

MAURA T. HEALEY
Governor

KIMBERLEY DRISCOLL
Lieutenant Governor

KATHLEEN E. WALSH
Secretary, Executive Office
of Health & Human Services

ROBIN LIPSON
Secretary, Executive Office of
Aging & Independence

TO: Massachusetts Councils on Aging Directors
FROM: Adam Frank, COA Program Coordinator
DATE: June 22, 2026
RE: FY27 Annual Report Categories

Below please find the activity and service categories to be collected for the FY27 annual report, which covers the time period between July 1, 2026 and June 30, 2027. This is being provided to you now so that you may begin tracking this information when the new fiscal year begins on July 1.

All the categories are the same as FY26 with the following exceptions:

- Case Management and Outreach will be combined into one category called "Outreach/Case Management."
- A new category called "Advocacy" will be added, and should include office hours with local, county and state officials.
- A new category called "Caregiver Support" will be added.
- A new category called "Memory Cafés" will be added.
- Ambulatory and Non-Ambulatory Transportation will be combined into a single category called "Transportation."

These changes are based on suggestions we have received from COA Directors and MCOA leadership.

Please note that the umbrella categories in all capital letters (Outreach & Advocacy, Professional Services, etc.) are solely for AGE's purposes in organizing the data. You do not need to assign activities to these umbrella categories unless it is helpful to you.

OUTREACH & ADVOCACY

- Referrals
- *Outreach/Case Management (New—Outreach and Case Management to be combined for FY27)*
- Health Benefits Counseling / SHINE
- Other Benefits Counseling
- *Advocacy (New for FY27 report. Will include office hours with local, county and state officials)*

PROFESSIONAL SERVICES

- Legal Assistance
- Financial Management
- Tax Assistance
- Mental Health

SUPPORT SERVICES

- *Caregiver Support (New for FY27 Annual Report)*
- *Memory Café (New for FY27 Annual Report)*
- Food Shopping Assistance
- Group Support

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- Social / Supportive Day Care
- Friendly Visiting
- Wellness Check
- Durable Medical Equipment Loan
- Digital Literacy
- Employment Services
- Intergenerational Programming
- *Transportation (NEW—Ambulatory and Non-Ambulatory Transportation to be combined in FY27 report)*
- Day Trips
- Home Repair

WELLNESS

- Health Education
- Health Screening
- Other Health Services
- Fitness / Exercise
- Congregate Meals
- Grab & Go Meals
- Home Delivered Meals

COMMUNITY

- Lifelong Learning
- Recreation & Socialization
- Cultural Events

People Less Than Age 60:

- Referrals
- Transportation (Units: # Rides)
- Family Assistance

If you have any questions, please don't hesitate to reach out to me at adam.frank@mass.gov. Thank you!