



# MOUNTAIN AGING PARTNERS

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Executive Director

M  
A  
P

# **From Thriving to Survival to Sustainability:**

## **Building a Thriving Future for Adult Day Services**



An aerial photograph of a large university campus. The main building is a long, multi-story structure with a grid of windows, colored in shades of orange and blue. To its right is another large building with a similar grid pattern. The campus is surrounded by lush green trees and a well-maintained lawn. In the background, a city skyline is visible under a clear sky.

**WE WERE PART  
OF THIS.**



**AND WE WERE  
THRIVING.**



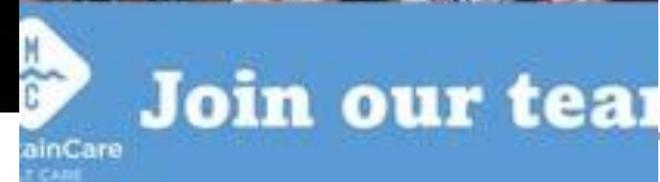


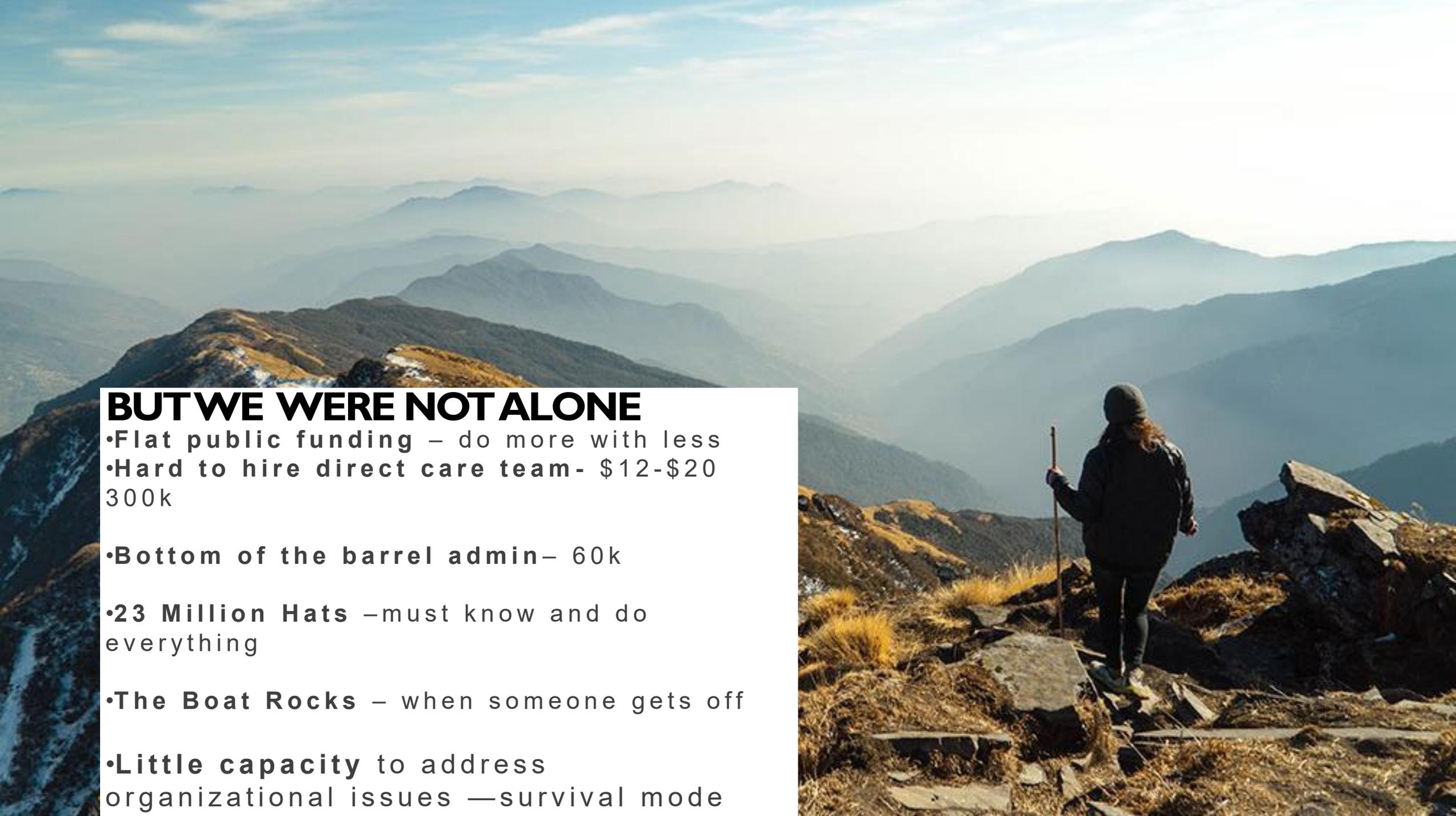
Bought out in 2019 for profit by a for-profit system.

**BOUGHT OUT IN  
2019 BY A FOR  
PROFIT  
HEALTHCARE  
SYSTEM.**

# ONETHINGAFTERANOTHER

- Biggest is that we were at more than a million-dollar deficit per year.
  - 35,000 a month in rent – 2 centers
  - They stopped providing food to the 3 adult day programs (3 counties)
  - Received a letter to vacate the center in one county
  - COVID
  - Trying to find a new program space
  - Had to close a center in one county – because of that negative million-dollar deficit
  - Hiring struggles!

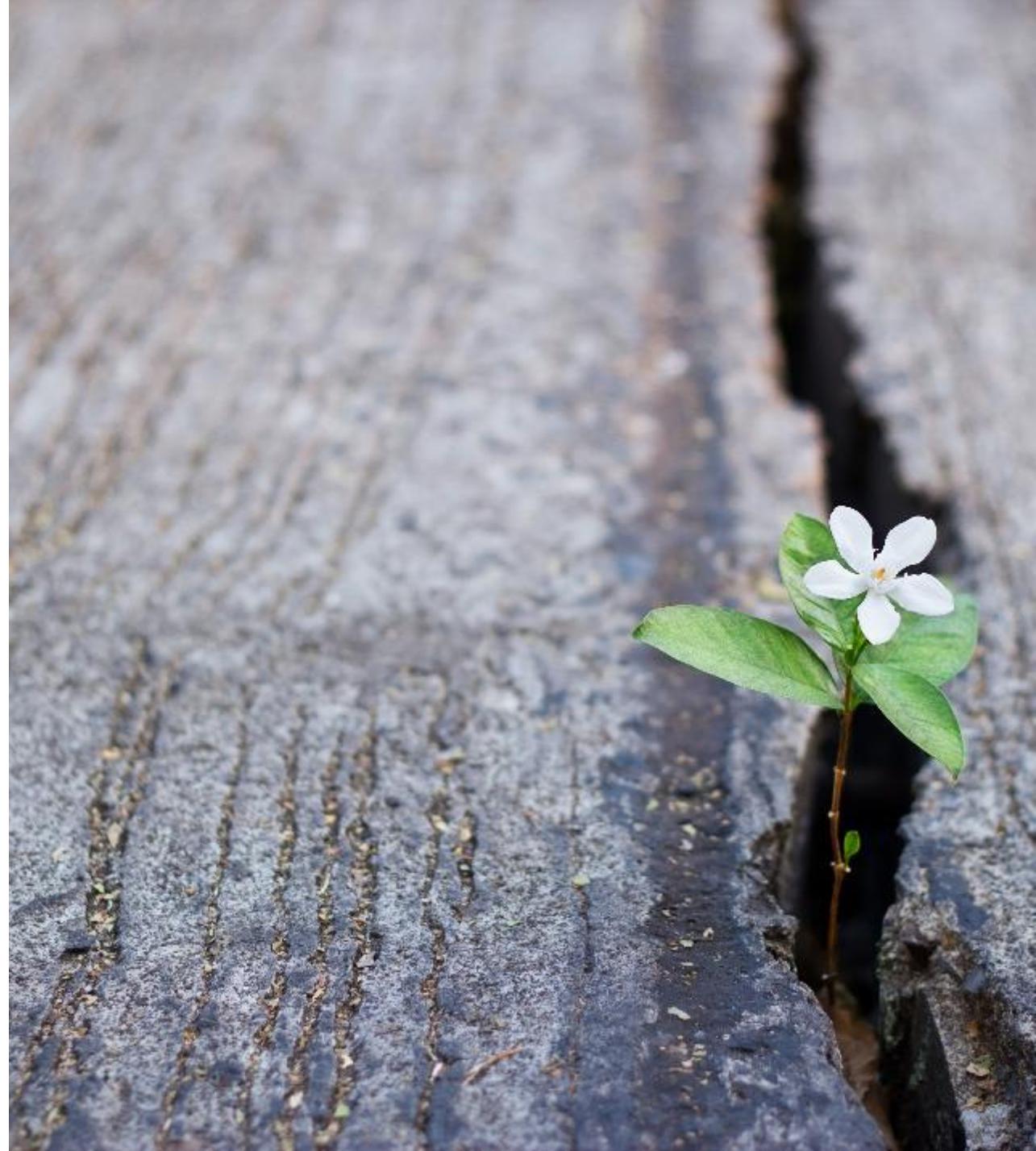


A hiker in a dark jacket and hat stands on a rocky mountain trail, looking out over a vast, hazy mountain range under a blue sky with light clouds. The hiker is holding a walking stick. The foreground shows rocky terrain with some dry grass. The background consists of numerous layers of mountain peaks, creating a sense of depth and scale.

## **BUT WE WERE NOT ALONE**

- Flat public funding – do more with less
- Hard to hire direct care team- \$12-\$20 300k
- Bottom of the barrel admin– 60k
- 23 Million Hats – must know and do everything
- The Boat Rocks – when someone gets off
- Little capacity to address organizational issues — survival mode

**WE HAVE ALL  
THESE GOALS,  
BUT WE ARE  
STUGGLING IN  
OUR SMALL SILOS.**



# WE NEED TO START WITH BUILDING A BETTER AGENCY



# AGING ALLIANCE

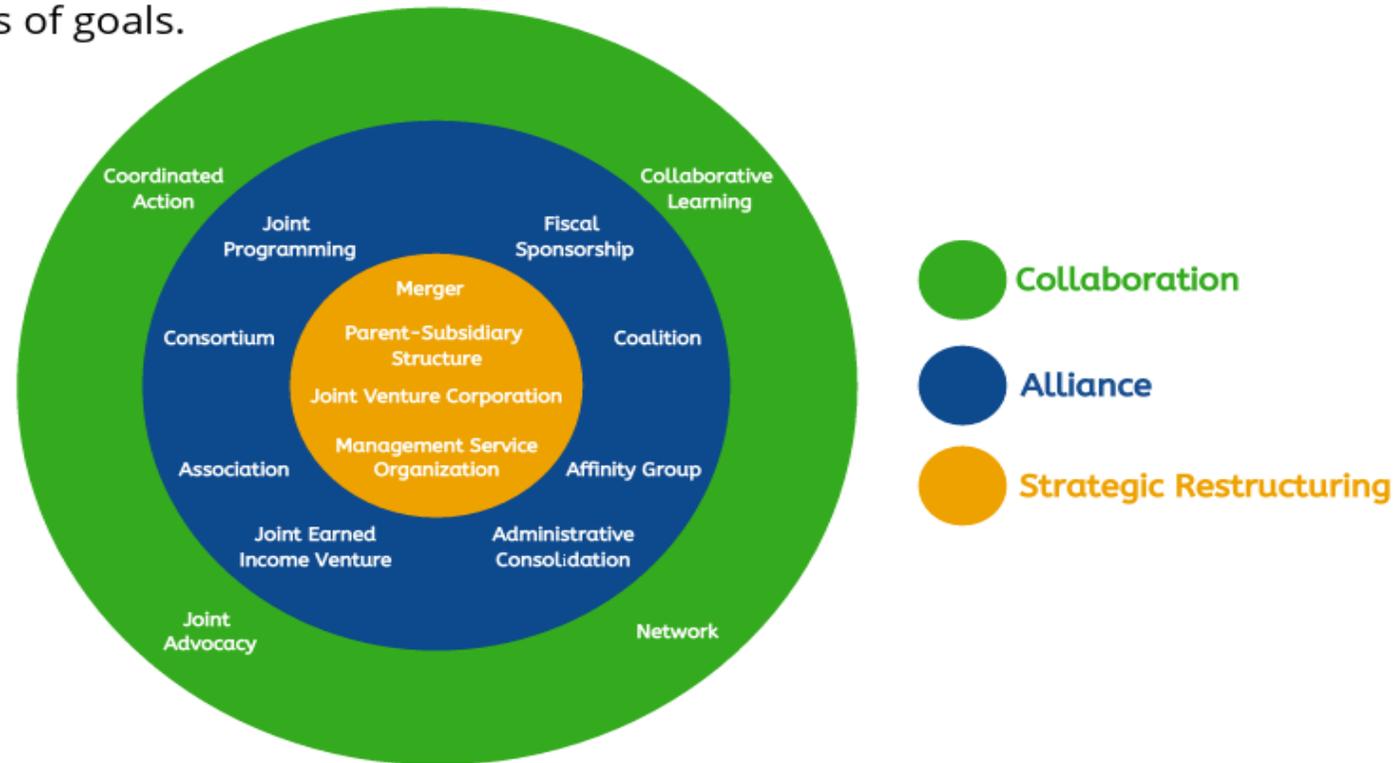
5 agencies – 5 EDs – 5 Board Chairs

- All providing services to older adults
- All getting OAA funding
- 2 Counties
- No duplicated core services
- We weren't duplicating *services*, but we were duplicating *infrastructure*. And it was exhausting.



# STRATEGIC RELATIONSHIPS

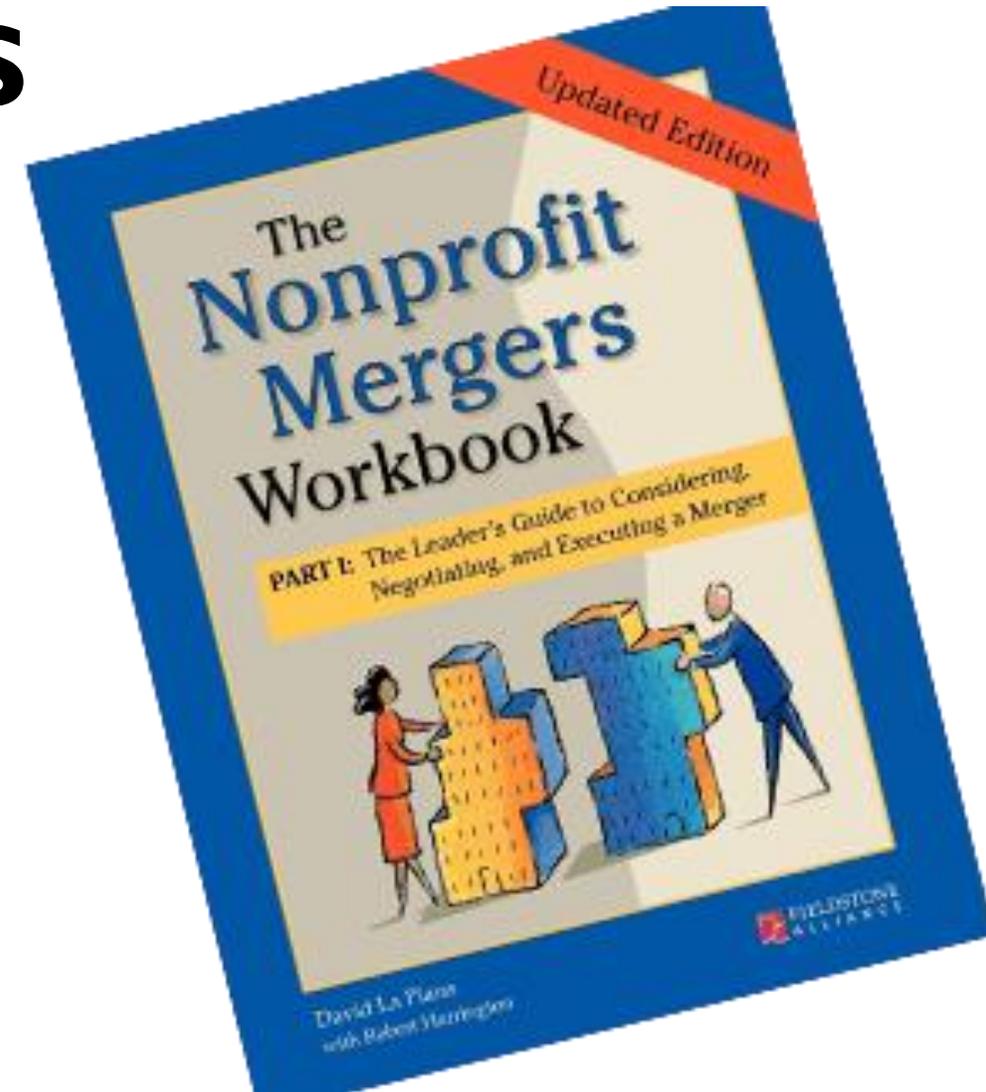
Nonprofit collaboration takes many forms—it's not just about merger! At La Piana Consulting, we have mapped more than a dozen different ways organizations can come together to advance a shared goal. When deciding which to pursue, it is useful to think about certain kinds of partnerships as lending themselves to certain types of goals.



# OUR NEEDS ALIGNED WITH COMMON REASONS FOR MERGERS

## Why Nonprofits pursue M&A

- **Increase Impact:** Scale services and broaden community reach. Meet the needs of the community not have the funding determine the need.
- **Improve Efficiency:** Enhance operational capacity and streamline processes.
- **Strengthen Financial Position:** Gain better access to funding and diversify revenue streams.
- **Acquire (keep) Talent:** Gain skilled staff and leadership essential for growth.
- **Respond to Challenges:** Overcome sustainability issues, funding cuts, and changing operational environments.



# JULY 1, 2025

## Council on Aging for Henderson County

- Founded in **1969** with a mission to support older adults as they age in place.

- Offers services:

- **Meals on Wheels**
- **Community Dining**
- **Information & Options Counseling**
- **Caregiver Support**

- Serves as a **lifeline for over 2,000 older adults** each year across Henderson County.



## MountainCare - Adult Day



MountainCare

- Formed in **1986** – provide high quality community based care for older adults and their families.

- Operates **Adult Day programs** for individuals with cognitive and physical impairments.

- including nursing support, medication management, and therapeutic activities.
- Caregiver support

- Serves **Buncombe County and Henderson County**



# DEERFIELD FOUNDATION SUPPORT

\$250,000 – GAME CHANGING

- Covered Salaries
- Contracted Services:
  - Legal Services - Charity Allies
  - Branding Services – Dena Rutter Designs
  - Accounting Services – DMJPS
- Website and Marketing



# 8 MONTHS OF THINGS TO DO

	Staff Team Meetings	DONE	
	<b>January</b>	22-Jan	26-Feb
NC/BOD	Finalize Vision and Mission Statements	DONE	
NC/BOD	Select Board Members and Officers	DONE	
NC/BOD	Confirm Headquarters and Tax ID	DONE	
NC/BOD	Announce Intent to Merge	DONE	
NC/BOD	Plan a social event for members of the new board	DONE	
NC/BOD	Provide training to all members re: their role a ambassador for the organization		
NC/BOD	Draft a statement of board commitment for all members to sign	DONE	
NC/BOD	Develop a board handbook	DONE	
NC/BOD	Develop an orientation program for incoming members		
NC/BOD	Establish a committee structure and job descriptions for the new board	DONE	
NC/BOD	Survey board members re: interests and strengths	DONE	
NC/BOD	Finalize board committee assignments	DONE	
NC/BOD	Establish a schedule for future board meetings	DONE	
NC/BOD	Establish a schedule for committee meetings	DONE	
NC/BOD	Naming convention completed - shared and staff roll out		
ED	Create a funding plan to meet merger support needs	DONE	
ED	Identify management positions needed in the merged organization	DONE	
ED	Identify necessary skills and competencies for each management position	DONE	
ED	Match current (pre-merger) employees to positions where appropriate	DONE	
ED	Develop Unified Organizational Structure	DONE	
ED	<b>Communication:</b> Announce merger progress during weekly leadership meet	DONE	
ED	Hire Legal Counsel for Merger Agreement	DONE	
ED	FM Hire Accounting Support for Financial Integration		
ED	Develop Draft Merger Agreement		→→→→→→→→
ED	Documents to Legal and Financial services	DONE	

ED		Hire Branding/Marketing Support	DONE				
ED		Announce the Merger to Staff and Stakeholders	→→→→	→→→→	→→→→	→→→→	
ED		Articulate the integration-related duties and responsibilities of the leader team	→→→→	→→→→	→→→→	→→→→	
ED		Contract for year end audit to close out pre-merger fiscal years - MTNCARE	DONE				
ED		MtnCare 6 month budget - MtnCare BOD approved	DONE				
ED	FM	Select an accounting system	DONE				
ED	FM/HR	Adopt a unified time-tracking systems	DONE				
ED	FM	Adopt a unified format for financial statements	DONE				
ED	FM	Adopt a unified chart of accounts	DONE				
ED	FM	Review/analyze donor management systems	→→→→	→→→→	→→→→	→→→→	
ED	FM	Create integrated gift acknowledgement and recognition processes	→→→→	→→→→	→→→→	→→→→	
ED	FM	Work on Bank resolutions for new boards/staff	DONE				
ED	FM	RFPs for investment services					(Cof)
ED	FM	review/analyze pre-merger technology for fundraising management	→→→→	→→→→			
ED	HR	<b>HR Policy Unification:</b> Inventory existing policies and draft unified policie	→→→→	→→→→	→→→→	→→→→	
ED	HR	PTO					
ED	HR	Attendance					
ED	HR	Timekeeping					
ED	HR	Benefits eligibility					

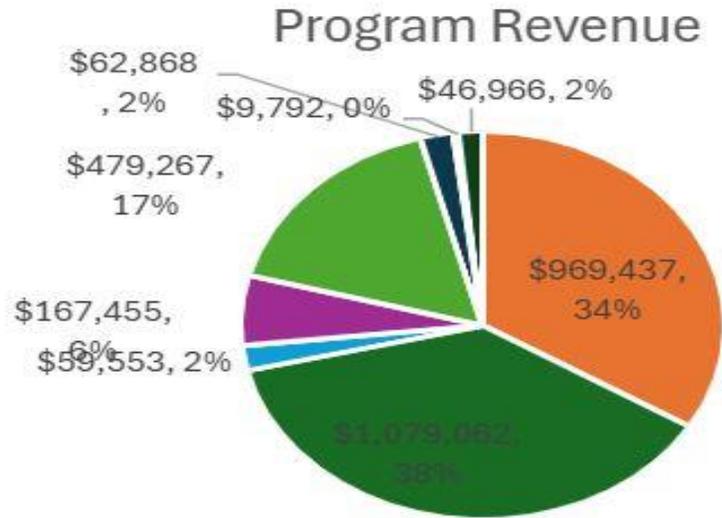


A NEW  
AGENCY



# MOUNTAIN AGING PARTNERS

MAP



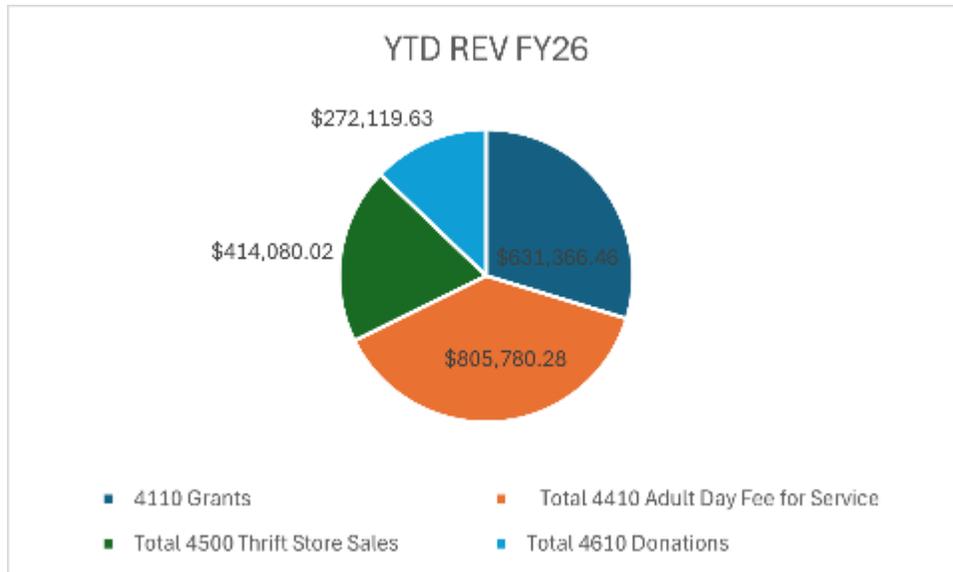
# PROGRAM FUNDING

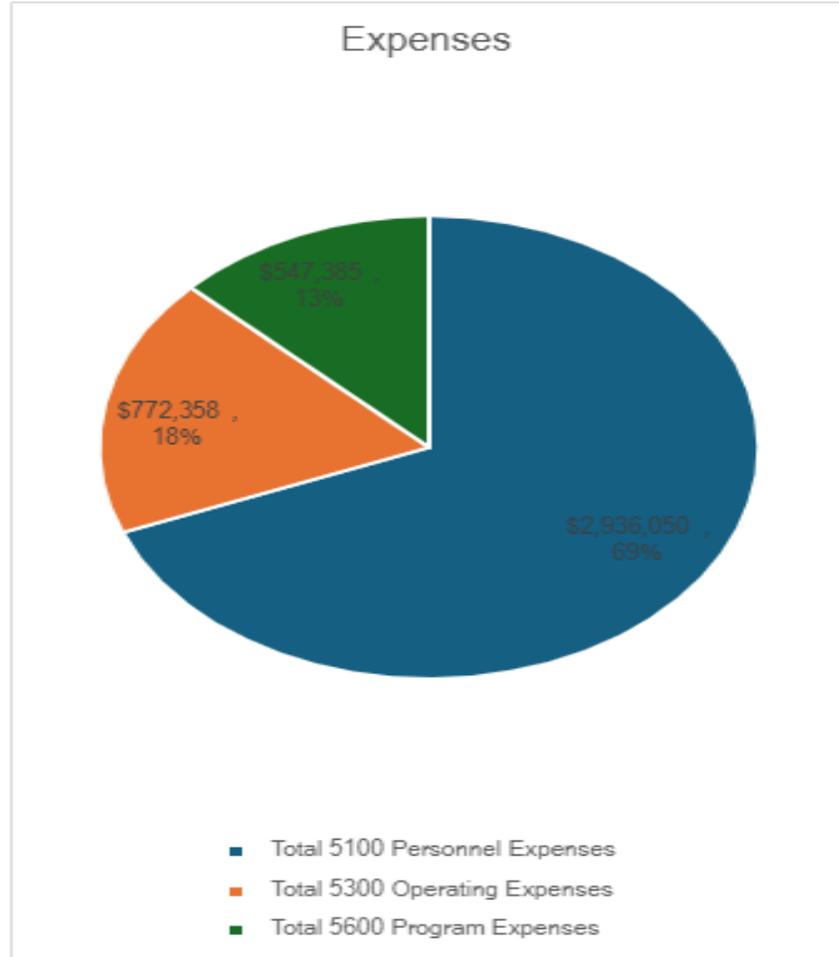
34% OAA – HCCBG

38% Private pay – Adult day

17% VA – Adult day

Does not include grants, donations, or thrift stores revenue.





# EXPENSES

69% Personnel

18% Operating

13% Program

# MOUNTAIN AGING PARTNERS

- **This is a proactive, strategic merger —**  
We've been working closely for years; this makes it official.
- **No changes to services or access.**  
The same teams, same programs, and same mission will continue, uninterrupted.
- **We are here to strengthen collaboration with partners.**  
We want to work closely to expand impact, referrals, and shared solutions.



# Stronger Financial Stability

- Shared resources = lower costs
  - 350k in admin
  - 60k Expenses – IT, Audits, duplication apps.
  - 400k positive bottom line 7 months
- **More diverse business model**
- More resilient in the face of economic or funding shifts
- **And more dollars go to meals, care, and support**—not overhead.

*We're not growing funding, so we have to grow smarter.*



# INTEGRATED SERVICES – BETTER ACCESS

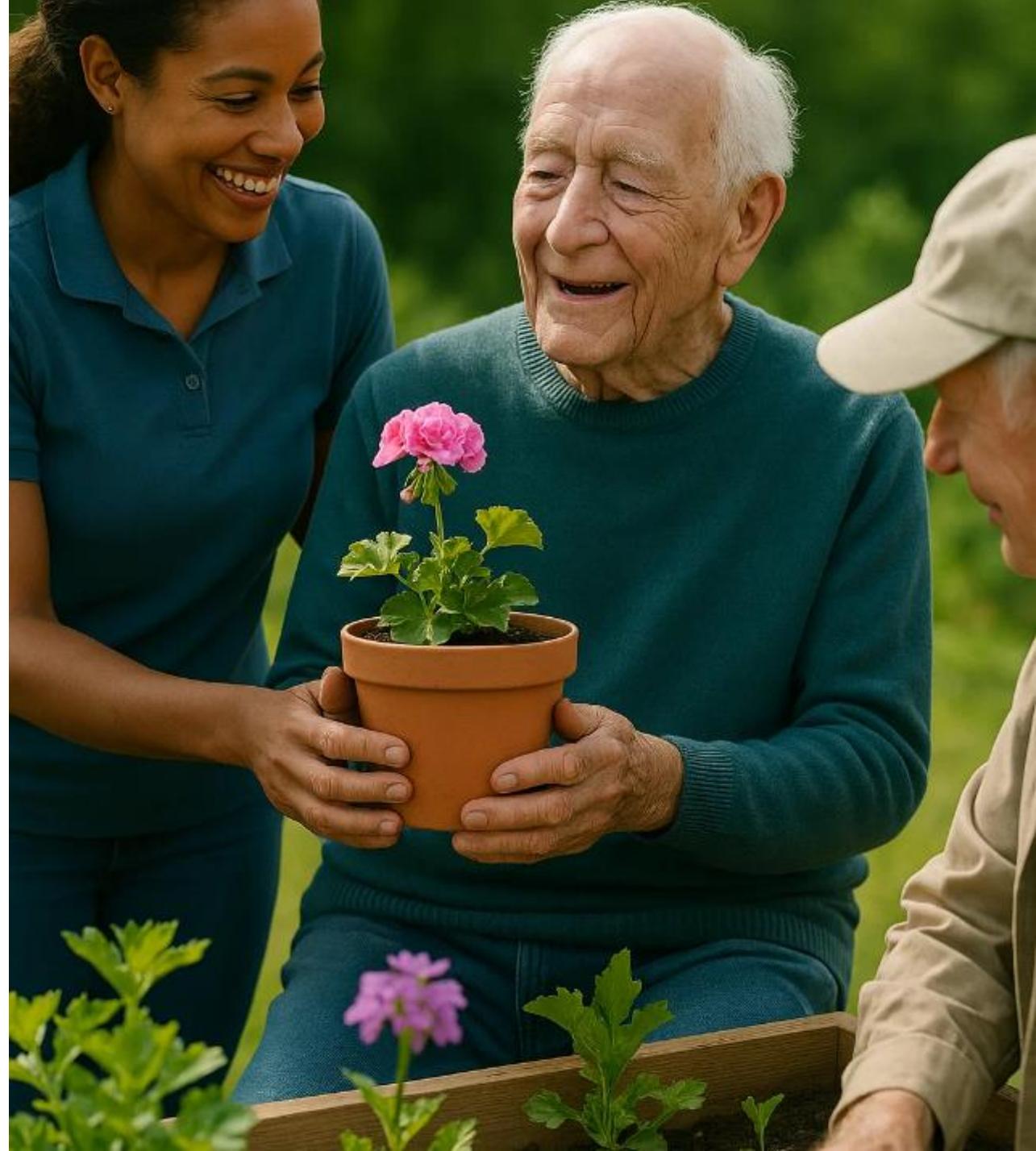
## Integrated Services

- Meals on Wheels, Adult Day, Dining, Caregiver Support, Information and Help line- Social Workers (assessment)— now under one agency



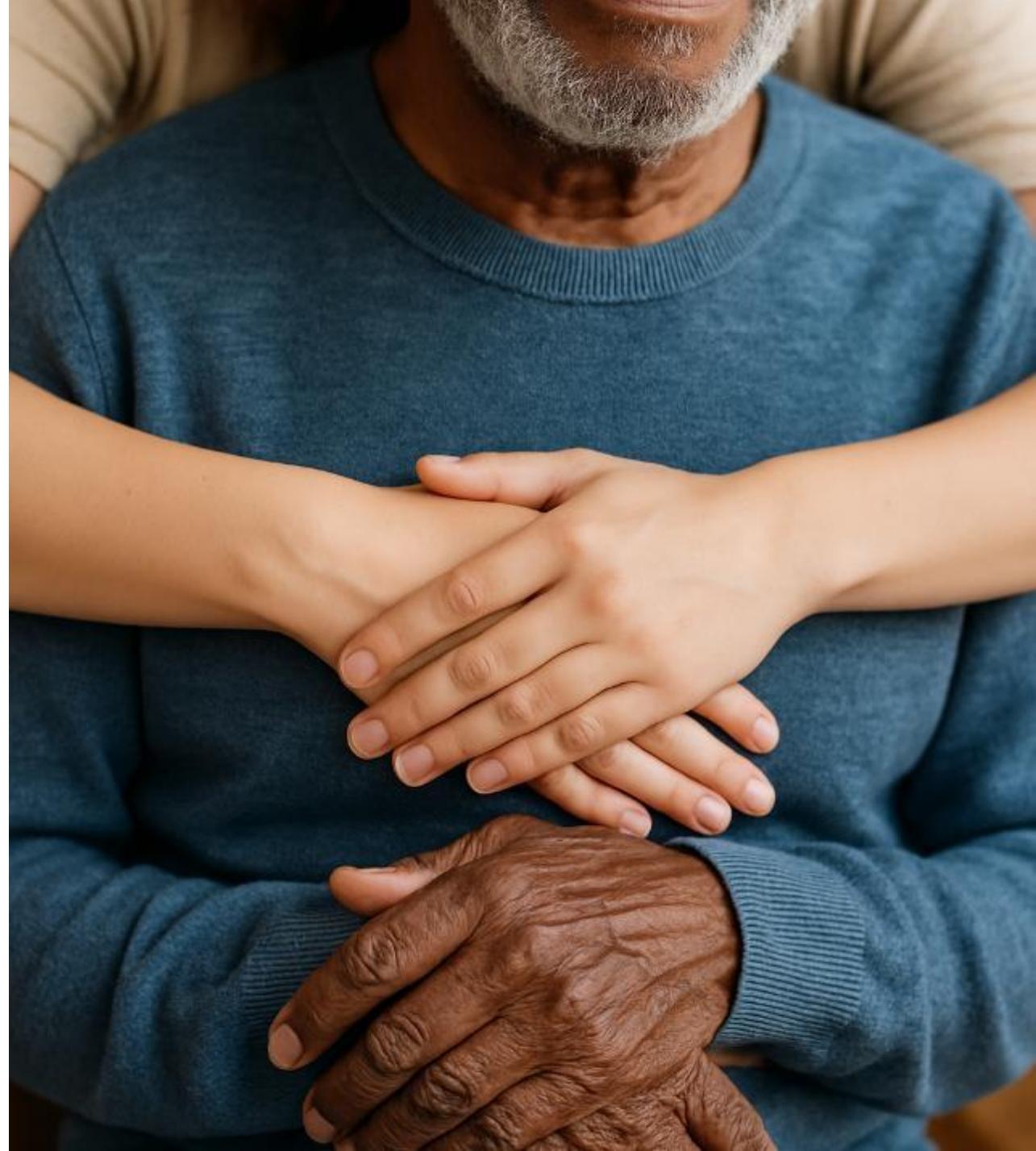
# CAPACITY FOR GROWTH & INNOVATION

- Be more proactive and nimbler  
—on community needs and gaps
- Create new programs if needed
- HCAC – County Aging Plan
- *For us growth isn't about scale—  
it's responsiveness*



# OPERATIONAL EFFICIENCY

- Less duplication of back-office functions and costs
- Shared space, shared staff = more \$ to direct services
- Streamlined systems improve consistency
- Crossed trained staff - HCCBG



# **MOST IMPORTANTLY... MISSION-DRIVEN**

- Through all of this, we never lost sight of our mission:

Helping older adults age with dignity, connection, and support.

- That's what drives every decision. And merging allowed us to protect that mission—not dilute it.



# SUSTAINABILITY MATTERS IN AGING SERVICES

**Sustainability** doesn't just mean keeping the lights on. It's about **ensuring that vital services for older adults and caregivers remain - accessible, effective, and resilient** over time, especially in the **face of funding shifts, workforce shortages, and rising demand.**





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Thank you!



MAP