2020 ANNUAL REPORT
A NOTE FROM OUR CEO

Dear Supporters,

As I sit at my desk reflecting on FY20, I cannot avoid the obvious: Milestones’s story this year – like that of everyone else – is one of The Before, and The After. July through February, in The Before, Milestones busily hummed along: serving meals, conducting our evidence-based classes, providing needed services, working on expanding partnerships, updating our strategic plan, completing the steady flow of state and federal reports, meeting auditing and monitoring requirements, seeking additional funding to expand services, making repairs, upgrading infrastructure, finding efficiencies, rubbing every two nickels together to try to make a quarter, and advocating for older Iowans. Then March arrived – The After – and with it came a new reality that would change everything. It started out as the "novel coronavirus", then it became "COVID-19", then it became simply “COVID”. And our world changed. FAST.

The Milestones senior management team closely monitored the situation, responded with great deliberation, and took actions similar to other agencies: offices closed to the public, meal sites closed, staff who desired -- and were able -- to work remotely were set up. We embraced virtual meetings, daily (and sometimes hourly) monitored the ever-evolving situation, and created and implemented policies and procedures to fit the new reality. Our nutrition program, in particular, had to make the greatest adaptations: over the course of three very intense months, our nutrition staff completely turned the Milestones nutrition operation around with entirely different products and strict protocols, processes, and delivery procedures. They had to “turn the barge on a dime”, and they managed to accomplish that feat. New pilot programs include restaurant partnerships and weekly or bi-weekly frozen meal deliveries into isolated rural areas that we hadn't been able to serve pre-pandemic due to lack of funding. The additional CARES ACT funding was a rare positive aspect of the COVID-19 pandemic for us. This additional funding enabled Milestones to help aging Iowans by providing meals, resources, and services to a much greater degree and went a long way to sufficiently meeting the high level of need across our region.

FY2020 brought challenges such as none of us has previously faced. I commend and appreciate every Milestones staff member and volunteer, for it is their hard work and commitment that positioned our agency to remain strong and resilient -- despite being plunged into unprecedented circumstances -- and not miss a beat in continuing the critical work of serving older Iowans.

Kindest Regards,

Becky J. Passman, CEO, Milestones Area Agency on Aging
NAVIGATING A PANDEMIC

In mid-March, when the reality of the COVID-19 was thrust upon America, Milestones sprang into quick action: offices closed to the public, meal sites closed, set up staff who desired -- and were able -- to work remotely, embrace virtual meetings, constant monitoring of the ever-evolving situation, create and implement policies and procedures to fit the new reality.

NUTRITION

Milestones’s most unique challenge was in our nutrition program. Unlike the other agencies, Milestones prepares the meals for most of our counties (14 of 17). Between mid-March and April, we halted daily hot meal delivery to reduce exposure, coordinated with food suppliers and food banks, and set up shelf stable assembly lines, creating and delivering food boxes across the region. When food suppliers ran short, staff went to the grocery stores and filled our carts with food box items. Shelf-stable food boxes were promoted through radio, TV, ads, and staff calls to consumers, and were delivered to any aging Iowan upon request. Simultaneously, Milestones cooks were realigning to mass produce frozen meals, and we began delivering multiple meals once or twice per week. Since congregate meals sites were closed, home delivery recipients were expanded to include congregate meal participants; we also offered “drive by” meal pickups for those who desired.

EMBRACING TECHNOLOGY

With social-distancing recommendations immediately took effect, Milestones looked for ways to stay connected with their clients, while eliminating office and in-person visits. Through phone calls and more advanced digital tools such as Zoom and TeamMeet, Milestones staff was able to stay in touch with their clients and each other, and continue to provide to services to those who needed it the most. Programs such as Fresh Conversations and Caregiver Support Groups were adapted to online models to continue to reach those in need of these programs. When social isolation arose as a common concern among older Iowans, these programs were able to provide a positive social outlet to those who were unable to leave their homes.
# Revenue & Expenditures (FY 2020)

## Revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>$2,541,710</td>
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<tr>
<td>State</td>
<td>$1,588,137</td>
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<tr>
<td>Managed Care Organizations</td>
<td>$602,056</td>
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<tr>
<td>Participant Contributions</td>
<td>$440,726</td>
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<tr>
<td>CARES Act / FFCRA</td>
<td>$368,093</td>
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<tr>
<td>Local Support / Private Contributions</td>
<td>$98,408</td>
</tr>
<tr>
<td><strong>Total Revenue:</strong></td>
<td><strong>$5,639,132</strong></td>
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## Program Expenditures

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nutrition</td>
<td>$3,866,647</td>
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<tr>
<td>Family Caregiver</td>
<td>$321,225</td>
</tr>
<tr>
<td>Elder Abuse Prevention &amp; Advocacy</td>
<td>$128,084</td>
</tr>
<tr>
<td>LifeLong Links Services *</td>
<td>$418,554</td>
</tr>
<tr>
<td>Health &amp; Wellness Education **</td>
<td>$59,928</td>
</tr>
<tr>
<td>Home &amp; Community Based Services ***</td>
<td>$297,237</td>
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<tr>
<td>Administration</td>
<td>$329,728</td>
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<tr>
<td>Other</td>
<td>$215,918</td>
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<tr>
<td><strong>Total Expenditures:</strong></td>
<td><strong>$5,636,321</strong></td>
</tr>
</tbody>
</table>

* Includes Information & Assistance, Case Management and Options Counselling
** Includes evidence-based and non-evidence-based health promotion and nutrition education
*** Includes homemaker\ services, adult daycare, legal, material aid and transportation services
COMMUNITY CARE SERVICES (FY 2020)

FAMILY CAREGIVER PROGRAM
The Milestones Family Caregiver Program served 748 caregivers and by providing support to caregivers through Information & Assistance, Options Counselling, In and Out of Home Respite Care, and Support Groups.

ELDER ABUSE PREVENTION AND AWARENESS (EAPA)
The EAPA program provided support to 91 Iowans during FY2020. Reported abuse included physical, financial, emotional, sexual and neglect.

HOME AND COMMUNITY BASED SERVICES
Milestones provided home services and material to 807 older Iowans.

<table>
<thead>
<tr>
<th>Service</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td>326</td>
</tr>
<tr>
<td>Material Aid</td>
<td>378</td>
</tr>
<tr>
<td>Homemaker Services</td>
<td>91</td>
</tr>
<tr>
<td>Adult Day Care</td>
<td>12</td>
</tr>
</tbody>
</table>

EVIDENCE-BASED PROGRAMMING
Together with our network of community partners, Milestones conducted the following nationally recognized programs: A Matter of Balance, Tai Chi for Arthritis/Falls Prevention, and Better Choices, Better Health (Chronic Disease Self-Management Program). More than 124 aging Iowans participated in 1,719 hours of programming to improve their health status and reduce falls risks.

INFORMATION & ASSISTANCE
The Lifelong Links Team provided a wide variety information & resources in assisting 2982 older Iowans.
SENIOR NUTRITION PROGRAM
Milestones worked to overcome senior hunger for low-income and vulnerable seniors age 60 and up by serving over 361,000 meals in to 4,623 Older Iowans during FY2020.

CONGREGATE MEAL SITES
Prior to the COVID-19 pandemic, Milestones prepared and served over 101,000 Meals at congregate mealsites throughout their 17 counties.

HOME-DELIVERED MEALS
While home-delivered meals were a valuable service throughout the year, they become essential once the pandemic arrived. In total over 259,000 meals were prepared and delivered, serving 2,736 older Iowans.

NUTRITION EDUCATION & COUNSELING
Proper nutrition is a significant factor in disease control and avoiding injury in older adults. 1,836 Aging Iowans were provided with nutrition counseling, health promotion and education during the fiscal year.

SENIORS’ FARMERS MARKET PROGRAM
In cooperation with the Department of Agriculture and Land Stewardship and the Department of Elder Affairs, Milestones AAA distributed Farmers Market Vouchers to 2,934 seniors in the 17 county service area during the 2020 calendar year providng a total of $29,340 in nutrition assistance.

FRESH CONVERSATIONS
Fresh Conversations is a free discussion group for adults age 60 years & older held at various meal sites and later online. Discussions are focused on improving nutrition, wellness, and independence. During FY2020, 390 older Iowans participated.
BOARD & SUPPORTERS

BOARD OF DIRECTORS
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Julie Schilling | Des Moines County
Sheri M. Wilson | Des Moines County
Bill Thom | Appanoose County
Richard Roller | Scott County

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Jim Howell
Sheri M. Wilson
Bill Thom
Richard M. Roller
Peggy Fisher
Stephen Swisher
Bob Waugh

Thank you to the following groups and individuals for whom Milestones is extremely grateful.

GRANT PROVIDERS
Clinton County Development Association
Greater Muscatine Community Foundation
Regional Development Authority
Scott County Regional Authority
Ottumwa Regional Legacy Foundation
Grace Bott Millar Foundation
Community Foundation of VanBuren County
Wayne County/South Central Iowa Community Foundation
North Scott Rotary Education Foundation
Delta Dental of Iowa Foundation
United Way of Wapello County
Quad Cities Community Foundation
Community Foundation of Des Moines County
Lee County Board of Supervisors
QC Plus 60 Friendship Club
Dorothy & Bud Lundahl Charitable Trust

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Kimberly Rumbough
Bennett Honson
Holly Barksdale
Cheryl Miller
Floyd R. Thomas
Ft. Madison Kiwanis Club
Ft. Madison Rotary Club
Pat Wilkins
South Central IA Community Foundation
Two Rivers Bank & Trust

And many others that contributed time, money, services and facilities to help keep the Milestones mission moving forward.