



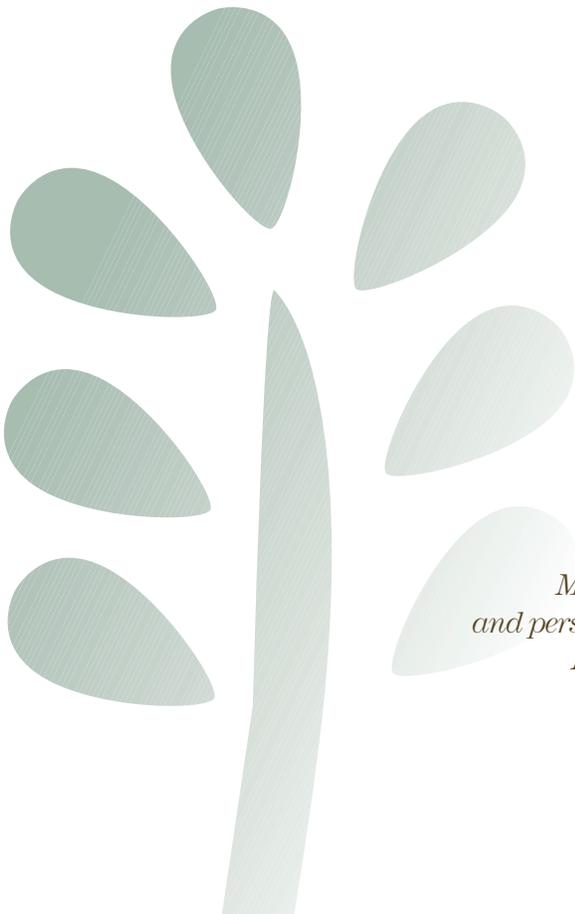
2017 ELDERSOURCE
IMPACT REPORT



Listening.
Understanding.
Taking Action.



*Making a difference in the lives of seniors, caregivers
and persons with disabilities living in Baker, Clay, Duval, Flagler,
Nassau, St. Johns and Volusia Counties since 1974.*





A Message from the Executive Director

Dear friends, families and community leaders:

Ever feel overwhelmed by all the information out there or feel lost because you don't know where to find the right information? I often feel that way and I believe that many of our seniors feel this way too, which is why it is extremely important that as we fulfill our mission as the Area Agency on Aging and the Aging & Disability Resource Center, we dedicate ourselves to **listening** to our clients; **understanding** their needs and then **taking action** in order to make a difference in their lives.

Traditional annual reports divulge an avalanche of information about the year in review. Instead, the 2017 ElderSource Impact Report shares specific facets of the impact we've made in key areas; how we have responded to the needs of our aging population; stories of those we have helped; demonstrates our fiscal accountability and offers you the opportunity to support the work we do.

It is one thing to say, "I hear you." This is passive and noncommittal. Listening, on the other hand, is a conscious choice, requiring attention and concentration. At ElderSource, we are listening; we do understand; and we are taking action to support seniors and caregivers in our communities.

Sincerely,
Linda J. Levin, M.S.G.
Executive Director



ElderSource Mission To empower individuals to age with independence and dignity by providing leadership, direction, advocacy and support for comprehensive, coordinated continuum of care.

Vision To be recognized and respected in the community as the source for information, advocacy, leadership, planning and services related to aging.

Inclusion Statement ElderSource values all people – including but not limited to all nationalities, socio-economic backgrounds, abilities, races, genders, religious perspectives, sexual orientations and gender identities – in everything we do. We welcome the unique insights and perspectives of all persons in our quest to fulfill our mission.

Dear Friends of ElderSource:

Reflecting on 2017 many things come to mind relating to the work being accomplished by the ElderSource Board, staff and volunteers — the ever-changing dynamics of our aging community and what lies ahead to keep up the momentum for making a meaningful impact on the lives of seniors, persons with disabilities and their families in our area.

I am continuously impressed by the compassion and dedication of the board members, staff and volunteers. At every board meeting “Mission Moments” are shared. These are touching stories, sometimes difficult to hear, of how people have come to ElderSource for help. Like Ms. C, 74 years-old who moved here from Georgia. She experienced a bureaucratic nightmare trying to close out her Georgia SNAP benefits and re-apply for benefits in Florida. The ElderSource SNAP volunteer navigated her through the process with a successful outcome of receiving more benefits in Florida than she did in Georgia. Then there was 77 year-old Mr. R, a recent widower caring for his disabled adult son. Their home was infested with bed bugs and rodents. He did not have the money to pay for pest treatment. Through the Senior to Senior Program and assistance from staff, Mr. R and his son are now living in a pest-free home.

In looking ahead, the challenges for meeting the needs of our aging population will only magnify and multiply. Did you know that there are 10,000 people turning 65 every day? As stewards of the ElderSource mission, we will support and seek solutions to meet the growing needs. We hope you will join with us.

How can you support us? Sign up for the monthly e-newsletter to stay apprised of agency news and industry changes (info@myeldersource.org). Help us advocate for the needs of seniors. Become a volunteer for the SHINE program. Make a donation to support our Senior to Senior Program where your contribution will make a difference in the life of a senior, a program that fills the gap for services not funded by state and federal dollars. (myeldersource.org/give-now/)

Thank you for listening, for understanding and for helping us take action through your actions.

Stu Gaines
Board Chair

A Message from the Board Chair



ElderSource Guiding Principals

We value

- Those we serve
- Excellent and responsive service
- Honesty, integrity and professional behavior
- Results and accountability
- Proactive, innovative and visionary efforts
- Community collaboration
- The knowledge, loyalty, commitment and unselfish team spirit of staff, volunteers and providers
- Our role as the leader in the aging network

Listening.



As the Area Agency on Aging and the Aging and Disability Resource Center for seven counties in Northeast Florida, we are charged with identifying the needs of older adults and caregivers, developing plans to address those needs, contracting with local service providers to provide the needed services and providing the stewardship of the taxpayer and donor dollars. We take this work very seriously as we make sure those in greatest need are getting quality services and your donor and taxpayer dollars are well and appropriately spent.

Another core business is to be the information and referral agency that leads people to resources they need so they can live their lives with self-sufficiency and self-respect. People are encouraged to call ElderSource and "Start Here for Help."

Answering the Call

The dedicated staff of the Aging and Disability Resource Center (ADRC) are on the receiving end of many calls from seniors, adults with disabilities and caregivers searching for support, guidance and resources. Individuals contact us for a myriad of reasons: those needing help in understanding their Medicare plans, seniors facing a financial crisis seeking assistance, information on transportation, house or food resources.

The ADRC HelpLine staff answered over **31,534 calls** in 2017. In 2017, over **9,000** seniors and persons with disabilities were **screened for services**

The top reasons for calls coming into the ElderSource HelpLine were those needing **ASSISTANCE** to secure **transportation, housing and food**

FROM January through November 2017 **17,310** people called for **INFORMATION** and **resources**



Most people connect with ElderSource by calling our HelpLine at 1-888-242-4464

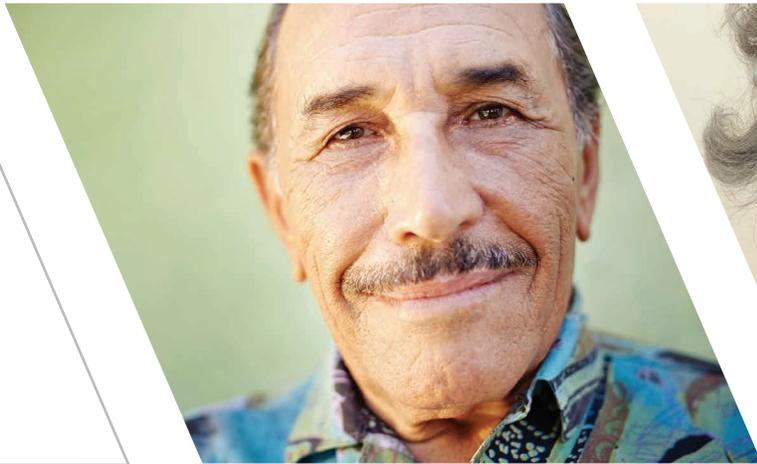
Our Customer Service Specialists listen carefully to each caller, asking follow-up questions to make sure we identify their needs and address their concerns. They provide resources and reassurance to seniors and their relatives near and far. We connect seniors, persons with disabilities, and their families to the most appropriate resources available such as:



ElderSource does provide some direct services to our clients. However many services that clients receive are coordinated through contracts we have with qualified agencies and professionals. These Provider Agencies work with ElderSource to ensure you get the help you need when you need it most:

Aging True, Baker County Council on Aging, Clay County Council on Aging, Flagler County Senior Services, Nassau County Council on Aging, St. Johns County Council on Aging, Council on Aging of Volusia County, City of Jacksonville, Jacksonville Area Legal Aid, Community Legal Services of Mid-Florida, County of Volusia Human Services Department and Area Health Education Center

Understanding.



The landscape of communities is changing. It has been reported repeatedly that 10,000 people are turning 65 every day in the United States. How will cities and neighborhoods need to adapt to this aging population? What do we know and what can we do to manage this shift in demographics? ElderSource is required by the State Department of Elder Affairs to keep apprised of the needs and changes in our service area. Each year, ElderSource researches and updates its Area Plan, a comprehensive document detailing the demographics of where seniors are living, needing resources and what other gaps need to be filled to support the aging population.

ElderSource has been able to map data and resources to help us and our provider agencies better reach those most in need. This was also helpful in working with various emergency management organizations after Hurricane Irma and for our work with the Coalition to Stop Senior Hunger.

Many People in Our Community Need Our Help

515,200 seniors (60+) are living in our **7-county service area**, nearly **24%** of the population

9,717 seniors are over the **AGE OF 80**

71,040 live below **125%** of the poverty level

2,125 people in our **seven county area** are on the wait list to receive **home delivered meals**

more than **123,171** seniors are living alone

160,063 seniors have at least one type of disability, such as **hearing or vision loss** or are just **too frail** to adequately care for themselves

4,667 people in our service area are on the wait list to secure **Medicaid managed long-term care help**

*Source: Florida Department of Elder Affairs – 2016 Profile of Older Americans.

When Compassion & Support Meet *Client Success Stories*



A Financial Crisis

"I was frantic. I never had my lights cut off before," said Ms. P. Unfortunately Ms. P, 68 years-old, was facing a financial crisis and did not know where to turn. She was accustomed to living independently, and truly thought the problem with her utility bill was something she could fix on her own. She was hesitant to reach out to her sons for help because she had been taught to always be strong and to have a plan. When she realized the problem was beyond her control, Ms. P finally reached out for help. A friend suggested she attend a JEA Senior Day, a community resource event coordinated by JEA, United Way and ElderSource. It was a Customer Service Specialist with ElderSource who coordinated the requests for assistance that are funded by the Senior to Senior Fund. Not only was ElderSource able to help Ms. P with her JEA bill, but she also received help with fixing a broken toilet and a leaking faucet.

The Senior to Senior Fund is an endowment created by the Delores Barr Weaver Fund coordinated through the Community Foundation of Northeast Florida designed to assist senior citizens in Duval, Nassau, Baker, Clay and St. Johns Counties facing short-term financial crises. The program is intended to resolve the present crisis, as well as the underlying causes ensuring the person does not become dependent on the assistance and can maintain living independently. The endowment has been a tremendous boost of support. However, the requests for emergency assistance continue to grow and no other funding is available to support these people in grim situations. In honor of what would have been Jim Moran's 99th birthday, ElderSource recently received a special two-year grant from The Jim Moran Foundation totaling \$290,000 to help more people in Duval County through the Senior to Senior Fund.



Making Tough Choices

Ms. P understands having to live on a fixed-income and was often forced to make tough decisions. "If you aren't cutting back on medications, usually food is the next thing to go," said Ms. P. She expressed the importance of older people being able to eat healthy and how SNAP — Supplemental Nutrition Assistance Program — can help make this happen. Ms. P recently reapplied for SNAP, recognizing she could benefit from the program and supplement her grocery bill. "It was like manna from heaven," she said of receiving her official SNAP benefits. It brought joy to her to be able to purchase fresh fruits and vegetables. For Ms. P it's not about the dollar amount she received from SNAP, but the idea of knowing it's there to help supplement what she already has.

ElderSource was recently awarded a grant to support a National Council on Aging (NCOA) nationwide effort to help older adults struggling to buy groceries.



A Bit of Calm After the Storm

During Hurricane Irma, Ms. M, a widow caring for her adult disabled daughter, experienced damage to both her fence and porch roof. The fence was torn away, while the porch roof started leaking. She also lost all her food due to an electricity outage. Tapping into Disaster Recovery Funds, her fence was fixed and peace of mind was restored. Also, Ms. M. was also referred to The Small Business Administration (SBA) where she received a loan which was able to cover the roof repairs, along with food cards able to cover grocery needs for her and her daughter. Ms. M is very thankful for our help in restoring her yard and fence.

With \$295,000 from multiple funding sources — First Coast Relief Fund, Centene, AARP and the Weinberg Foundation through the Florida Association of Area Agencies on Aging — seniors given assistance to replenish lost food and household items, remove trees and make home repairs.



Volunteers to the Rescue

Ms. M knows first-hand how our SHINE —Serving Health Insurance Needs of Elders — program helps seniors get the proper health care information they need to make the best possible decisions.

Ms. M was glad to work with SHINE volunteer Mace, who was able to listen and guide her through an on-going issue with coverage of her prescription medication. She felt his compassion and was grateful he could think outside the box. "He truly went above and beyond," she said. "I just wanted to say thank you for the help that one of your SHINE volunteers provided me. He was so very courteous, professional and knowledgeable," she added.

SHINE is a program of the Department of Elder Affairs and is operated in this area through ElderSource. SHINE offers seniors, adults with disabilities and their caregiver's free, unbiased counseling on Medicare and health insurance issues.

Taking Action.



Our agency's guiding principles — providing excellent customer service with an attitude of honesty and integrity and utilizing a myriad of partnerships to ensure great results — motivates us to take action so seniors can live independently and with dignity. Agency accomplishments have taken place in a myriad of areas.

Mission Driven Work

Empowering individuals to live independently and with dignity is at the core of our work. Working with our provider agencies, many seniors and adults with disabilities received assistance such as:

490,889 home delivered meals were distributed

10,072 hours of homemaking service were provided

2,018 hours of personal care services were administered

531 seniors were provided financial assistance from federal or local grants to resolve housing, utility, transportation and other crisis situations, enabling them to remain living independently

SHINE

Serving Health Insurance Needs of Elders, is a program administered by ElderSource through the Department of Elder Affairs. Understanding the complex system of Medicare is a daunting task for many seniors and caregivers. People just turning 65 do not often know where to start the process of activating their Medicare. Others have challenges understanding their benefits and determining if their current plan is the best one for them. The SHINE program offers free and unbiased counseling to those needing further guidance and support.



In 2017

- 45 individuals were trained to serve as SHINE volunteers, providing year-round free and unbiased counseling.
- SHINE volunteers made 14,214 contacts to individuals seeking free, unbiased counseling through the SHINE program. (Note: volunteers often had more than one counseling session, which indicates the high number of contacts.)
- Because of SHINE, it has been reported that, in total, seniors in our area saved over \$5 million on Medicare Part D and \$2.6 million from the Medicare Savings Plan (MSP).
- Federal lawmakers are currently threatening to eliminate the funding for all State Health Insurance Assistance Programs, known as SHINE in Florida. Aggressive advocacy at the federal level will be necessary next year to keep this valuable program available to seniors.

Reaching Out

Community outreach events such as health fairs, food distribution events and speaking engagements are our “grassroots” efforts of getting people the help they need — talking to them face-to-face. Over the past year, ElderSource participated in a record number of events including health fairs, community festivals, company health fairs, presentations at churches, retirement communities and senior centers and housing complexes. Highlights of outreach events this year include the following initiatives:



ElderSource collaborated with the Women's Center of Jacksonville to provide 59 law enforcement officers and 148 social workers with elder abuse awareness and prevention training.



ElderSource participated in over 200 events and reached more than 20,000 people through community events in our seven county area.



ElderSource is one of more than 30 community organizations across the country that received a grant to assist seniors in applying for SNAP. To date over 700 new people have been assisted with a SNAP application.



For the past four years, the Mobile Resource Center has been a beacon at the outreach events. MaRCy was initially supported by a grant from the Community Foundation of Northeast Florida and for the last three years by a grant from the National Council on Aging.

Advocacy Success and Priorities

With our colleagues around the state, we have secured funding increases for the programs serving our most frail elders. ElderSource has been successful in advocating for an additional \$400,000 from the state to help people on the waiting list receive home delivered meals. Our agency has been working at the federal level for increases in the Older Americans Act funded programs and also for the SHINE Program. Additional efforts have included acquiring funding for disaster recovery and relief, additional funding from a new grant source for Senior to Senior Fund (The Jim Moran Foundation), a grant from the National Council on Aging to help older adults apply for SNAP benefits, and a grant from United Way to help older adults needing critical dental care.

Disaster Recovery

With \$295,000 from multiple funding sources — First Coast Relief Fund, Centene, AARP and the Weinberg Foundation through the Florida Association of Area Agencies on Aging — we were present at nine Disaster Recovery Centers and were able to help seniors by replenishing lost food and household items, removing trees and making home repairs.



Helping Seniors Facing Financial Crisis

161 seniors were assisted through the Senior to Senior Fund, a permanently endowed gift from J. Wayne and Delores Barr Weaver Senior to Senior Fund administered through the Community Foundation of Northeast Florida. Additionally, The Jim Moran Foundation awarded a two-year grant totaling \$290,000 to increase the Senior to Senior Fund.



Collaborations Making a Difference

ElderSource relies on strong partnerships to accomplish its mission. There are many organizations in the community who work closely with our agency to support seniors, adults with disabilities and their caregivers. A few of the collaborations include: the Senior Hunger Coalition, a group dedicated to stopping senior hunger; the Caregiver Coalition of Northeast Florida, supporting area caregivers; JEA, who administers the Emergency Home Energy Assistance Program; and the LGBT Community Fund, focused on ensuring that lesbian, gay, bisexual and transgender older adults are aware of services available to them as they age.

Engage. Educate. Empower.



ElderSource Institute engages, educates and empowers individuals to age and live with independence and dignity. ElderSource Institute focuses on serving older adults age 50 and older, caregivers, professionals who serve older adults and individuals who care about their own aging. The goal is to deliver programs and services that generate revenue that can be reinvested into ElderSource, helping them meet the growing needs of older adults in our service area.

In 2017 ElderSource Institute formally launched its website, providing a platform for online trainings and virtual workshops; and provided in-person training to over 1000 participants on various topics including: Age Sensitivity, LGBT Elder Cultural Competency, and Elder Abuse Awareness and Prevention. ElderSource Institute also collaborated with Florida State College of Jacksonville's Nursing program, UF Health Psychiatric residents' program, Baptist Behavioral Health unit, and the Rural Domestic Violence Statewide Institute to provide training for students and staff.

With a grant from the LGBT Community Fund of Northeast Florida, an LGBT Elder Friendly Business Certification Program and database were developed. Certified businesses will be able to receive referrals from the ElderSource Helpline for LGBT elders, their families and caregivers looking for trusted resources. Additionally, the LGBT Elder Cultural Competency Train-the-Trainer Program was created and is now being sold nationally. For sustainability the LGBT Elder Cultural Competency Train the Trainer Program is now being sold nationally. ElderSource Institute received grant support from the Grace H. Osborn Endowment at the Community Foundation for Northeast Florida, to deliver Healthy Eating for Successful Living workshops to older adults throughout Duval County.

ElderSource Institute Guiding Principals

We believe

- People can live their best lives after 50.
- When people are empowered they are more confident and able to make better choices.
- That delivering the highest level of service depends on the highest quality of professionals.
- Offering opportunities for personal and professional growth allows individuals and organizations to thrive.
- To be successful we need to collaborate with others.
- Communicating with passion and energy encourages people to actively engage.
- The needs of the aging population require us to be proactive and innovative in the work that we do.



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2017 Financial Summary

State

Medicaid Administrative Claiming	\$ 400,182.00
Medicaid Waiver Specialist	\$ 140,540.00
Alzheimers Disease Initiative	\$ 1,248,882.00
Community Care for the Elderly	\$ 5,117,573.00
Home Care for the Elderly	\$ 490,092.00
Local Services Program	\$ 400,000.00
Respite for Elders Living in Everyday Families	\$ 345,000.00
Total	\$ 8,142,269.00

Federal

Older Americans Act	\$ 7,898,757.00
Serving Health Insurance Needs of the Elderly	\$ 194,006.00
Elder Abuse Prevention & Awareness	\$ 21,267.00
Nutrition Services Incentive Program	\$ 522,545.00
Emergency Home Energy	\$ 371,705.00
Medicare Improvements for Patients & Providers Act	\$ 273,575.00
Total	\$ 9,281,855.00

Other Programs

Disaster Recovery	\$ 272,703.00
Community Foundation Senior to Senior	\$ 150,000.00
Jim Moran Senior to Senior	\$ 45,000.00
United Way	\$ 100,000.00
Community Foundation LGBT	\$ 40,660.00
Program to Encourage Active Rewarding Lives for Seniors	\$ 17,185.00
Care Transitions Coaching	\$ 85,000.00
Benefits Enrollment Center	\$ 50,000.00
Veterans Directed Care	\$ 962,506.00
Fundraising	\$ 44,585.00
Contributions	\$ 9,316.00
Supplemental Nutrition Assistance Program	\$ 42,576.00
Miscellaneous	\$ 146,778.00
Total	\$ 1,966,309.00

Total Revenue \$ 19,390,433.00

Services

Elder Helpline	\$ 568,933.00
Serving Health Insurance Needs of the Elderly	\$ 194,006.00
Disaster Recovery	\$ 272,703.00
Community Foundation Senior to Senior	\$ 150,000.00
Jim Moran Senior to Senior	\$ 45,000.00
Supplemental Nutrition Assistance Program	\$ 42,576.00
Veterans Directed Care	\$ 829,817.00
Lesbian Gay Bisexual Transgender Community Education	\$ 40,660.00
Other Program Services	\$ 957,554.00
Total	\$ 3,101,249.00

Contracts to Sub-Recipients

Baker County	\$ 408,588.00
Clay County	\$ 997,688.00
Duval County	\$ 6,501,645.00
Flagler County	\$ 732,596.00
Nassau County	\$ 689,885.00
St. Johns County	\$ 1,243,710.00
Volusia County	\$ 4,096,433.00
Veterans Directed Care Consultant	\$ 51,852.00
Care Transitions Meals	\$ 7,208.00
Program to Encourage Active Rewarding Lives for Seniors	\$ 17,185.00
Total	\$ 14,746,790.00

Administration

Personnel Services	\$ 688,981.00
Building Expenses	\$ 248,792.00
Professional Services	\$ 172,630.00
Administrative Operations	\$ 431,991.00
Total	\$ 1,542,394.00

Total Expense \$ 19,390,433.00

Other Highlights



ElderSource staff is dedicated in the office, but showing their pride in the community as well! A team of employees volunteered their time for the Make a Difference Day, painting the home of a senior in need.



The Night with the Stars event showcased amazing entertainment, food and a glitzy ambiance. Dr. Ken Tannenbaum was honored as the 2017 Delores Bar Weaver Elder Advocate.



The Veterans Directed Home and Community Based Care Program allows the veteran to become an employer and hire who they want to provide the care they want and need. ElderSource works with the Veterans Administration Medical Centers to provide this program to veterans they refer to us.

*This page reflects budgeted Revenue and Expense for 2017 and is not a financial statement. Audited financial statements for the Agency may be reviewed at our offices.



We are grateful for our supporters and sponsors



AgeWell Center



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