Through litigation, administrative advocacy, and advocate trainings, we magnify the impact of our legal expertise to protect the rights of millions of older adults across the country. We especially focus on breaking down barriers for underrepresented groups who face the largest disparities in health and wealth.

With 10,000 Americans turning 65 every day, rising healthcare costs, and few pensions, more and more older adults are having difficulty making ends meet as they age. Our fight for justice is more important than ever.
Modest monthly Supplemental Security Income (SSI) and Social Security Disability Income (SSDI) benefits keep many older adults and people with disabilities in our communities from experiencing hunger and homelessness. When systemic discrimination or unfair practices lead to loss of benefits, we step in to correct the problem so that our grandmothers, grandfathers, aunts, uncles, parents, and neighbors can age with justice.

In September, 2016 we reached a settlement agreement with SSA on behalf of more than 4,000 Californians, many of whom will now have the opportunity to have their disability status redetermined. An individual class member could receive as much as $200,000 in retroactive SSDI benefits, depending on their earnings record and the time period covered by their claim.

Hugh Held was slapped with thousands of dollars in overpayment charges that he could not afford out of his small, monthly SSI benefit. All because the SSA refused to recognize his marriage to his same-sex spouse for more than a year after the June 2013 Supreme Court decision that required it. Justice in Aging, together with GLBTQ Advocates & Defenders (GLAD) and the Boston law firm Foley Hoag filed a class action seeking waiver of all these inequitable overpayments.

In September, 2016 we reached a settlement agreement with SSA on behalf of more than 4,000 Californians, many of whom will now have the opportunity to have their disability status redetermined. An individual class member could receive as much as $200,000 in retroactive SSDI benefits, depending on their earnings record and the time period covered by their claim.

As a result of our lawsuit and a letter of support signed by over 100 Members of Congress, SSA issued instructions to stop assessing and collecting overpayments resulting from the agency’s failure to recognize valid marriages between two people of the same sex.

Learn More: justiceinaging.org/our-work/litigation
We Connect Older Adults to What They Need Most

We provide trainings and create materials that help thousands of legal aid attorneys and other direct service advocates help their clients access the health care and economic security benefits they need to age with justice.

Through the trainings, we hear directly from advocates about systemic problems and work to fix them through advocacy or litigation.

WHAT OUR ADVOCATES SAY ABOUT OUR TRAININGS AND ADVOCACY IN 2016

I have been working in legal aid for 18 months and continue to learn something new every day and your webinar today continued that trend.
– Webinar Attendee, SSI Basics.

It is shocking that it takes a class action to deal with something like this. I’m not always proud to be a lawyer, but Justice in Aging makes me proud and warms my heart.
– Dick Sayre, Sayre Sayre & Fossum in reference to Hart case settlement

The Ombudsman program has been most impressed and grateful for the information you provide. Thank you for your interest and excellent work to support our friends and neighbors as they age.
– Jerry Sorensen, Montana State Long-Term Ombudsman

I sincerely appreciate and depend on your expertise in the countless issues that Justice in Aging researches on behalf of the senior population.
– Randi Bardeaux, Member, PASC Los Angeles Governing Board

In 2016 we launched a multi-faceted project to stop this type of billing. We created a toolkit that advocates and individual consumers can use to assert their rights with providers, we released a survey of state-specific laws against improper billing, and we’ve been working with state and federal authorities and health plans to improve the way individuals on both Medicaid and Medicare are identified on their health care cards and in computer systems.

When an older adult on Medicaid with a low fixed income receives an unexpected bill for a health care service that should be covered by Medicaid, it can throw their lives into turmoil, causing them to forgo meals or medications, skip needed health care, or burden family members unnecessarily. Unfortunately, doctors and hospitals often do bill these individuals, and most often they are people who have both Medicare and Medicaid. This type of billing is illegal under federal law.

Toolkit for Advocates

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IMPACT

Advocates report success using our toolkit, and our work has prompted systemic changes at the agency level. The Centers for Medicare and Medicaid Services (CMS) is now investigating the problem, taking steps to educate providers that improper billing is illegal, and establishing enforcement mechanisms.

2016

14,000 advocates trained

47 states
Our Special Focus on California

1. Increase economic security and access to services
   - California has the highest rate of senior poverty in the nation and is home to more than half a million older adults living at or below the poverty line. Older adults in California face some of the highest housing costs in the nation and senior homelessness is a growing crisis. California also has a large population of low-income seniors eligible for both Medicare and Medicaid (dual eligibles), making it a critical location for our work to increase access to affordable, quality healthcare.

2. Prevent homelessness statewide
   - In 2016 we launched a number of new projects in California.
   - The SSI program can be an economic lifeline for low-income older adults as it provides a very basic income to pay for shelter, food, and other necessities. However, the program is historically under-enrolled. With senior homelessness on the rise statewide, we've launched a special project to increase access to and utilization of SSI benefits among older adults in California, with a special emphasis on using SSI to prevent homelessness among this population.

3. Improve oral health for older adults
   - Dental health is an important part of overall health for older adults. Poor dental health can lead to difficulty eating, pain, life-threatening infections, social isolation, and can even worsen chronic conditions like diabetes and hypertension. Yet, California ranks 30th among states in dental care for older adults. We are educating advocates and service providers about how they can help older adults visit dentists and strongly advocate for state and national policy changes to ensure that oral health doesn’t remain an afterthought or an extra for older adults on Medicare and Medicaid.

In 2016 we launched a number of new projects in California.

San Francisco Bay Area seniors are struggling more than other parts of the country with astronomical housing costs and homelessness. We are working with community partners in Alameda and Contra Costa Counties to help more seniors qualify for and receive Supplemental Security Income (SSI) benefits that can help make seniors more economically secure. We are building and taking the lead on training a network of local advocates to work on improving the program. We are also working to build a network of community disability and poverty advocates to increase access to In Home Supportive Services (IHSS) in these counties through the state’s Medicaid program.

Highest Rate of Senior Poverty

California has the highest rate of senior poverty in the nation and is home to more than half a million older adults living at or below the poverty line. Older adults in California face some of the highest housing costs in the nation and senior homelessness is a growing crisis. California also has a large population of low-income seniors eligible for both Medicare and Medicaid (dual eligibles), making it a critical location for our work to increase access to affordable, quality healthcare.

2016
- 3 new attorneys
- 950 new advocates
We Provide Leadership on Intersectional Issues that Impact Poor Older Adults

DIGNITY FORUM: NOVEMBER 2016

This event, held in Washington, DC just after the presidential election featured a variety of speakers including scholars, attorneys, advocates, and policy makers coming together to understand the scope, scale, and causes of senior poverty in America and forging a path forward.

LEARN MORE justiceinaging.org/events

SPECIAL REPORTS

In 2016, with funding from the Borchard Foundation, we worked with partners to create and release a series of Special Reports and videos to highlight intersectional topics that impact low-income older adults.

LEGAL NEEDS OF LGBT OLDER ADULTS

We're pleased to announce a new project of Justice in Aging called the National Center on Law and Elder Rights (NCLER).

As a centralized, one-stop shop for legal resources, NCLER will provide a high level of expertise and assistance to legal, aging, disability, and elder rights networks across the country. Justice in Aging will administer NCLER through a contract with the Administration for Community Living’s Administration on Aging.

Meet NCLER
More Trainings and Technical Assistance for Legal Services Attorneys Across the Nation

justiceinaging.org/events

justiceinaging.org/specialreports

HOMELESSNESS AND OLDER ADULTS

FAMILY CAREGIVING AND OLDER ADULTS

LEGAL NEEDS OF LGBT OLDER ADULTS

NATIONAL CENTER ON LAW & ELDER RIGHTS
Take a Stand Against Senior Poverty: April 7, 2016 San Francisco, CA

A Night of Celebration and Partnership

We awarded Tony Thurmond, CA Assemblymember from District 15, with an Impact Award for his leadership on anti-poverty measures impacting low-income seniors in California. Anne Hinton, Former Executive Director of the San Francisco Department of Aging & Adult Services received the Paul Nathanson Distinguished Advocate Award for her long time advocacy on behalf of older adults in San Francisco.

$100,000 and Above
California HealthCare Foundation
May and Stanley Smith
Charitable Trust
Oak Foundation
The Administration on Aging
The Atlantic Philanthropies
The State Bar of California Legal Services Trust Fund Program
Thomas J. Long Foundation

$50,000 - $99,999
Albert and Elaine Borchard Foundation
The Retirement Research Foundation
The Westgate Foundation

$25,000 - $49,999
Richard and Emily Alexander*
Arnold & Porter LLP*

$5,000 - $9,999
Stephen Bruce
Georgia Burke and David Lu
East Bay Community Foundation
David Fry*
Health Net, Inc.*
Health Plan of San Mateo*
Independence Foundation
Michael Kelly
Molina Healthcare*

$1,000 - $2,499
Bob Adler
Association of Community Affiliated Plans*
Nathan and Christine Barulich
Derek Jacobsen and Zachary Barulich
Aaron and Jennifer Barulich

California Association of Health Plans*
California Community Foundation
Louis H. Carpenter
Howard Cayne
Lesley Ann Clement
William and Iris Edlund
Russell Hirschborn
Emery Howard*
Institute on Aging*
Theodore Kroeber
Hannah Lieberman
Denise Likar
Rebecca Morgan
Morrison & Foerster, LLP*
National Community Pharmacists Association
Tricia Neuman
On Lok*
William Pennington
Rehabilitation Services of Northern California*
Maria Sefrian
Edward and Carole Spargue
The Hawthorne Group, L.C.
Thomas Vartanian

Jean Accius
Aging and Disabilities Charities of America
Blake A. Biles
Alexander E. Bennett and Brooksley Born
California Association of Public Authorities for IHSS (CAPA)*
Eric Carlson and Gracinda Martinez
John Clarke
A.Patrick Doyle and Elizabeth Downes
Episcopal Senior Communities
Jeffrey and Renee Epstein
Linda Enhow-Levenberg
Carroll Estes*
Lois Feinblatt
Steven and Patricia Goldberg
Marcia Green
Phyllis Holmen
LeadingAge California*
Ruth Leys

LifeLong Medical Care*
Ashley McCreary
Gerald McNulty
Shireen McSpadden
Mark Merley
Paul Nathanson
Partners in Care Foundation*
Edith Pennington and Larry Lardy
Webster Phillips
Christopher and Jennifer Prindiville
Kevin Prindiville and Allison Pennington

$250-$499
Maya Altman
America’s Charities
Robert Blanclato
Deborah Callard
CA Senior Leaders Alliance
Jennifer and Kyle Cooney
Mitchell F. Dolin
Nancy DuBois
Essex Meadows Inc.
David Freeman
Anne, Nathan and Rachel Fretz
Jennifer Goldberg
Judith Hautala
Lisa Hayes
Wyrhe W. Holt
Emily Kaufmann
Kathryn Kierzman
Jason D. Kogan
Isobal Konechy
Mollie Lambert
Bryan Lindberg
Robert MacLaughlin
John Massaro
Grant Nyhammer
Edward Ortiz
Greg and Linda Parini
Susan and John Powell

$100 - $249
Donna Yee
Molly Wood
Karen Kaplowitz
Sara Rippentrop
James Robertson
Michael Solow
Craig Stewart
Casey Young
Stuart and Carol Zimring*

Special thanks to Louis Kravitz and Norman Schwartz for generous ongoing support through in-kind donation of photography.

* asterisks indicate Take a Stand event sponsorship
Justice in Aging received a Charity Navigator 4 star rating. Learn More at: charitynavigator.org

2016 Financials - July 1, 2015 - June 30, 2016

Full audited financial statements for fiscal year 2016 with comparisons to 2015 are available on Justice in Aging’s website at justiceinaging.org. The difference between the formal income and expenses for fiscal year 2016 results from the use of grant funds that were received in previous years, but were designated by the funders for expenditure in 2016.

### FY2016 REVENUES by Category

- **Private Foundation Grants & Contracts**: $3,754,542 (79%)
- **Contributions**: $243,491 (9%)
- **Other Program Income**: $3,451,556 (7%)
- **Government Grants & Contracts**: $1,869,358 (5%)

### FY2016 EXPENSES by Category

- **Health & Economic Security Programs**: $2,434,915 (72%)
- **Litigation**: $332,498 (9%)
- **Development**: $507,251 (9%)
- **Management & General Expenses**: $393,440 (10%)