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Annual Report



Contact Us
855.410.6222



Website
MilestonesAAA.org

Serving 17 Counties
in Southeastern Iowa



A NOTE FROM OUR CEO



Dear Supporters,

In 1973, Area Agencies on Aging were formally established as part of the Older Americans Act reauthorization. They were created to be local organizations, designated as AAAs by the State and operating with state oversight. Originally under the umbrella of Bi-State Regional Commission and named “Great River Bend Area Agency on Aging”, the organization moved across the river and became a freestanding agency to coordinate services in Scott, Clinton, and Muscatine counties. The agency later changed its name to “Generations”. After several years, the State of Iowa moved to consolidate the 16 agencies serving Iowa’s 99 counties to 6 agencies with a larger planning and service area (PSA). As a result, Milestones AAA came into being in 2013, with a PSA of 17 counties.

I share all of this to underscore the long and rich history of this agency. For over 50 years, in one form or another, Milestones has served aging Iowans and provided a broad array of critical services, as evidenced in this report.

The need is great. With pandemic-related additional funding received from 2020 – 2023, the agency was able to meet needs as never before since funding was sufficient to the need encountered. As of 2024, that funding was expended. The need remained, however, and as evidenced by our deficit, we struggled to reduce services and related expenditures as quickly as necessary. We are working to regain a healthy balance from this time period.

Your support is critical -- whether it be participant contributions for service received, private donations to help fund services for those in need, a letter to your legislator to support much needed funding, or through volunteerism (meal delivery, office help, Advisory Council or Board service, etc.), your support can make the difference between whether or not someone receives a meal or has the supports necessary to remain safely at home. Thank you for caring and for being a Milestones supporter.

Kindest Regards,

Becky J. Passman

Becky J, Passman, CEO

SFY 2024 BOARD OF DIRECTORS

Julie Schilling – Des Moines County, Chair
Richard Roller - Scott County, Vice Chair
Stephen Swisher, Scott County, Secretary/Treasurer
Peggy Fisher – Jefferson County
Bill Thom - Appanoose County
Sheri Wilson – Des Moines County
Terry Wilson – Scott County

SFY 2024 FOUNDATION BOARD

Linda Rubey, Chair
Peggy Dykes, Vice Chair
Liz Sherwin
Stephen Swisher
Terry Wilson

SFY 2024 ADVISORY COUNCIL

Terry Wilson - Scott County, Board Representative
Frank Illiff - Muscatine County
Susan Leuthauser – Scott County
Liz Sherwin – Scott County
Patricia Steiner – Des Moines County

FINANCIAL REVIEW

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REVENUE

Federal	\$3,088,505
State of Iowa	\$1,502,894
Managed Care Organizations	\$267,544
Participant Contributions	\$379,432
In-Kind	\$927,814
Private & Community Support	\$30,875
Total Revenue	\$6,197,064

PROGRAM EXPENDITURES

Nutrition	\$3,565,938
Family Caregiver	\$352,642
Elder Abuse Prevention & Advocacy	\$192,723
LifeLong Links Services*	\$543,643
Health & Wellness Education**	\$148,663
Home & Community-Based Services***	\$1,002,077
Administration	\$518,796
Total Expenditures	\$6,324,482

STATEMENT OF FINANCIAL POSITION: JUNE 30, 2024

Assets

Cash & Equivalents	\$141,697
Receivables	\$294,057
Inventory	\$15,878
Allowance for Uncollectable	\$0
Prepaid Expenses	\$34,761
Property and Equipment	\$614,573
Accumulated Depreciation	(\$383,679)
Right-of-Use-Assets Operating	\$58,785

Total Assets

\$775,772

Liabilities

Accounts Payable	\$280,445
Accrued Payroll & Payroll Taxes	\$85,590
Accrued Benefits	\$101,182
Deferred Revenue	\$118,505

Total Liabilities

\$835,689

Unrestricted Net Assets

\$268,371

Total Liabilities & Net Assets

\$1,161,170

*Includes Information & Assistance, Case Management & Options Counseling

**Includes evidence based & non-evidence-based health promotion and nutrition education

***Includes homemaker services, chore, personal care, adult daycare, legal aid, material aid & transportation

SUPPORT SERVICES

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ELDER ABUSE PREVENTION AND AWARENESS (EAPA)

In SFY2024, the EAPA program **served 165 lowans**. The reported abuse types included physical, financial, emotional, sexual, and neglect. Additionally, the program remained committed to community education and awareness surrounding these crucial issues.

FAMILY CAREGIVER PROGRAM

The Family Caregiver Program **served 465 caregivers** through a range of essential services, including: Information & Assistance, Options Counseling, In and Out of Home Respite Care, and Support Groups. Milestones also hosted the annual Quad Cities Caregiver Conference, which serves as a cornerstone for networking and education in the caregiver community.

HOME AND COMMUNITY BASED SERVICES

Milestones extended home services and material assistance to a **total of 852 consumers**. These services encompassed a variety of essential supports, including Adult Day Care, Transportation, Homemaker Services, Personal Care, and Emergency Response Systems.

IOWA RETURN TO COMMUNITY PROGRAM

The IRTC program continues to grow, and has played a pivotal role in aiding individuals in transitioning back home after hospital or nursing home stays, through collaboration with patients and their families.



EVIDENCE-BASED PROGRAMMING

Milestones evidence-based programs offer proven strategies for disease management, falls prevention, and overall health improvement among older adults. With offerings like Tai Chi for Arthritis, A Matter of Balance, and Stepping On, Milestones **assisted 880 lowans** with wellness programming, underscoring our commitment to enhancing quality of life for older adults and reducing overall healthcare costs.

INFORMATION AND ASSISTANCE

At the heart of Milestones' mission is Information & Assistance. Our Regional Resource Navigators offer primary support to older lowans, addressing inquiries, making referrals to Milestones programs, and guiding to community resources. Information & Assistance **served 2,084 individuals**.

NUTRITION SERVICES

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HOME-DELIVERED MEALS

The Milestones Home-Delivered Meals Program helps provide food security to older lowans by delivering meals to those in greatest economic and social need, who are homebound by reason of illness or incapacitating disability, and/or those who are otherwise isolated. Through paid and volunteer drivers, **196,734 meals were delivered to 1,337 consumers.**

CONGREGATE MEAL SITES

Milestones operates congregate meal sites throughout our seventeen-county area, and in SFY2024 we **served 87,230 meals to 1,404 consumers.** These meals provide not only vital nutrition, but also the opportunity for seniors to enjoy companionship and a sense of community, fostering social connections that are essential for well-being.

NUTRITION EDUCATION AND COUNSELING

Proper nutrition is a significant factor in managing health conditions and preventable injury in older adults. **1,849 older lowans were provided nutrition education** during the fiscal year. Programs, such as nutrition counseling, served as a starting point for healthier lifestyles.



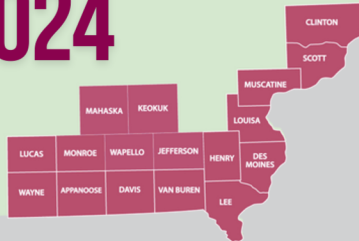
SENIOR FARMERS MARKET PROGRAM

In cooperation with the Department of Agriculture and Land Stewardship and the Department of Elder Affairs, Milestones AAA distributed Farmers Market Vouchers to **3,230** older lowans in the 17-county service area, providing a total of **\$161,500 in nutrition assistance.**

SFY2024 CONSUMER SERVICES TOTALS

	<i>CONSUMERS SERVED</i>	<i>UNITS DELIVERED</i>
Caregiver Services	465	2,871
Elder Abuse Prevention & Awareness	165	402
Health Promotion & Disease Prevention	880	4,613
Information & Assistance	2,084	3,171
Nutrition Education	1,849	18,502
Options Counseling / Case Management	288	1,108
Transportation	470	21,238
HCBS: Chore/Homemaker/Personal Care	321	11,215
Personal Emergency Response System	61	479

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MISSION STATEMENT

Milestones is dedicated to being the premier organization for assisting older Iowans, adults with disabilities, and their family caregivers to identify and access the services and resources needed to remain independent and self-sufficient.

Davenport Office

(Administration)

New address as of June 2025

4440 Brady Street

Davenport, Iowa 52806

Ph: 563.324.9085

Fax: 563.324.9384

Burlington Office

509 Jefferson Street

Burlington, Iowa 52601

Ph: 319.752.5433

Fax: 319.754.7030

Ottumwa Office

New address as of May 2025

635 E. Pennsylvania Ave.

Ottumwa, Iowa 52501

Ph: 641.682.2270

Fax: 641.682.2445

Milestones Area Agency on Aging

4440 Brady Street

Davenport, IA 52806

