, the Aging Network annually...

11 SERVES  **MILLION**
people

30 PROVIDES  **MILLION**
rides to the doctor, store
and other appointments

240 SERVES  **MILLION**
home-delivered or
congregate meals

In addition to meals and rides,

Area Agencies on Aging provide on average **15 other critical, stand-alone services** to help enable older adults to remain in their home and community, such as information and referral, personal care, homemaker services, caregiver support, health and wellness and elder rights.



To support our members and their community work on behalf of older adults and people with disabilities, n4a ...

> Administered grant-funded programs on **Capacity Building, MLTSS, Transportation, Livable Communities, Volunteerism and Medicare Enrollment** that provide technical assistance and national insight on subjects critical to our members, as well as operated a National Call Center to connect consumers to local resources.

> Provided training opportunities for over **1,000** attendees at n4a events and over **2,000** registrants for n4a webinars.

> Members and staff were a part of over **250** meetings with lawmakers on Capitol Hill advocating on behalf of older adults.

> n4a staff presented or provided training at more than **50** events in **30** states for members and other professionals across the country.

> Connected over **270,000** older adults, caregivers and professionals to Area Agencies on Aging, Title VI programs and other Aging Network resources via the Eldercare Locator.

n4a provides our members with a national voice, advocacy support and the ability to advance stronger aging policy, together.

PUBLIC POLICY & ADVOCACY

All politics may be local, as the saying goes, but the decisions made by federal policymakers in Washington, DC have a tremendous impact on our members' ability to serve older adults and caregivers in the most effective, efficient and fiscally sound ways. Policy can be made by action or neglect, but it all has consequences.

That's why n4a is based in DC. In our advocacy work, one of n4a's most important tasks is to educate federal elected officials about the impact of budgetary and policy decisions on older Americans and family caregivers. We also build our members' advocacy capacity by offering timely legislative analyses and updates, grassroots training and support, and educational events.

IMPACT

> **As leaders in the national aging community**, n4a helped advance a bipartisan Older Americans Act reauthorization bill, prevent cuts to OAA funding in FY 2015 and secure continued mandatory funding for outreach and assistance to low-income Medicare beneficiaries. We also have been a key national voice in promoting and defending stronger policies in health care, transportation, Livable Communities and more.

> **Our Policy Priorities**, combined with complementary grassroots tools that make the case

for our agenda, help our members speak in a unified, powerful voice for older adults and caregivers. n4a's new publication, "Area Agencies on Aging: Local Leaders in Aging and Community Living," has been used thousands of times by our members to explain to local, state and federal decision-makers what AAAs do and to make the connection about why that work is critical to their older constituents.

> **We reached out** to every AAA and Title VI program with distinct calls to action over the course of the year, and provided our members with an equal number of *Legislative Updates*, offering them behind-the-scenes analysis of our top policy issues. Dozens of **policy presentations** were made at state and local AAA conferences and meetings, and we also conducted several webinars to help our members stay up to speed and engaged as advocates.

> **The 21st annual n4a Aging Policy Briefing & Capitol Hill Day** brought together 150 AAA and Title VI Native American aging program executives and staff, local and national aging advocates and aging policy experts in Washington, DC from April 20-21, 2015. The record-setting attendance reflected the critical need for advocates for older adults to understand current aging policy issues and to educate Members of Congress about the important work being done in communities across the country.



Representatives from North Carolina AAAs meet with Senator Thom Tillis (R-NC) during n4a's Aging Policy Briefing & Capitol Hill Day

n4a administers a variety of grant programs on issues of interest to our members and the older adults, people with disabilities and the caregivers they serve.

ELDERCARE LOCATOR

The Eldercare Locator is a National Call Center and website (www.eldercare.gov) that connects older adults, caregivers and people with disabilities to local aging agencies that provide information and resources to help older adults live in their home and community. Funded by the Administration on Aging, the Call Center operates five days a week from 9:00 a.m. to 8:00 p.m. ET.

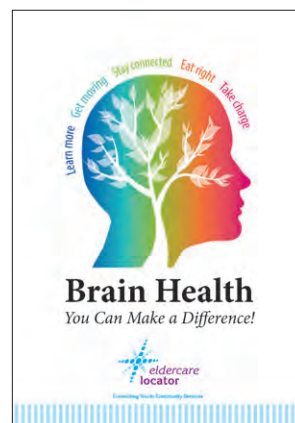
three millionth call in February 2015 and volume rose to an all-time annual high of 271,234 calls per year, or 22,000 inquiries a month.

> **The Eldercare Locator 2014 Home for the Holidays campaign** centered on the publication “Brain Health: You Can Make a Difference!” which quickly distributed nearly 5,000 copies after its release. The brochure, produced in collaboration with the Administration for Community Living, the National Institutes of Health and the Centers for Disease Control and Prevention, provides tips and resources for those interested in supporting brain health as they age, and was showcased in a story by *The Washington Post*.

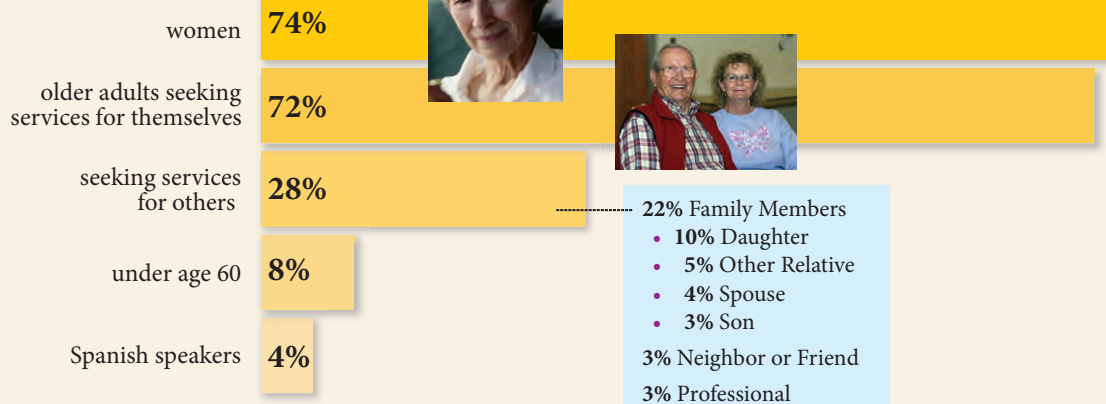


IMPACT

> **The past year has been a record-breaking one** for the Eldercare Locator in a number of ways. Renowned as the only national information and referral resource to provide support across the spectrum of issues affecting older Americans, the Locator received its



Who is Contacting Us?



> **For the first time ever, in-depth data** culled from requests for assistance received by the Eldercare Locator in 2014 was publicly released. “The 2014 Eldercare Locator Data Report: A Snapshot of Older Adult Issues & Needs in America” provides a fascinating window into who is contacting the Locator and why. The report, which revealed that requests for assistance

overwhelmingly came from women, also found that difficulty gaining access to transportation and affordable housing were among the top reasons for contacting the Locator. There was extensive media interest in the report’s findings including national stories in *USA Today* and Reuters.

> **Learn more** at www.n4a.org/eldercarelocator.

MLTSS & INTEGRATED CARE

n4a serves as the lead on the Administration for Community Living (ACL)–funded Aging and Disability Partnership for Managed Long-Term Services and Supports (MLTSS). This partnership between n4a, the National Disability Rights Network, the Disability Rights and Education Defense Fund, Justice in Aging and Health Management Associates works to leverage the Aging and Disability Networks’ infrastructure, service capacity and expertise to ensure the delivery of efficient, high-quality MLTSS to older adults and people with disabilities. The partnership provides training and

technical assistance so that agencies can bridge the gap from their current service models to MLTSS models.

IMPACT

> In partnership with ACL, John A. Hartford Foundation and Partners

in Care Foundation, **n4a helped facilitate and graduate the first group of the ACL Business Acumen Learning Collaborative** in December 2014 and launched the second group in January 2015. The goal of the Learning Collaborative is for each of the participating networks to have at least one new contract with an integrated care entity by the end of the collaborative.

> **Strengthened partnerships with managed care organizations** and other health care industry representatives through n4a’s Managed Care Advisory Council (MCAC). n4a and the MCAC worked collaboratively to provide training and technical assistance to the Aging and Disability Networks for MLTSS.

> **Distributed MLTSS Weekly Update**—an online newsletter with updates on Medicaid and Medicaid Managed Care state policy trends specifically selected for the Aging and Disability Networks—to over 450 recipients weekly.

> **Learn more** at www.n4a.org/mltssintegratedcare.



TRANSPORTATION

The provision of transportation options remains one of the most critical factors to ensure older adults can remain in their home and community. n4a and its partners provide local senior and disability transit providers with training, technical assistance, funding opportunities and shared practices. Funded by Federal Transit Administration (FTA), n4a and Easter Seals co-administer the National Center on Senior Transportation (NCST), a national resource center dedicated to providing increased transportation options to older adults and people with disabilities. Additionally, n4a is a partner on the Inclusive



Coordinated Transportation Partnership Project to support development of sustainable, replicable models for engaging older adults in planning, developing and operating transportation services.

IMPACT

> Over the past year, n4a has emerged as **a leader on the issue of the nexus between transportation and falls prevention**. Some of the nation's top experts were asked to participate in a webinar to discuss innovative strategies for enhancing the safety of older adults when they use public transportation, including educating transportation drivers about the prevalence of falls in older adults and the crucial role they can play in preventing them. The webinar attracted 185 attendees and another 1,000 people viewed the recording, making it one of the most successful n4a webinars of the year. Also, in collaboration with the American Occupational Therapists Association and others, materials were developed to help educate drivers, older adults and aging professionals in Virginia and Massachusetts about the relationship between transportation and falls prevention.

> **Ladders of Opportunities grants**, intended to increase the safe use of public transportation by older adults, were given to five communities. In partnership with professionals who provide care transitions, long-term services and supports and other resources to help people age-in-place in their communities, this initiative provides information and counseling to older adults about their transportation options. Grant recipients will track the number of people who receive mobility counseling and the rate of interest in and actual usage of public transportation by older adults.

> **The second NCST Mobility Fair was among the most well-received events** at the n4a 39th Annual Conference & Tradeshow. Participants shared insights about transportation challenges in their communities and learned about successful approaches for addressing those problems. They also gained a heightened understanding of how to build their technical expertise by leveraging the many tools and resources available through the NCST.

> **Learn more** at www.n4a.org/transport.

LIVABLE COMMUNITIES

For over a decade, n4a has been a leader in the expansion of livable community initiatives across the country. Most recently, the n4a Livable Communities Collaborative (LCC), funded by the MetLife Foundation, elevated the issue of livability for people across the lifespan by providing technical assistance and training to six distinct communities. Remote training opportunities and materials were also made available to others engaged in livable communities planning and projects.

IMPACT

> **Response to the release of n4a's Livable Communities report, "Making Your Community Livable for All Ages: What's Working!" was unprecedented**, with more than 70,000 downloads in the first three weeks of its release. National stories in *The Washington Post* and PBS's *Next Avenue* as well as local coverage in the communities showcased in the report and elsewhere were secured. Touted by experts and practitioners involved in Livable Communities work as the "best report currently available on the subject," its

recommendations have been shared at conferences and other venues.

> **The report was released during an event on Capitol Hill** attended by two of the communities featured in the report, officials from the U.S. Department of Housing and Urban Development and the U.S. Department of Transportation, congressional staff, AAAs and senior policy advocates from several aging coalition organizations.

> In addition to the technical assistance, training and workshop facilitation provided by n4a staff in the six communities, n4a brought representatives from those communities to Georgetown University where they received **training from national experts on livability and community organizing**. In the aftermath of this



intensive, year-long effort, communities have gone on to create programs in areas from mobility management to shifting the culture around aging and older adulthood,

many of which are led by teams of older adult volunteers who were trained through the Volunteer Resource Center.

> [Learn more](http://www.n4a.org/livable) at www.n4a.org/livable.



Speakers at n4a's Livable Communities report release on Capitol Hill (left to right): Stephanie Firestone, Jessica Maurer, Julie Aldrich, Roger Lewis, Cathy Bollinger, Sandy Markwood.

VOLUNTEERISM

The Aging Network Volunteer Resource Center

is working to increase the number of older adult volunteers serving the Network and to enrich the experience of these volunteers to keep them engaged in developing and providing critical services to those in need. Funded by a grant from the Administration for Community Living, the Center offers online resources, staff and volunteer training and opportunities for leaders to exchange best practices, all to help organizations build their capacity as they strive to serve a growing aging population.

IMPACT

> **Modernized the Aging Network's volunteer engagement strategy** (PowerUP!) based on research of boomers and advances in organizational development. Conducted PowerUP! Institutes in California, Kentucky, District of Columbia, Wisconsin and Pennsylvania. Pennsylvania held a statewide training to help spread this innovative model throughout their entire state network.

> Competitively awarded six community agencies **Volunteer Team Incentive Awards**, to acknowledge the impact the teams produced in filling the gap between need or services and funding to meet growing needs. Information about the development of teams and stories were shared widely across the Network.

> **Over the past year** the number of registered volunteer website users climbed to over 1,200, making the Resource Center a go-to place for training and technical assistance for volunteer development. Using curated material from our online library provided an array of web-based and in-person training opportunities for AAAs and Title VI programs as well as Aging Network partners. A how-to manual on the development of teams for Senior Medicare Patrol and SHIP programs is under development.

> [Learn more](http://www.n4a.org/volunteercenter) at www.n4a.org/volunteercenter.



Volunteers taking part in a PowerUP! training in Pennsylvania.

INFORMATION AND PLANNING: UNDERSTANDING THE CAPACITY OF THE AGING NETWORK

With funding from the Administration for Community Living, n4a partners with the Scripps Gerontology Center to build the business capacity of Area Agencies on Aging and Title VI Native American aging programs. The initiative works to strengthen management practices and methodologies, support the leadership and broaden the role of the Aging Network in the delivery of community-based services and supports. The project compiles data from national surveys of AAAs and Title VI programs, holds intensive training sessions focused on business development and strategic planning, facilitates peer and expert technical assistance and web-based trainings.

IMPACT

- > Released “2014 Area Agency on Aging Survey Report: Trends and New Directions” and “Title VI Programs Survey Report.”
- > In partnership with Scripps Gerontology Center, launched topical **survey on IT infrastructure** in the Aging Network.
- > **Provided in-person Business Acumen trainings** for AAAs in Arizona and North Carolina.
- > **Learn more** at www.n4a.org/businesscapacity.

MEDICARE OUTREACH

n4a supports our members’ Medicare outreach and enrollment assistance efforts. In partnership with NCOA’s Center for Benefits Outreach and Enrollment, we provide AAAs with training and resources for their outreach to low-income beneficiaries not yet enrolled in money-saving programs. Additionally, in partnership with United Healthcare, n4a has produced materials to train Aging Network staff and volunteers as they provide one-on-one counseling to older adults selecting a Medicare Part D prescription drug plan.

IMPACT

- > **Conducted a study of Medicare counselors** to help identify information gaps in understanding Medicare and determine which tools are most effective in working with consumers. Hundreds of local programs downloaded the resulting toolkit to help facilitate their training of counselors.
- > **Based on a survey of AAA staff** with responsibility for educating older adults about Medicare and its low-income savings programs, n4a developed recommendations for education and outreach tactics

for other Medicare counselors, and shared this with our network via webinars and other trainings.

- > **Showcased innovative outreach tactics** for informing and assisting hard-to-reach, low-income and rural populations in a webinar that reached more than 130 local Medicare counselors.

> **Learn more** at www.n4a.org/medicareenrollment.



n4a hosts specialized programs that enable our members to grow professionally, learn from peers and experts, and share the most innovative practices happening in the field of aging and community living.

ANNUAL CONFERENCE & TRADESHOW

Over 800 attendees from the Aging Network and partner organizations gathered in Dallas, Texas for n4a's 39th Annual Conference & Tradeshow, July 12-16.

The Conference highlighted innovative practices and emerging trends happening across the Aging Network including: the integration of Medicaid managed care, private pay initiatives, elder justice issues, developing evidence-based programs, care transitions and much more. In addition to daily general sessions, this year's Conference featured 114 workshops, over 70 exhibitors as a part of the Tradeshow, and intensive trainings for new directors, information and referral specialists and senior transportation providers.

The Conference keynote was delivered by Kathy Greenlee, Assistant Secretary for Aging and Administrator of the Administration for Community Living. Additionally, for the second year n4a partnered with United Healthcare, *USA Today* and the National Council on Aging to host the United States of Aging Town Hall. As part of the event, national survey data was

released about the attitudes of older adults with regard to aging. The keynote for the Town Hall event was former first lady Laura Bush.

> [Learn more](http://www.n4aconference.org) at www.n4aconference.org.



n4a CEO Sandy Markwood (right) participates in the United States of Aging Town Hall panel with NCOA President & CEO James Firman and UnitedHealthcare Chief Medical Officer Dr. Rhonda Randall.



Assistant Secretary for Aging Kathy Greenlee addresses n4a Conference attendees in Dallas.

LEADERSHIP INSTITUTE

The n4a Leadership Institute Class of 2015 was the largest in the 8-year history of the program, drawing 42 directors and other staff from AAAs and Title VI programs nationwide. Held on the campus of Georgetown University, the highly customized and

interactive three-day session was led by renowned leadership training expert Doug Krug. Many attendees noted that this is a time of major transition for their agencies as they explore opportunities to broaden their service offerings in the long-term and health care

marketplaces, and that the Institute provides them with the tools to take their leadership skills to the next level. The Institute also serves an important role as an incubator of emerging Aging Network leaders, providing them with professional development resources they might not otherwise be able to access.

As a follow-up to the Leadership Institute, participants will be part of webinars and online affinity groups to support and reinforce the Leadership Institute experience and to build peer network support systems.

The n4a Leadership Institute is generously supported by corporate sponsors Harmony Information Systems and Bateman Senior Meals.

[Learn more](http://www.n4a.org/leadershipinstitute) at www.n4a.org/leadershipinstitute.



Graduates from the 2015 n4a Leadership Institute in Washington, DC

AGING INNOVATIONS & ACHIEVEMENT AWARDS

Every year, n4a proudly recognizes the innovative programs and successful best practices of our members through the *n4a Aging Innovations and Achievement Awards (AIA)* program. The awards highlight leading-edge and successful programs that demonstrate sound management practices that are replicable by others in the Aging Network. They exemplify both traditional and new strategies in a range of categories. *Aging Innovations Awards* honor the most innovative and cutting-edge programs among all nominations received and *Aging Achievement Awards* recognize programs that meet all of the award eligibility criteria as a contemporary, effective and

replicable program. At the 2014 Annual Conference and Tradeshow in Dallas, Texas, 13 Innovations and 32 Achievement awards were presented. The AIA program is generously sponsored by Critical Signal Technologies.

[Learn more](http://www.n4a.org/aia) at www.n4a.org/aia.



2014 n4a Aging Innovations Award Winners from the San Francisco Department of Aging & Adult Services

CONNECTING WITH OUR MEMBERS

In addition to our programs, educational events, online resources, technical assistance and advocacy, n4a staff also support our members with in-person, or sometimes virtual, presentations at local, state and regional events hosted by AAAs. This year, we added value to at least 25 local, statewide and regional AAA-led conferences/meetings by sharing n4a's national perspective and the latest information from our nation's capital.

Our CEO Sandy Markwood was frequently on the road, meeting members where they are, to better help AAAs manage this rapidly changing environment. Other staff offered up policy or programmatic expertise to support our members' conferences, engage in-person and better serve the needs of our members.



n4a CEO Sandy Markwood (left) with members after speaking at an event in Flagstaff, Arizona.



Directors and staff from Region V listen to n4a CEO Sandy Markwood give a policy update in Chicago, IL.



Amy Gotwals, n4a Chief, Public Policy & External Affairs, receives a thank-you gift after delivering the keynote at a AAA special event in Miami, FL



n4a's Tom Endres, Director, Volunteer Resource Center, works with volunteers and staff at a training in Pennsylvania.

Consolidated Statement of Financial Activities

For Twelve Months Ending December 31, 2014

SUPPORT AND REVENUE

Membership Dues	\$ 841,605
Government Grants/In-Kind/Foundation Grant	5,009,238
Conferences/Seminars/Training	863,306
Program Income/Interest/Other Income	123,798
TOTAL SUPPORT AND REVENUE	\$ 6,837,947

EXPENSES

Membership/Fundraising/Overhead (Programs and Overhead)	\$ 966,304
Government Grants/In-Kind/Foundation Grant	4,754,265
Conferences/Seminar/Training	740,146
Communications and Outreach/Public Policy	466,265
TOTAL EXPENSES	\$ 6,926,980
CHANGE IN NET ASSETS¹	\$ (89,033)
NET ASSETS, BEGINNING OF YEAR	\$ 489,774
NET ASSETS, END OF YEAR	\$ 400,741

(1) Reflects the expenditure of a foundation grant in the current year, while the foundation grant revenue was received and recognized during the prior year.

Note: Information taken from the n4a draft audit consolidated Statement of Activities as of December, 31, 2014. Audited by Cocchiaro & Associates.



n4a 2014-2015 Board of Directors

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Uniontown, OH

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Mary Beals-Luedtka

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Sarah Casiano

Executive Assistant

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Mark Fetterhoff

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*Program Director,
Livable Communities*

Tom Endres

*Program Director, Aging Network
Volunteer Resource Center*

National Center on Senior Transportation

Virginia Dize

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Eileen Miller

Senior Program Associate

Yolanda Stewart

*Program Assistant/
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Eldercare Locator

Jacqueline Oliver

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