







**Report Highlights:**

Adult Protective Services - All high risk referrals were accepted with the exception of one which was rejected for an approved reason. ElderSource continue to review APS High Risk Referral files monthly and provides technical assistance if errors are identified. ElderSource submitted documentation to DOEA to support all requirements being met for Corrective Action Plan and is waiting for acceptance. One Provider received a finding during their Annual Programmatic Monitoring for the handling of APS Files. Additional training will be provided by ElderSource staff to this Provider.

Aging Out Clients - All Aging Out Client information has been distributed to Providers. Providers are working with Clients to determine continuing service needs and to minimize any disruption in services provided as the Client transitions their care from the Department of Children and Families to DOEA-funded programs.

Reopening Plans – Aging True and Volusia County Council on Aging are the only Providers who currently have facilities open. They are following CDC mandates and setting limits on the number of individuals who can attend the center on any given day. Aging True has five adult day care centers open. Volusia County Council on Aging has 2 adult day care facilities and 2 congregate meal sites open.

ADRC NWD – Several projects have been initiated utilizing the ADRC No Wrong Door funding. This funding is to be used for new projects to support agencies in responding to the COVID pandemic. It can also be used for new projects to assist seniors impacted by COVID. Currently, there are six projects funded which include: Uniper, GetSetUp, CHAT, Avaya Phone System, Internet/Mifis and a Volunteer Database.

**Reporting Period:** 2022

## Motionable Items

1) 2020 OAA Final Allocations - Allocations are based on formula and surplus/deficits presented in each county.

Provider	IIIB	IIIC1	IIIC2	IIIE	IIID	NSIP	OAA Contract
Aging True	\$ 360,672.85	\$ 116,980.15	\$ 562,159.31	\$ 299,133.90	\$ 92,343.25	\$ 121,055.99	\$ 1,947,453.57
Baker	\$ 92,774.53	\$ 35,279.49	\$ 50,180.45	\$ 16,169.40	-	\$ 14,526.72	\$ 262,792.62
Clay	\$ 127,873.85	\$ 237,766.31	\$ 103,753.59	\$ 64,677.60	-	\$ 38,737.92	\$ 701,057.69
COJ	\$ 329,662.94	\$ 753,766.75	-	-	-	\$ 150,109.42	\$ 1,423,288.78
Flagler	\$ 184,507.08	\$ 38,574.09	\$ 123,148.36	\$ 48,508.20	-	\$ 24,211.20	\$ 511,182.23
Nassau	\$ 167,503.26	\$ 44,859.60	\$ 115,792.19	\$ 40,423.50	-	\$ 14,526.72	\$ 449,973.81
St. Johns	\$ 283,385.82	\$ 136,960.25	\$ 150,201.71	\$ 80,847.00	-	\$ 24,211.20	\$ 808,825.91
Volusia	\$ 665,563.76	\$ 280,065.50	\$ 839,451.27	\$ 242,541.00	-	\$ 96,841.83	\$ 2,537,473.53
CLSMF	\$ 87,843.04	-	-	\$ 27,727.70	-	-	\$ 115,570.74
JALA	\$ 180,994.61	-	-	\$ 24,199.70	-	-	\$ 205,194.31
AHEC	-	-	-	-	\$ 174,535.84	-	\$ 174,535.84

2) 2021 State General Revenue Increases - Allocations are based on formula and surplus/deficits presented in each county.

### Alzheimer's Disease Initiative

Provider	Initial Contract Amount	Increase 1	Increase 2	Total 2020 - 2021
Baker CCOA	\$ 70,289.72	\$ 11,568.90	\$ 11,776.40	\$ 93,635.02
Clay CCOA	\$ 146,366.21	\$ 15,039.57	\$ 15,309.32	\$ 176,715.10
Aging True	\$ 518,403.97	\$ 41,648.05	\$ 42,395.03	\$ 602,447.05
Flagler County	\$ 141,096.29	\$ 15,039.57	\$ 15,309.32	\$ 171,445.18
Nassau CCOA	\$ 98,254.13	\$ 13,882.68	\$ 14,131.68	\$ 126,268.49
St. Johns CCOA	\$ 195,571.75	\$ 18,510.24	\$ 18,842.24	\$ 232,924.23
Volusia CCOA	\$ 559,297.92	\$ -	\$ -	\$ 559,297.92
TOTAL	\$ 1,729,280.00	\$ 115,689.02	\$ 117,763.98	\$ 1,962,733.00

Community Care for the Elderly			
Provider	Initial Contract Amount	Increase 2020 - 2021	Total
Baker CCOA	\$ 146,278.00	\$ 10,652.65	\$ 156,930.65
Clay CCOA	\$ 298,705.00	\$ 21,753.09	\$ 320,458.09
Aging True	\$ 2,317,642.00	\$ 168,781.49	\$ 2,486,423.49
Flagler County	\$ 192,667.00	\$ 14,030.91	\$ 206,697.91
Nassau CCOA	\$ 219,318.00	\$ 15,971.76	\$ 235,289.76
St. Johns CCOA	\$ 373,393.00	\$ 27,192.22	\$ 400,585.22
Volusia CCOA	\$ 1,571,944.00	\$ 114,476.29	\$ 1,686,420.29
Providers Total	\$ 5,119,947.00	\$ 372,858.39	\$ 5,492,805.39

Home Care for the Elderly			
Provider	Initial Contract Amount	Increase 2020 - 2021	Total
Baker	\$ 17,380.00	\$ 1,119.08	\$ 18,499.08
Clay	\$ 56,868.00	\$ 3,661.66	\$ 60,529.66
Aging True/COJ	\$ 325,287.00	\$ 20,944.82	\$ 346,231.82
Flagler	\$ 17,595.00	\$ 1,132.92	\$ 18,727.92
Nassau	\$ 46,350.00	\$ 2,984.42	\$ 49,334.42
St. Johns	\$ 37,109.00	\$ 2,389.40	\$ 39,498.40
Volusia	\$ 174,063.00	\$ 11,207.70	\$ 185,270.70
Total	\$ 674,652.00	\$ 43,440.00	\$ 718,092.00

3) Coronavirus Consolidated Appropriations Act - Allocations are based on formula and surplus/deficits presented in each county.

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Provider	Total
Aging True	\$ 216,548.20
Baker	\$ 41,432.48
Clay	\$ 61,253.07
COJ	\$ 223,096.20
Flagler	\$ 72,703.18
Nassau	\$ 64,227.71
St. Johns	\$ 88,674.68
Volusia	\$ 347,545.48
Total Providers	\$ 1,115,481.00

## Surplus Deficit

Program	Contract Amount	Projected S/D (Straight Line Projection)	Projected S/D (Based on current monthly spending)	Projected S/D (Based on Average Monthly Spending)	Comments
ADI	\$1,729,280.00	\$554,204.20	\$747,894.48	\$554,204.20	Projecting a surplus. Will visit transferring funds following January billing. Surplus is mainly due to the closure of adult day care centers and the refusal of in-home respite services.
CCE	\$5,510,884.00	\$810,674.84	\$781,502.76	\$810,674.84	Projecting a surplus. Will visit transferring funds following January billing. Surplus is mainly due to the refusal of in-home respite services.
HCE	\$746,823.00	\$55,196.36	\$220,295.98	\$103,096.49	Projecting a surplus. Will visit transferring funds following January billing. Providers are requesting additional clients to serve through program.
LSP	\$400,000.00	\$23,010.88	\$61,819.54	\$23,010.88	Spending in this program will increase as the CARES funding is depleted. Current projections reflect a projected surplus but we will have a clearer picture in the next couple of months.
LSP-JFCS	\$250,000.00	\$42,238.72	(\$30,112.70)	\$21,462.59	Spending in this program increased \$11,820 between the months of November and December. While current projections reflect a surplus, if monthly spending continues at this rate, the contract will be spent out.
RELIEF	\$335,000.00	\$40,952.32	(\$23,314.02)	\$40,952.32	



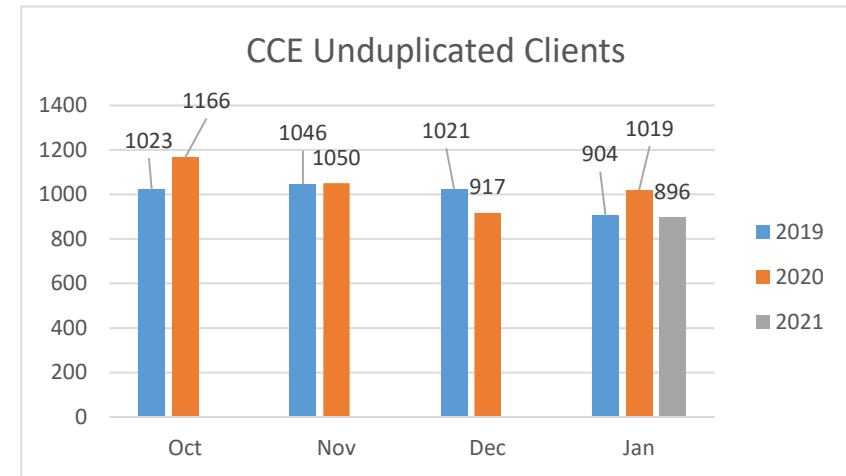
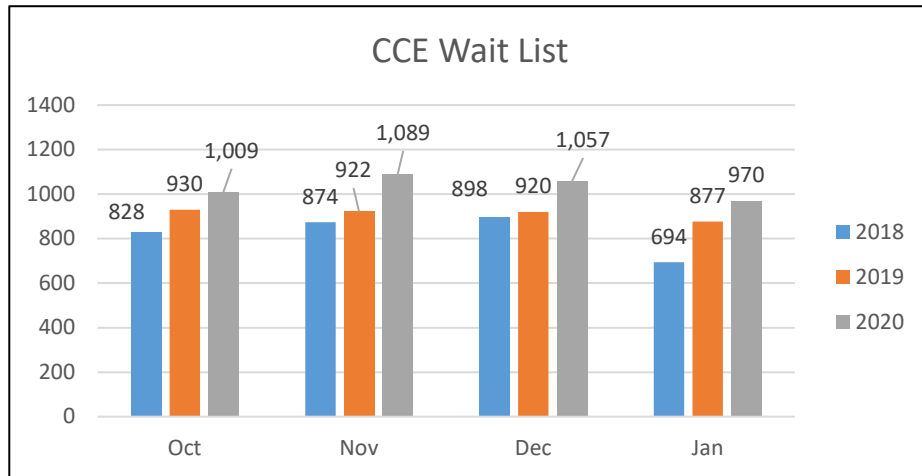
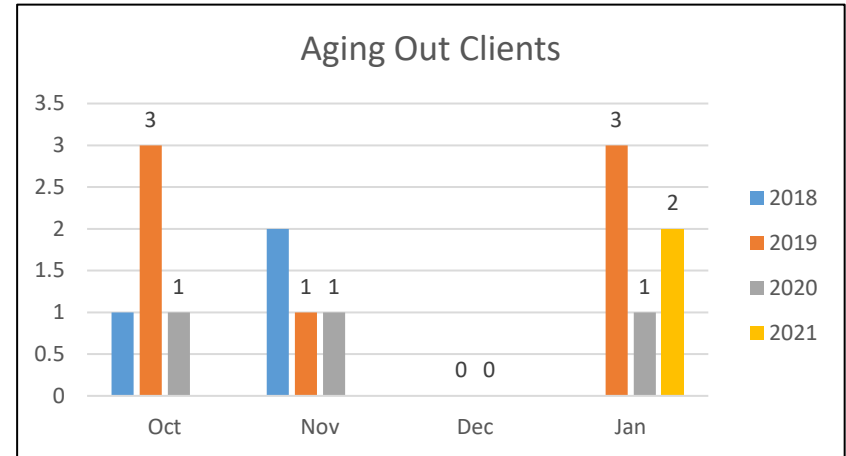
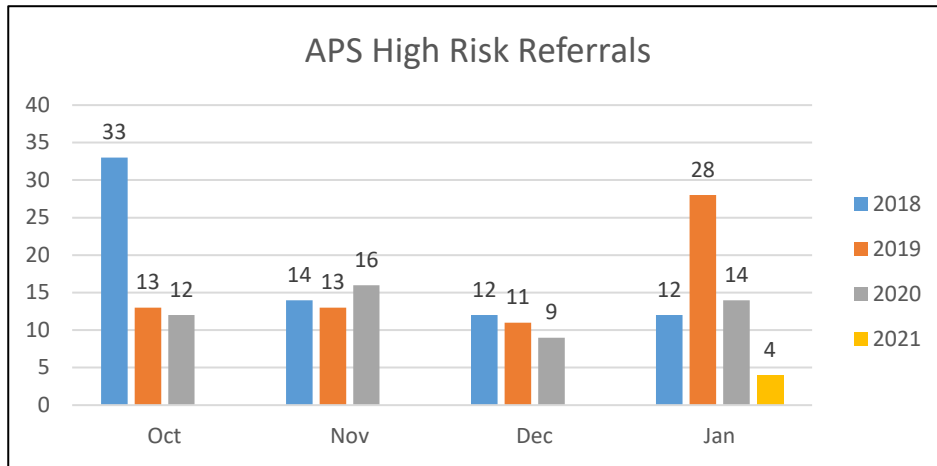
OA3B	\$3,963,317.58	\$857,162.77			Final month of contract. Additional detail to be provided during Committee meeting.
O3C1	\$1,644,252.14	(\$282,159.21)			Carry Forward available for Older Americans Act contracts.
OA3D	\$266,879.09	\$53,493.25			
O3C2	\$1,944,686.88	\$389,716.93			
NSIP	\$561,931.18	(\$393,394.34)			
OA3E	\$990,857.00	\$287,814.32			
EHEAP	\$507,742.00	(\$8,409.02)	(\$50,529.27)	(\$8,409.02)	
EHEAP-CARES	\$309,967.00	(\$21,784.97)	\$88,420.29	(\$21,784.97)	Five of the seven EHEAP Providers are currently spending EHEAP-CARES funds. Funds will be spent out at a higher rate once all Providers have depleted their initial EHEAP funds and are using their CARES EHEAP.
CARES	\$4,699,655.00				CARES Funding is depleted for all but three Providers. We project to spend out prior to contract end.

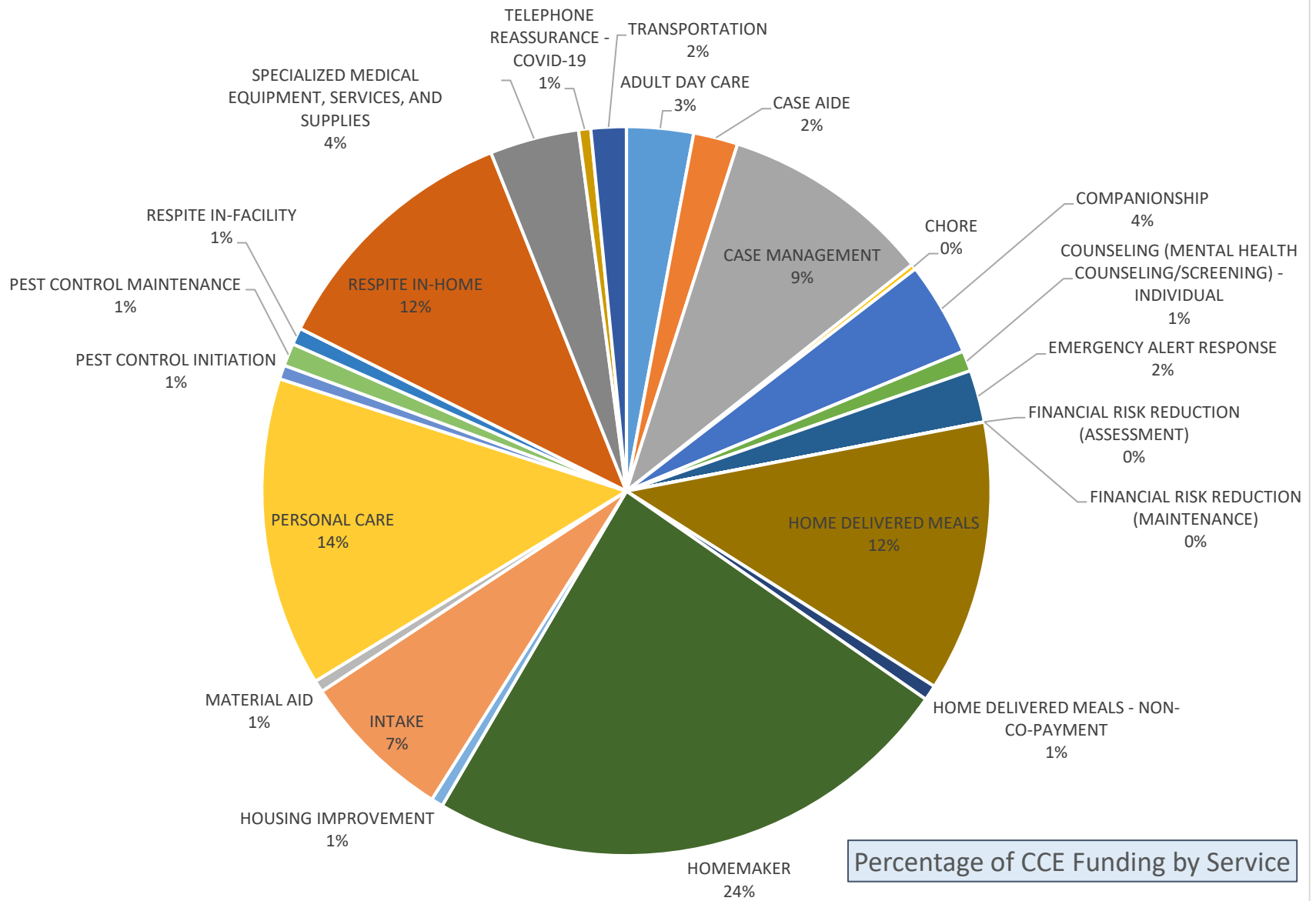
### Community Care for the Elderly

The primary purpose of the CCE program is to prevent, reduce or delay premature or inappropriate placement of older persons in nursing homes and other institutions. Additional purposes of the CCE program are to provide the following: 1) a continuum of services alternatives to meet the diverse needs of older people; access to services for elder most in need; and a local resource that will coordinate delivery of services for the frail elder/caregiver.

# of Providers	Total Contract Amount
7	\$5,510,884.00

Contract Cycle:	July 01, 2020 - June 30, 2021
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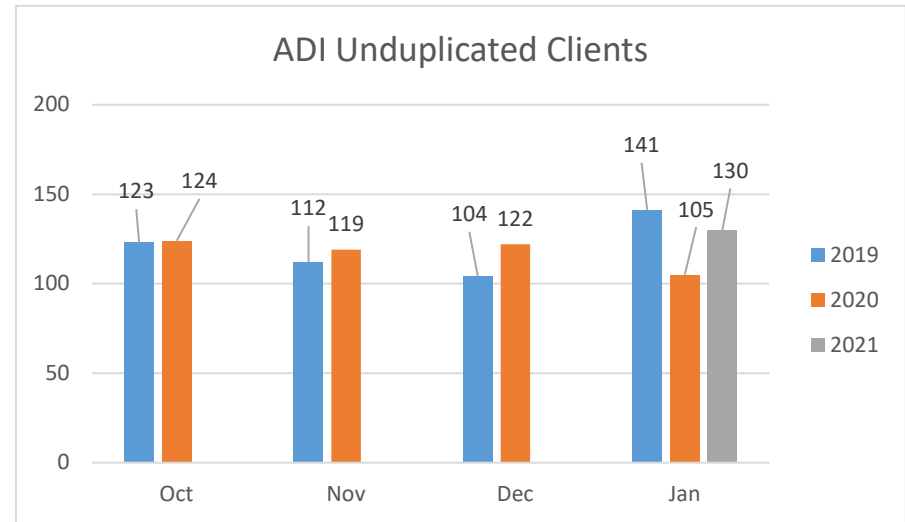
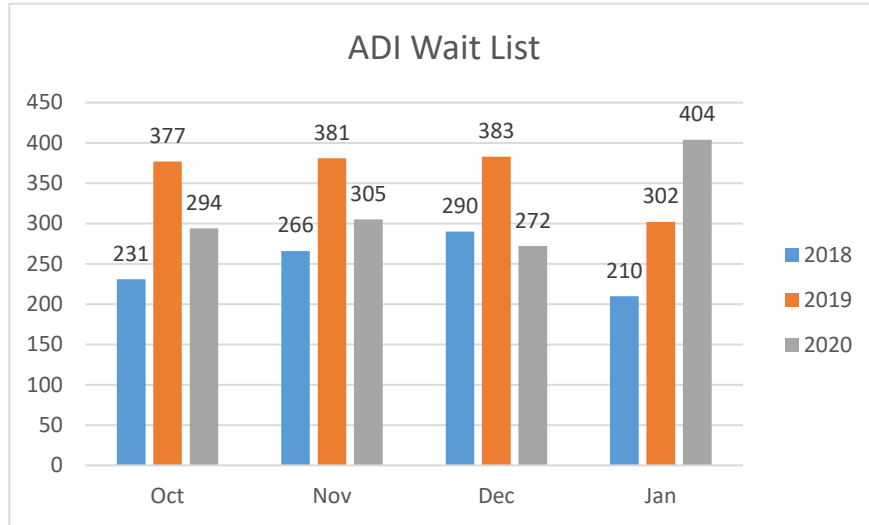


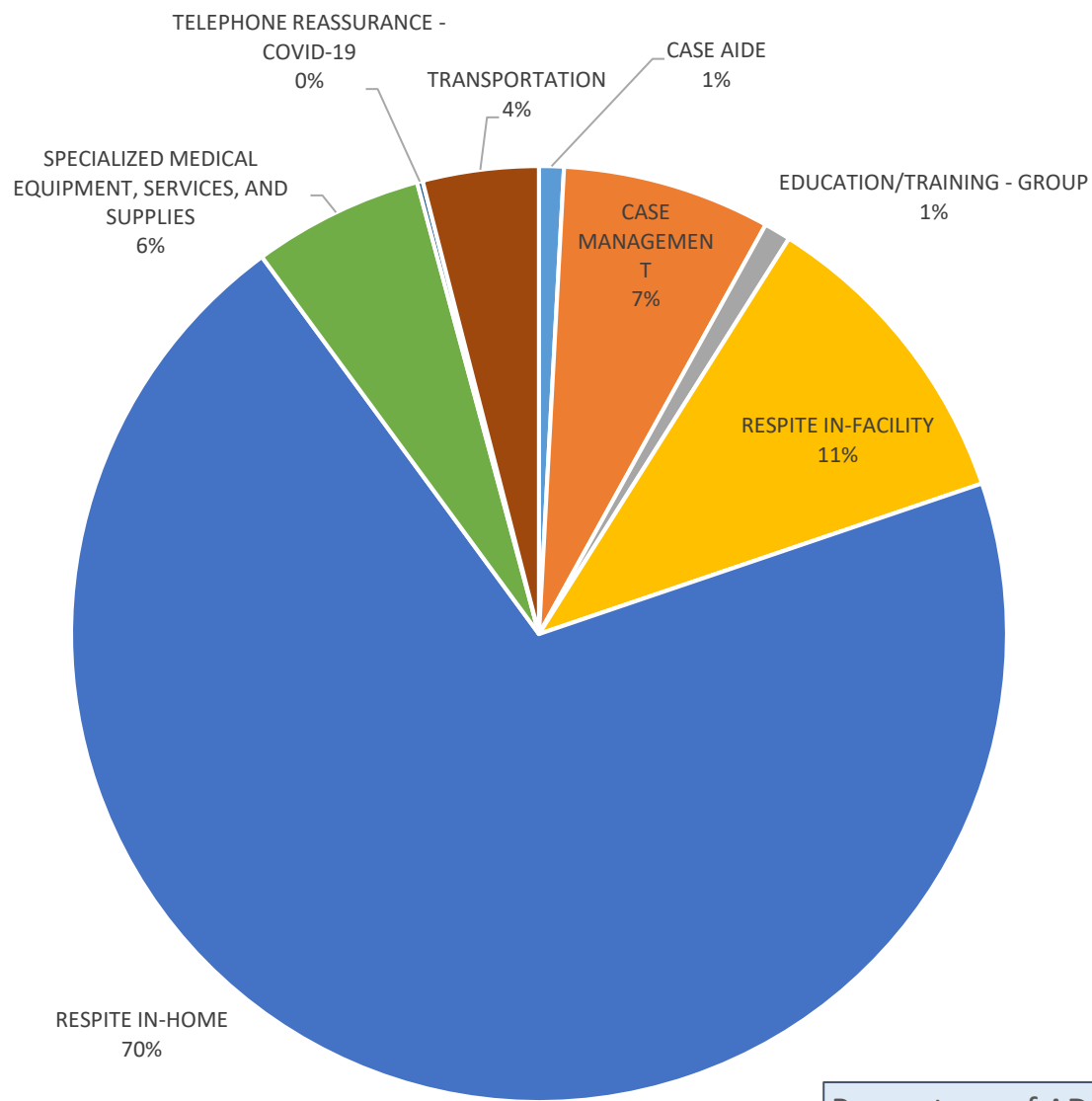
### Alzheimer's Disease Initiative (ADI)

The purpose of the ADI is the following: to address the special needs of clients with Alzheimer's Disease (AD) or related memory disorders, as well as their caregivers; and to find through research the cause, treatment and ultimately a cure for AD or related memory disorders.

# of Providers	Total Contract Amount
7	\$1,962,733.00

Contract Cycle:	July 01, 2020 - June 30, 2021
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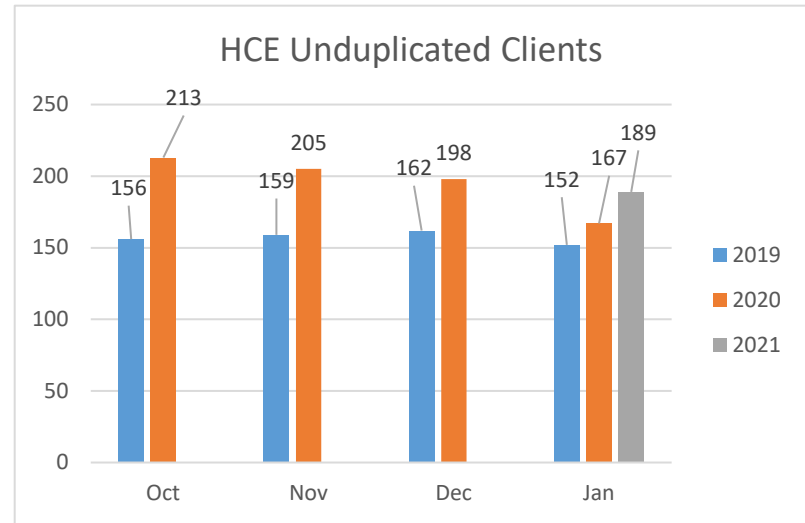
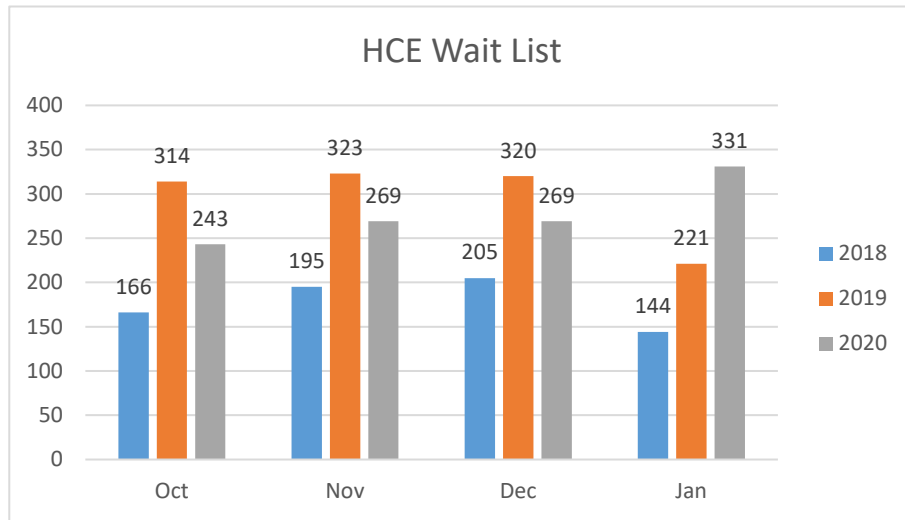
Percentage of ADI Funding by Service

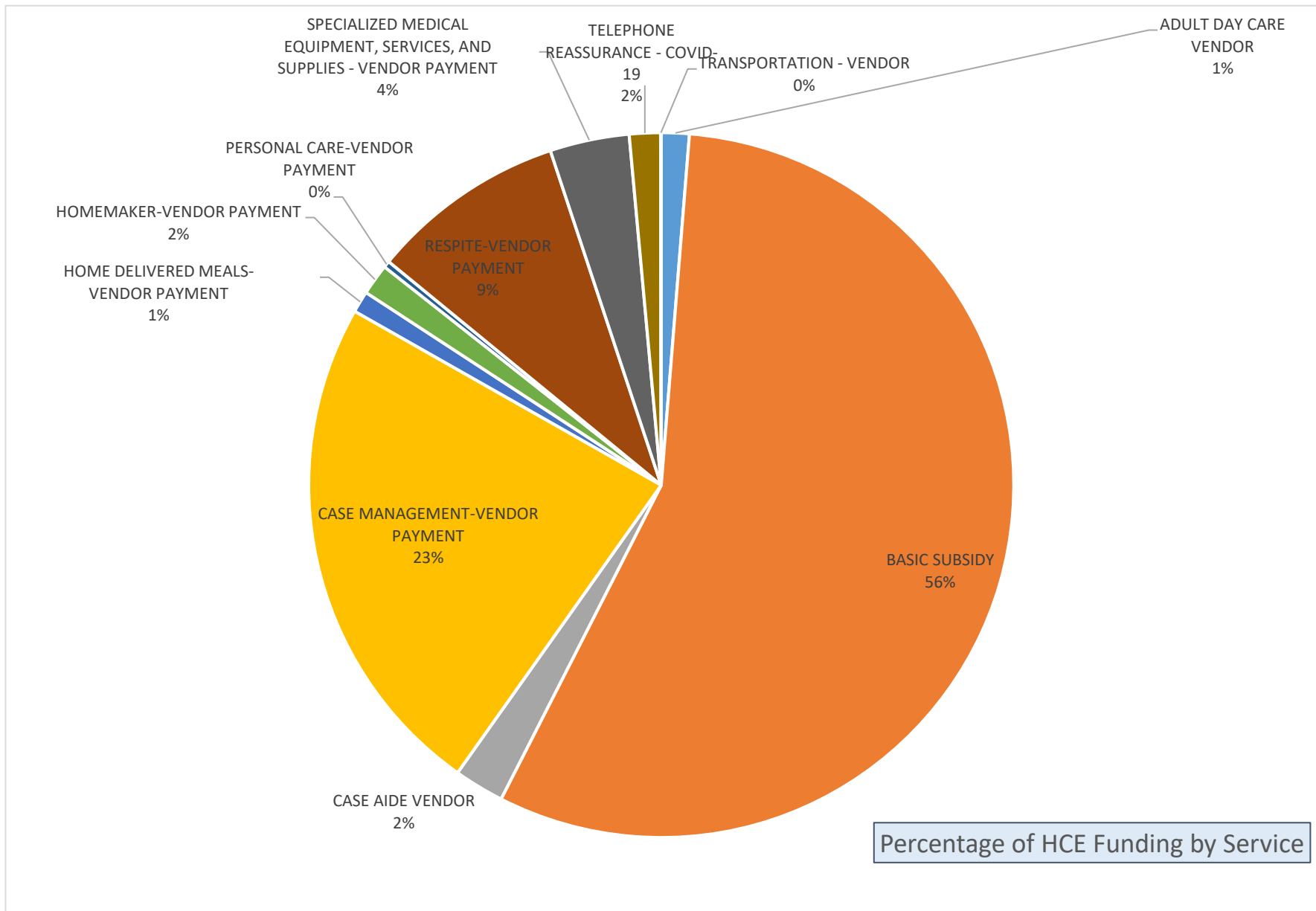
### Home Care for the Elderly

The purpose of the HCE Program is to encourage the provision of care for elders in family-type living arrangements in private homes as an alternative to nursing homes or other institutional care settings.

# of Providers	Total Contract
7	\$746,823.00

Contract Cycle:	July 01, 2020 - June 30, 2021
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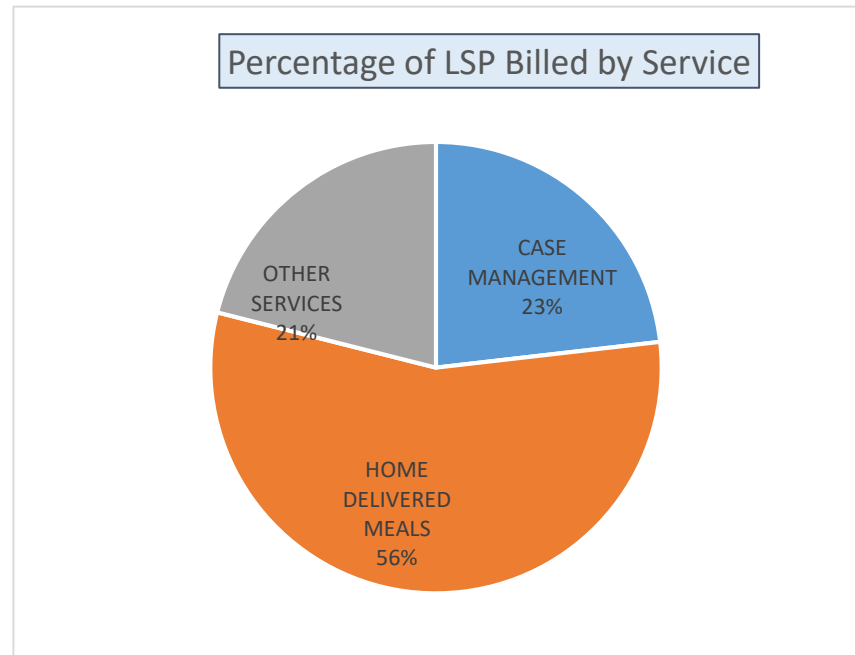
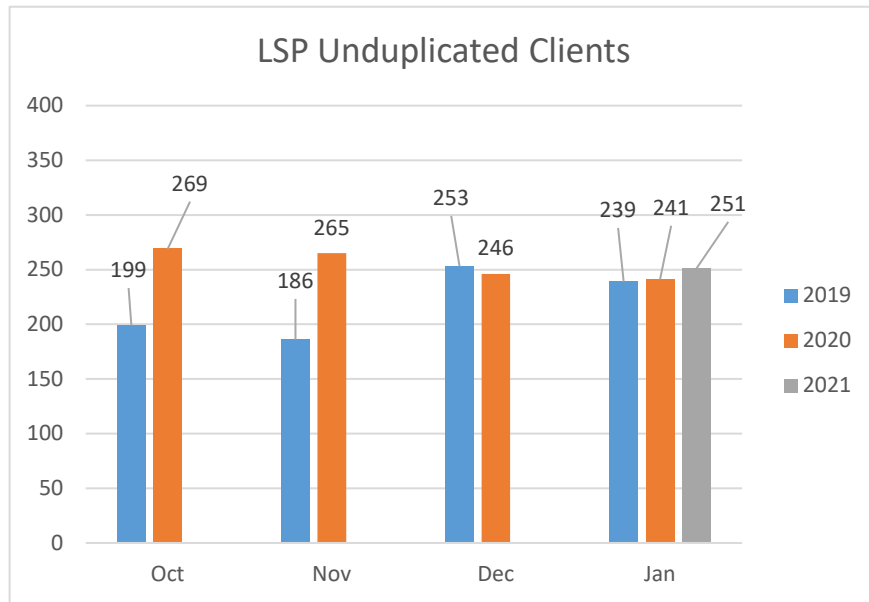
### Local Service Programs

The LSP provides community-based services to preserve elders' independence, support caregivers, and target at-risk persons. Through the provision of meals or other services authorized by proviso, the LSP assists elders to live in the least restrictive environment that meets their needs. In PSA 4, we contract with the 7 Lead Agencies to provide home delivered meals for individuals who would otherwise remain on a wait list. We also contract with Jewish Family and Community Services to assist Holocaust Survivors.

There is no wait list for these programs. The home-delivered meal program works off of the O3C2 wait list.

# of Providers	Total Contract
8	\$650,000.00

Contract Cycle:	July 01, 2020 - June 30, 2021
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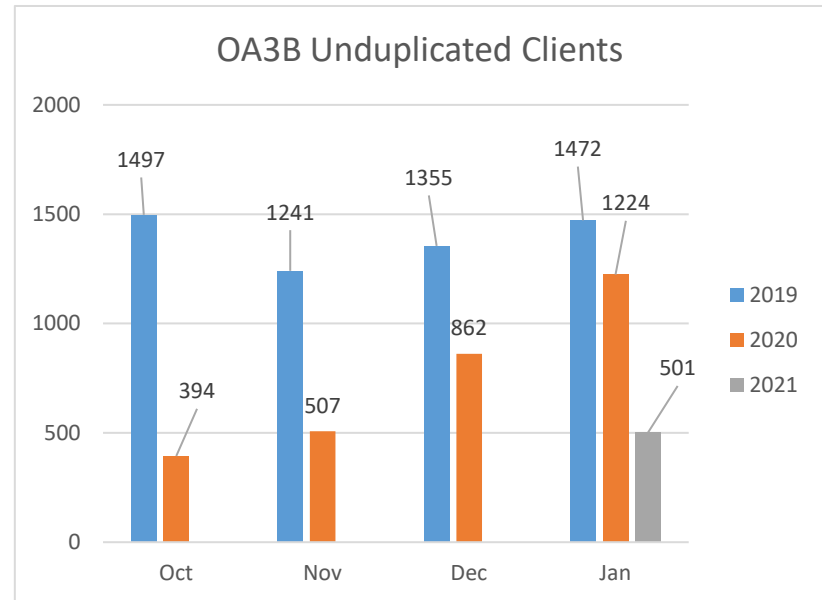
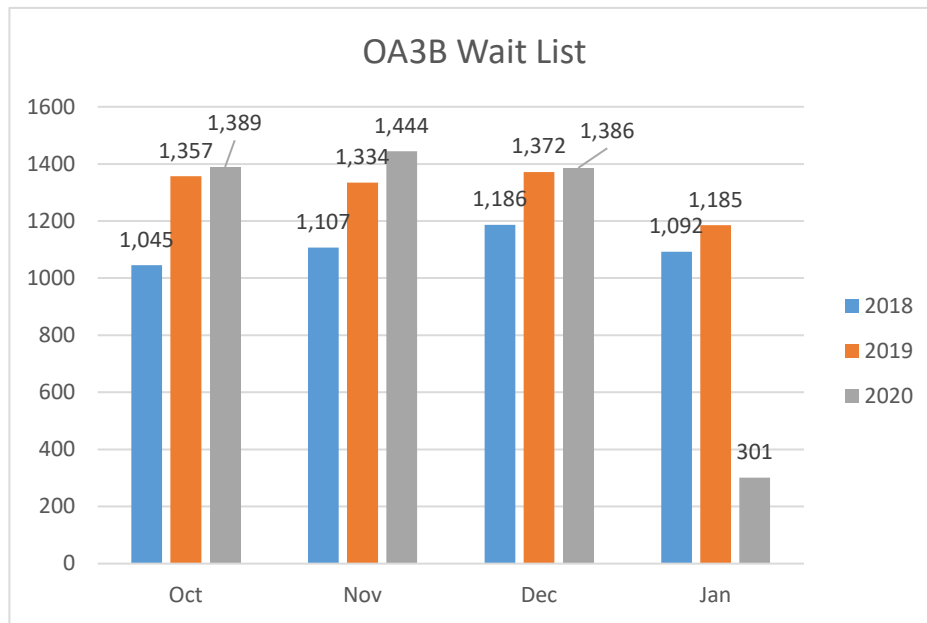


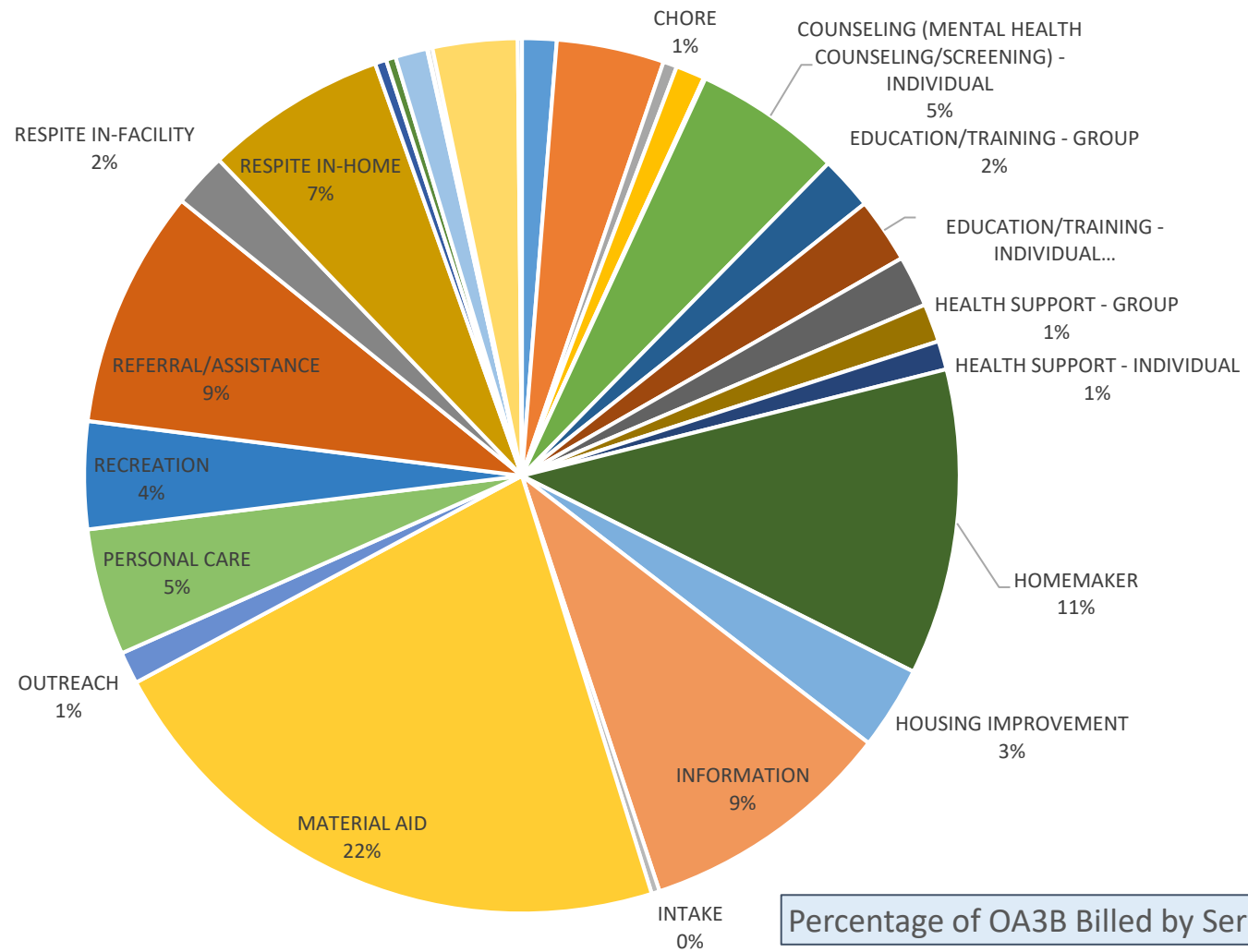
### Older Americans Act Title IIIB

Title IIIB supportive services deliver the following three categories of service; access services such as transportation, outreach, information and referral and case management; in-home services such as homemaker, home health aide, home repair, companionship, telephone reassurance, chore, respite and other supportive services for families of elderly victims of Alzheimer's disease and other neurological and organic brain disorders of the Alzheimer's type; and legal assistance related to income, health care, long term care, nutrition, housing, utilities, protective services, defense of guardianship, abuse, neglect, and age discrimination.

# of Providers	Providers Funding
10	\$2,816,425.18

Contract Cycle:	January 01, 2021 - December 31, 2021
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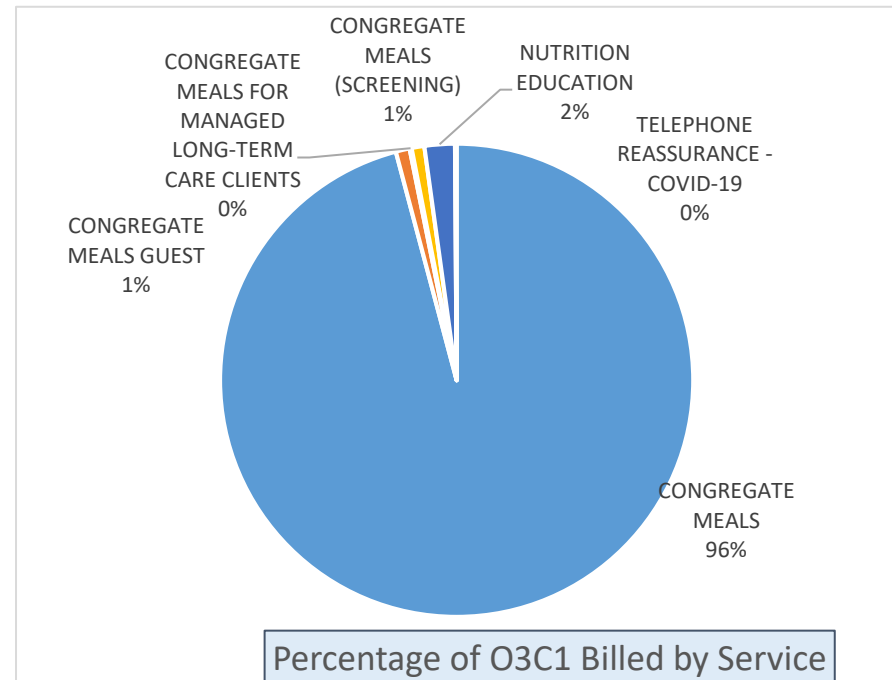
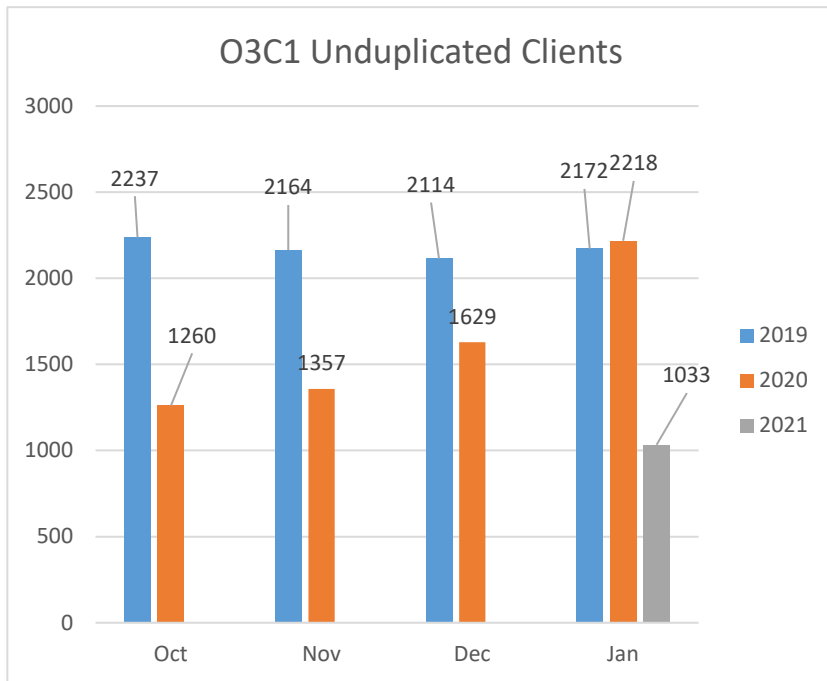


### Older Americans Act Title IIIC1

The purpose of Title IIIC is for the provision of nutrition services that assist older individuals in Florida to live independently, with better health through improved nutrition and reduced isolation. Nutrition services are provided through programs coordinated with nutrition-related supportive services and include the procurement, preparation, transport, and service of meals; nutrition education; nutrition screening; nutritional assessment, and nutrition counseling. In making these awards, the AAA must ensure that congregate and home-delivered meals are provided to eligible individuals based on their assessment of need. IIIC1 is primarily for congregate meal settings. IIIC2 is primarily for home-delivered meal programs. Currently, there is no wait list for this program.

# of Providers	Total Contract
8	\$1,566,456.01

Contract Cycle:	January 01, 2021 - December 31, 2021
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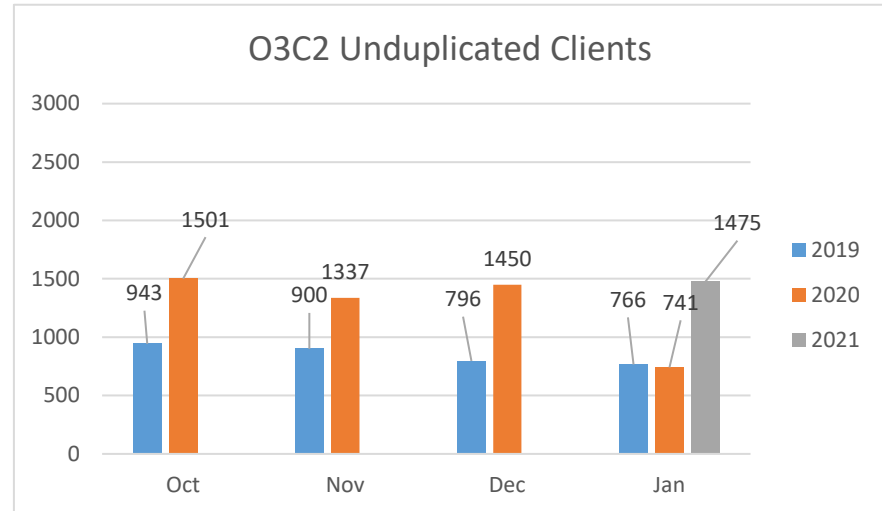
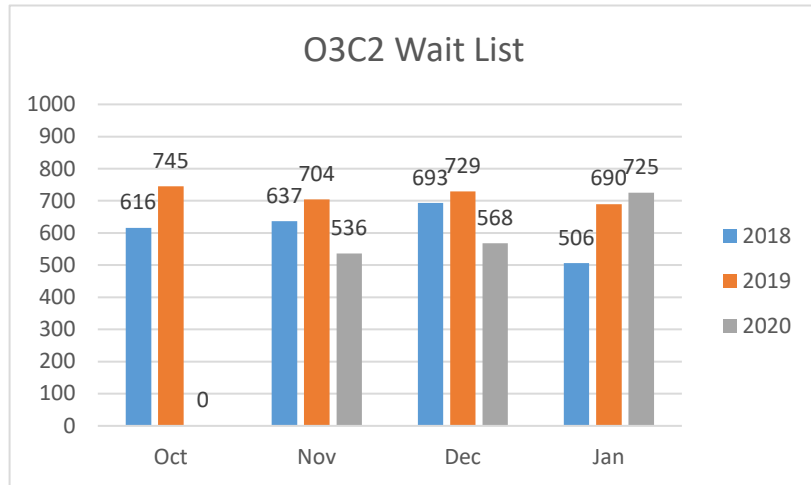


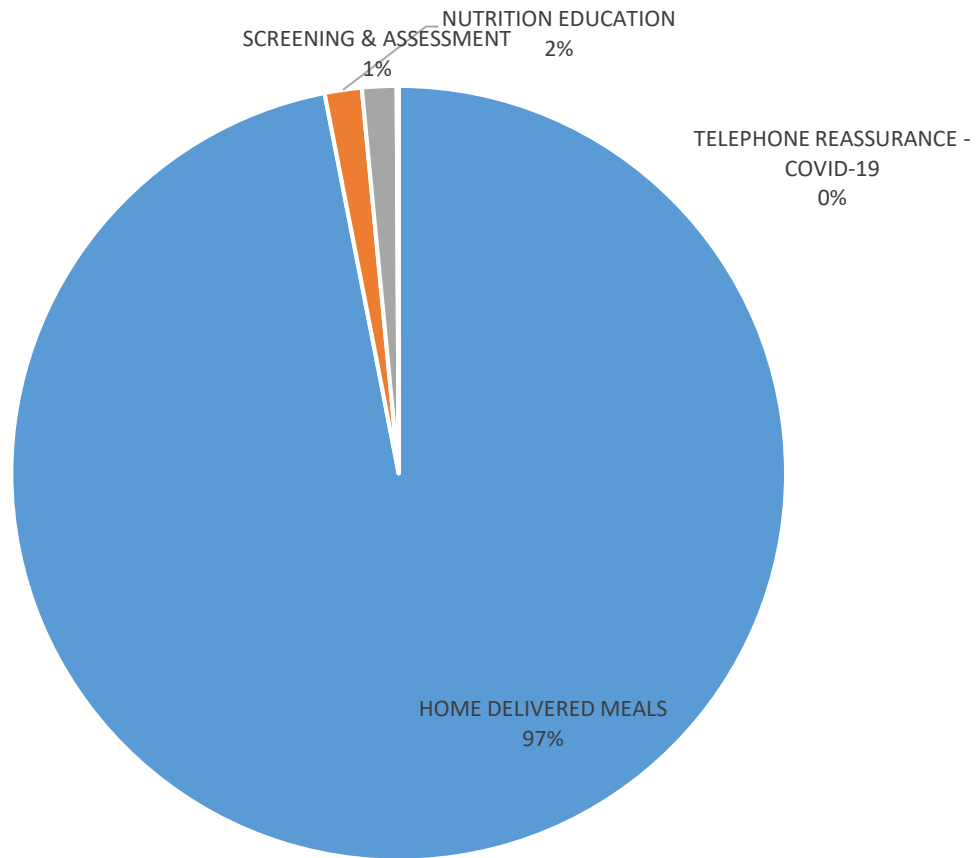
## Older Americans Act Title IIIC2

The purpose of Title IIIC is for the provision of nutrition services that assist older individuals in Florida to live independently, with better health through improved nutrition and reduced isolation. Nutrition services are provided through programs coordinated with nutrition-related supportive services and include the procurement, preparation, transport, and service of meals; nutrition education; nutrition screening; nutritional assessment, and nutrition counseling. In making these awards, the AAA must ensure that congregate and home-delivered meals are provided to eligible individuals based on their assessment of need. IIIC1 is primarily for congregate meal settings. IIIC2 is primarily for home-delivered meal programs.

# of Providers	Total Contract
7	\$1,889,458.81

Contract Cycle:	January 01, 2021 - December 31, 2021
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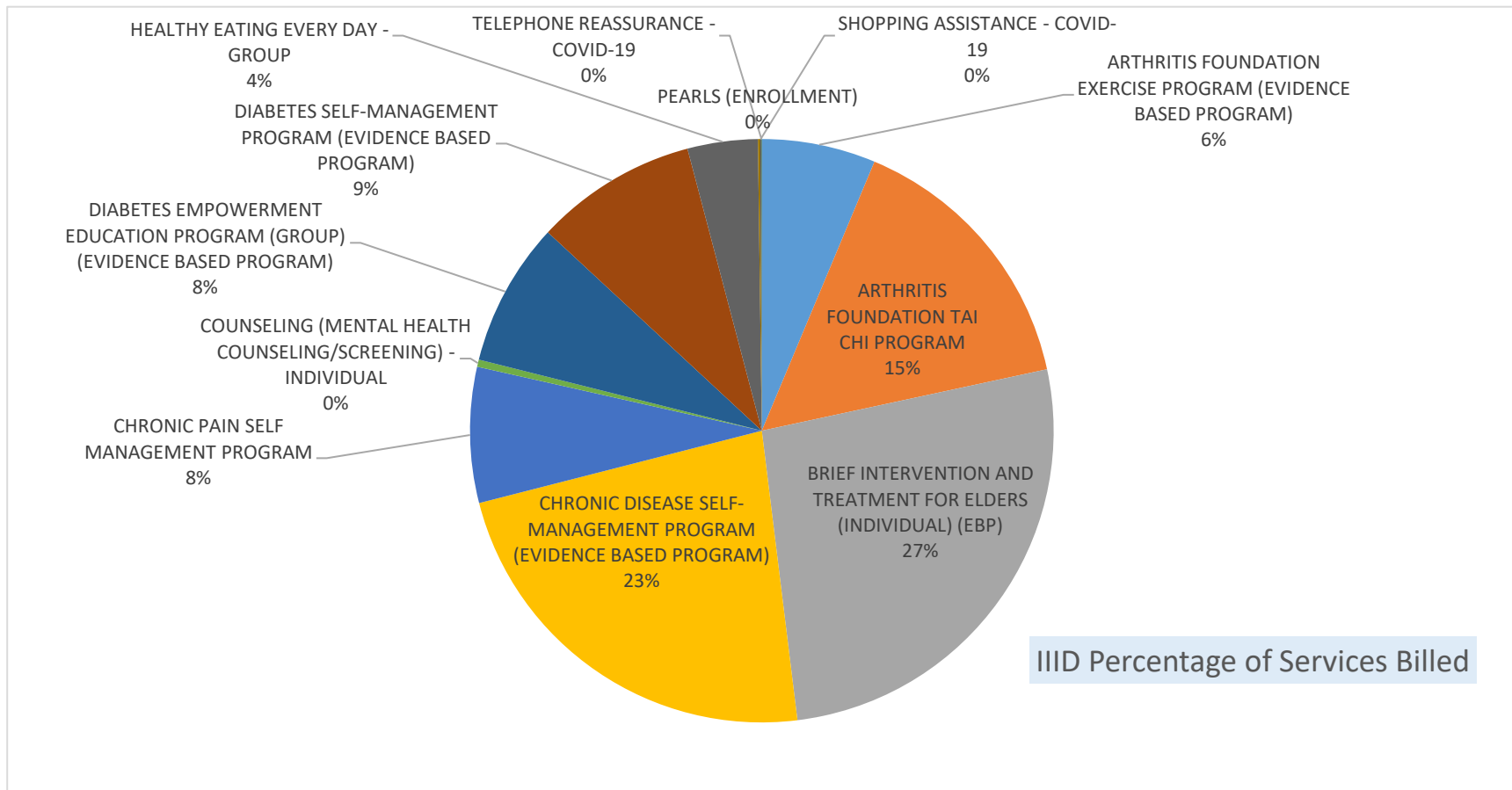
Percentage of O3C2 Billed by Service

### Older Americans Act Title IIID

The primary purpose of the Title IIID Evidence-based Disease Prevention and Health Promotion program is to provide services and activities that have been demonstrated through rigorous evaluation to be effective evidence-based programs to assist older adults in maintaining a healthy lifestyle.

# of Providers	Total Contract
2	\$144,664.00

Contract Cycle:	January 01, 2021 - December 31, 2021
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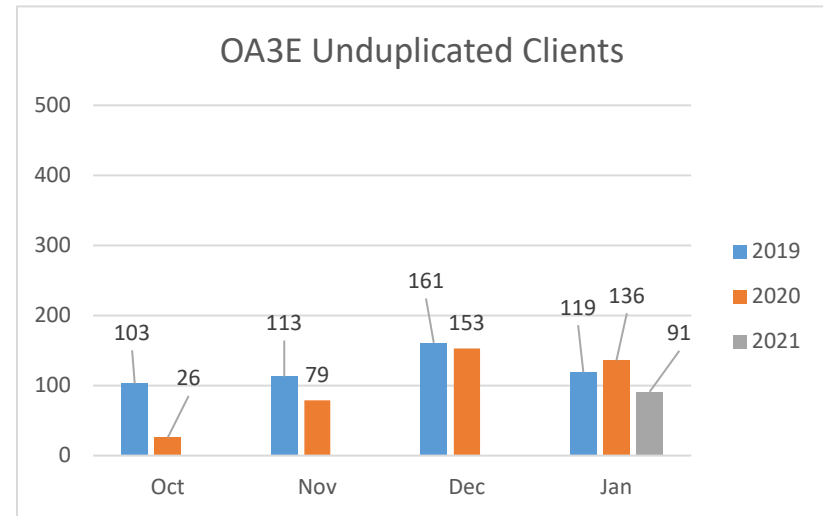
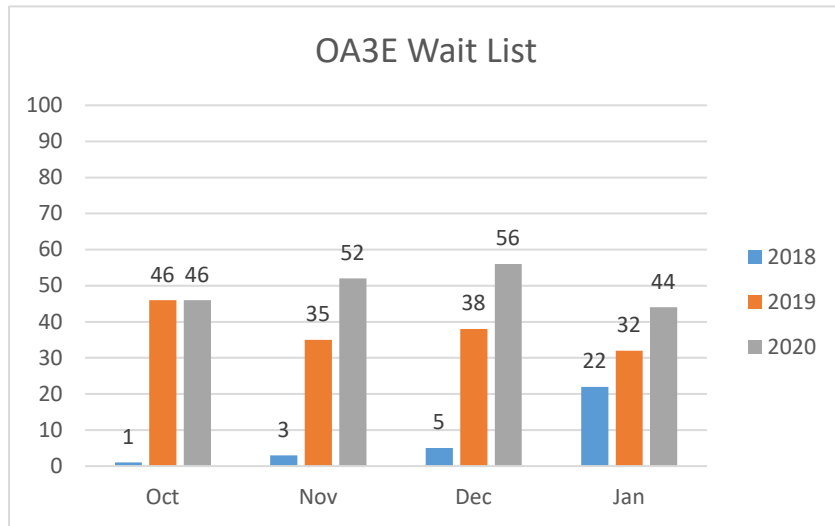


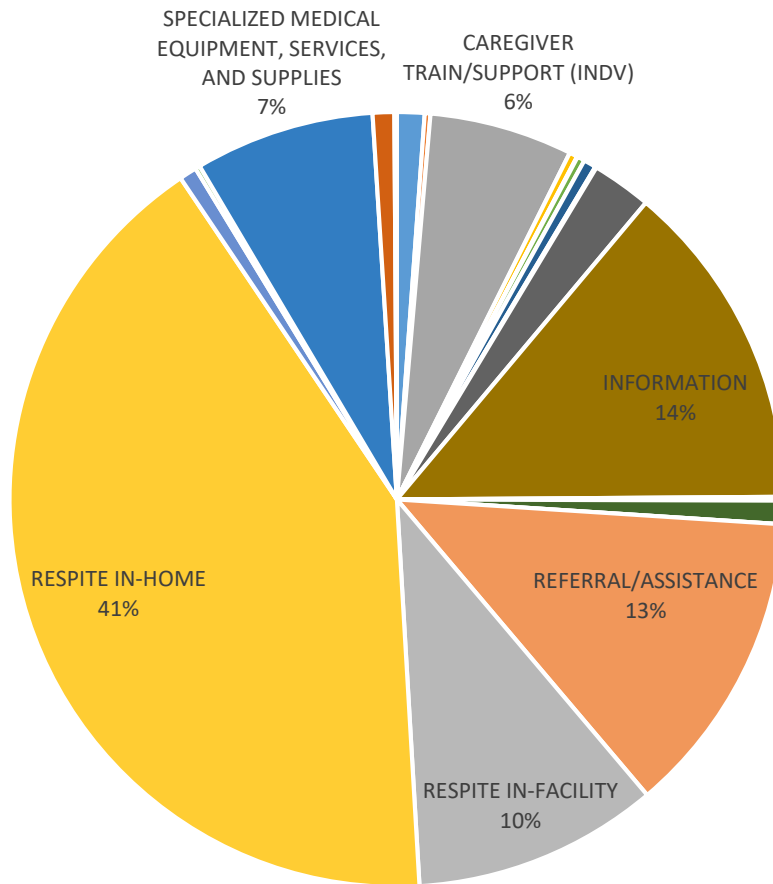
### Older Americans Act Title III E

The purpose of Title III E is to provide multifaceted systems of support services to the following individuals; family caregivers and grandparents or older individuals, 55 years of age or older, who are relative caregivers of children not more than 18 years old or individuals with disabilities.

# of Providers	Total Contract
10	\$955,099.00

Contract Cycle:	January 01, 2021 - December 31, 2021
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Percentage of OA3E Billed by Service



**United Way Baldwin**

United Way Baldwin grants ElderSource \$100,000 each year to provide meals for individuals who are on the O3C2 (home-delivered meals) wait list. Based on their service demographic, \$90,000 of this funding is distributed to Providers and is used to provide home-delivered meals.

# of Providers	Total Contract
4	\$100,000.00

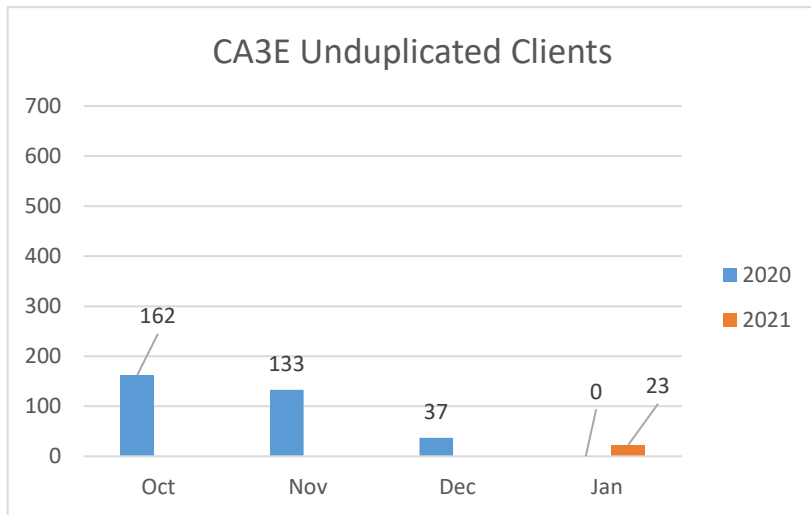
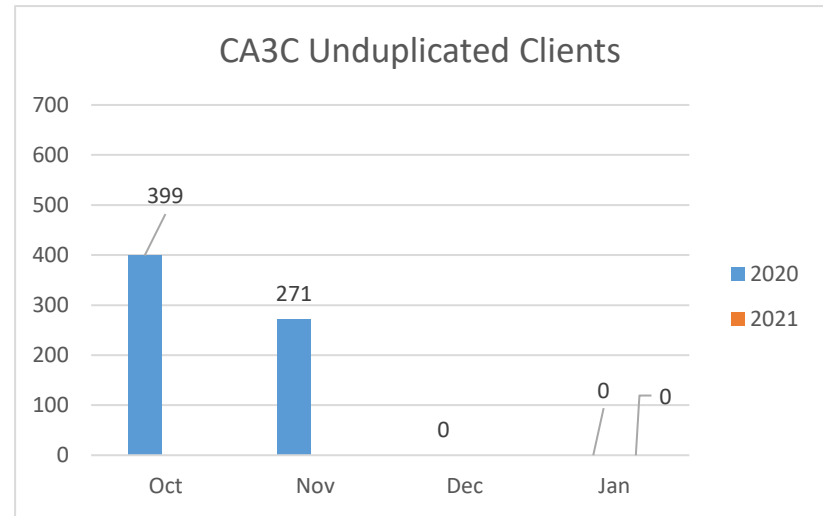
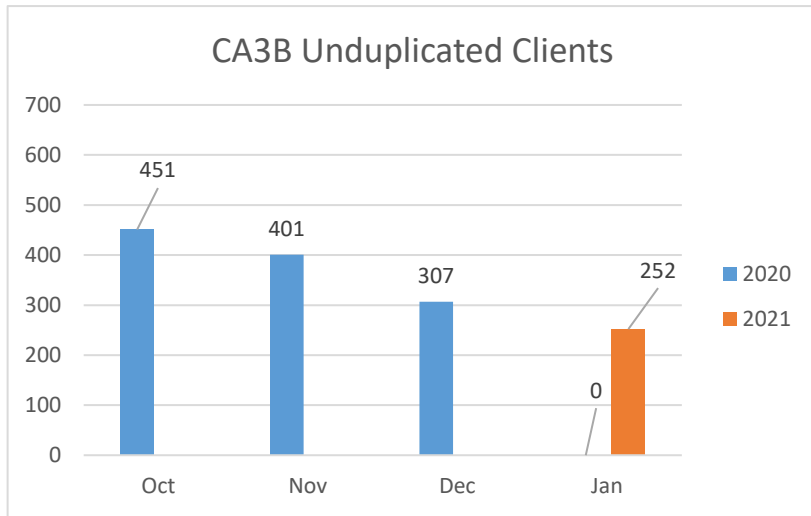
Contract Cycle:	July 01, 2020 - June 30, 2021
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Mid Year Reporting - July 01, 2020 - December 31, 2021			
PROVIDER	DESCRIPTION	# of Clients	# of Meals
Baker County Council on Aging	HOME DELIVERED MEALS	5	855
Clay Senior Services of Aging True	HOME DELIVERED MEALS	30	1643
Aging True	HOME DELIVERED MEALS	26	2867
Nassau County Council on Aging	HOME DELIVERED MEALS	17	810

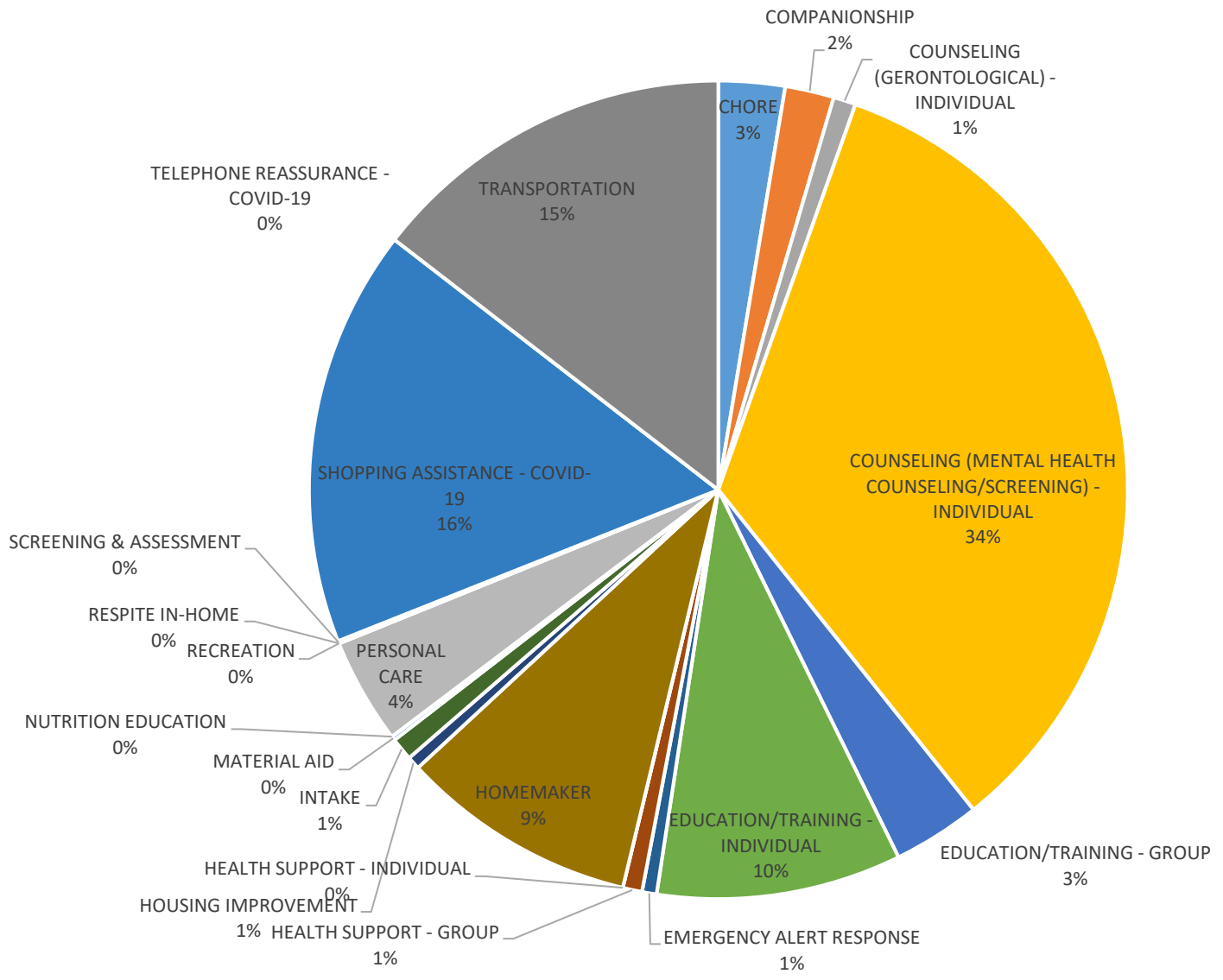
CARES Act

# of Providers	Total Contract
10	\$4,699,655.00

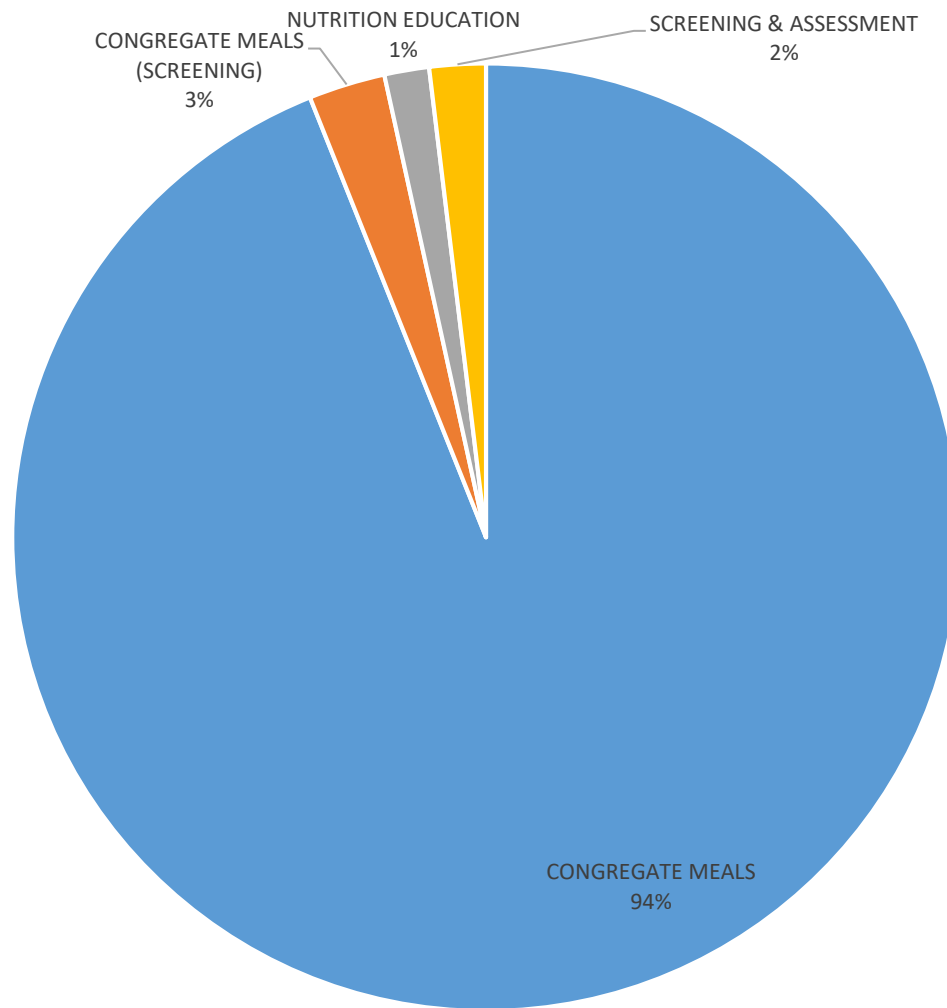
Contract Cycle:	
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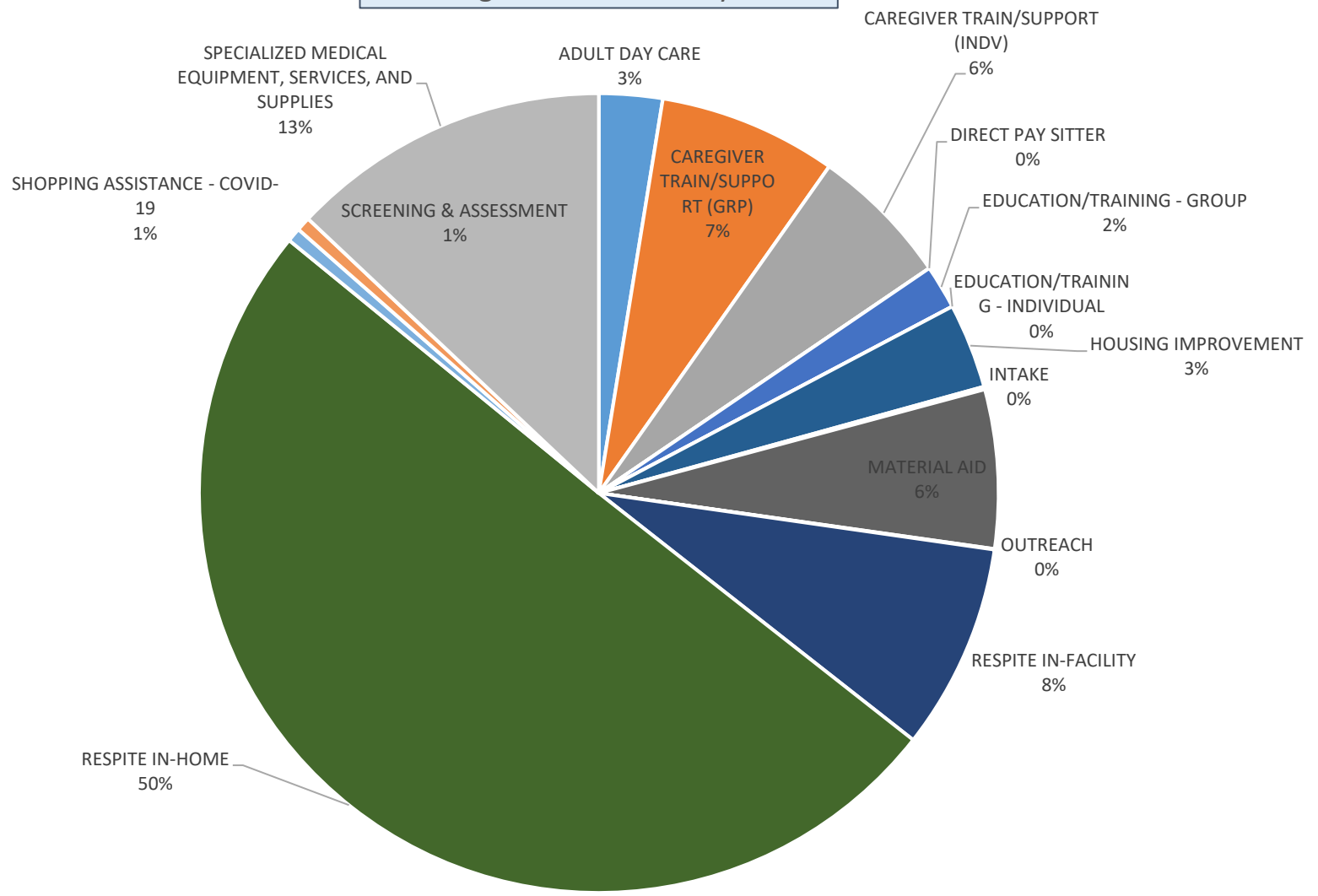
Percentage of CA3B Billed by Service



Percentage of CA3C Billed by Service



Percentage of CA3E Billed by Service



**Emergency Home Energy Assistance Program (EHEAP)**

The Emergency Home Energy Assistance for the Elderly Program (EHEAP) assists low-income households, with at least one person age 60 and older, when the households are experiencing a home energy emergency.

**EHEAP 2019-2020**

# of Providers	Total Contract Amount
7	\$518,140.00

**CARES EHEAP 2020-2021**

# of Providers	Total Contract
7	\$309,967.00

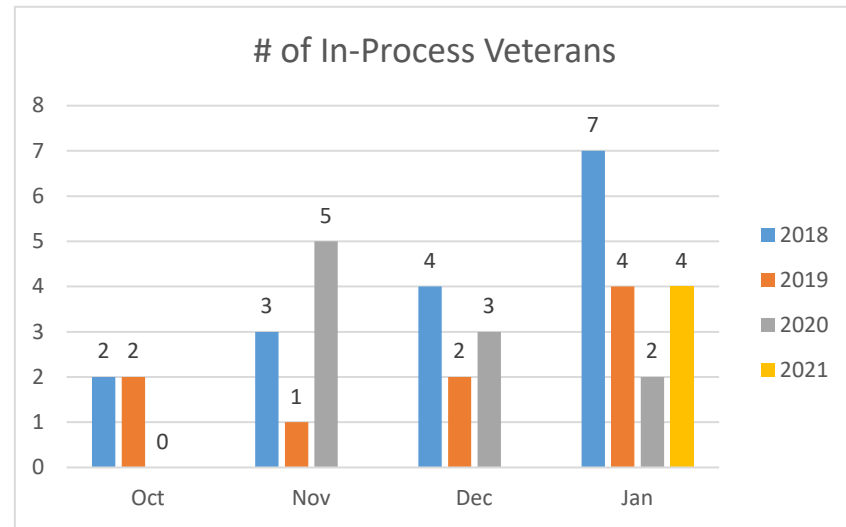
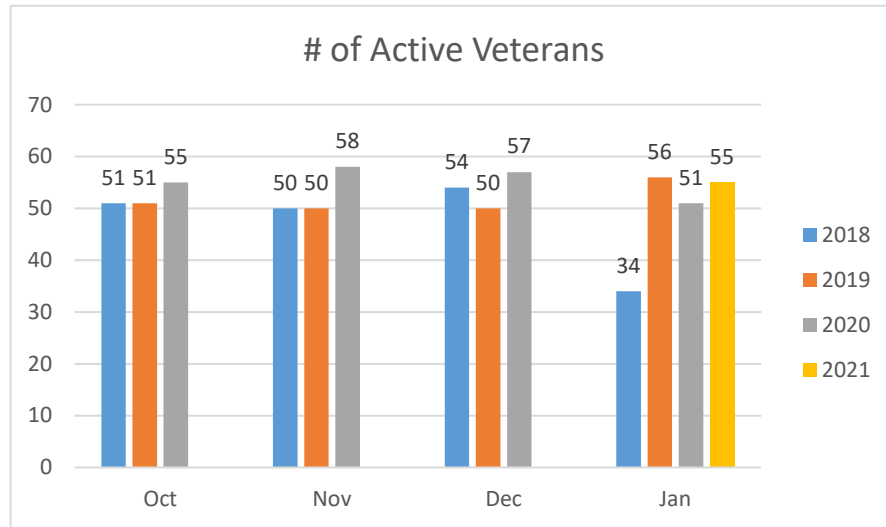
**October 01, 2020 - January 01, 2021**

<b>Provider</b>	<b># of Clients</b>	<b>Amount Billed</b>
Baker County Council on Aging	2	\$ 811.61
Clay Senior Services	32	\$ 14,907.03
City of Jacksonville	263	\$ 89,618.17
Flagler Senior Services	23	\$ 9,699.55
Nassau County Council on Aging	33	\$ 12,901.32
St. Johns County Council on Aging	36	\$ 15,871.81
County of Volusia	12	\$ 5,595.36
<b>Grand Total</b>	<b>401</b>	<b>\$ 149,404.85</b>

### Veterans Directed Care Program

The Veteran's Directed Care Program is a program through the Veterans Administration which allows veterans to remain in their home and direct their own services and supports. Veterans are referred through the VA Offices in Gainesville and in Orlando. "In Process" Veterans represent new Veterans who are added to the Program.

# of VAMC	Year to Date Margin
2	\$170,567.82



### Legal Services

Legal services are funded through Older Americans Act Titles IIIB and IIIES. We currently contract with two providers for these services - Jacksonville Area Legal Aid and Community Legal Services of Mid-Florida.

# of Providers	OAA Set Aside for Legal Services
2	\$320,764.71

Provider	Total Unduplicated Clients 2020
Jacksonville Area Legal Aid	971
Community Legal Services of Mid-Florida	200

CLSMF - Mr. Turner is a 61-year-old Deland resident who had experienced five years of homelessness. He came to CLSMF through our relationship with the West Volusia Hospital Authority (WVHA). He had worked for 35 years at labor jobs, but had not worked for nearly 10 years due to health issues. The lack of consistent employment has caused intermittent homelessness. Mr. Turner had previously applied for Social Security benefits but was denied. CLSMF was able to represent him in reapplying for benefits. Mr. Turner’s multiple health issues made medical records collection a lengthy process, but Mr. Turner stuck with us and we with him. He kept all his appointments, stayed in regular contact with his attorney in our DeLand office. He was able to see physicians using his WVHA Health Card so that we could get a complete medical history, diagnoses and treatment plans that could be added to his Social Security application. Ultimately, we were able to assist him in receiving an award for Social Security including back pay and Medicaid, which enabled him to move from the WVHA Health Card. After those awards, we were able to assist him in securing Section 8 Housing. Our client was grateful to have a home and healthcare for the first time in years! We are grateful for important community partners, like The Neighborhood Center and the WVHA Health Card, to help us secure great results for our clients.

CLSMF - Ms. H. is a 64-year-old disabled woman who came to CLSMF in 2014 with a case that went all the way to the Federal Appellate level. Although she had legitimate health issues which classified her as disabled, she did not know that her physician in Puerto Rico was found to have filed fraudulent evaluations to the Social Security Administration. After moving to Florida in 2011, the SSA pursued Ms. H. for an overpayment of more than \$47,000. There were two issues: the cessation of her benefits and the alleged overpayment. From 2014 to June of 2020, CLSMF fought tirelessly, taking the case to Federal Court where the prior decision was reversed. As a result of the reversal, the retroactive benefits awarded were over \$47,000.



JALA - PROTECTING HOUSING STABILITY (Reverse Mortgage Foreclosure Defense): Jacksonville Area Legal Aid, Inc. (JALA) continued to apply its specialized knowledge and experience in rescuing senior homeowners from losing their homes to foreclosure of reverse mortgages, despite the fact they owe no mortgage payments. These mortgages do not require monthly payments but carry with them traps for the unwary. The homeowners often do not realize they have a problem until a foreclosure judgment is imminent or a foreclosure sale has taken place. In one such case in FY 2020, JALA represented a 68-year-old widower who was in jeopardy of losing his home through a reverse mortgage foreclosure, simply because his wife passed away. Years ago, his wife, who was older than he, had signed a reverse mortgage note. The lender did not get the client's signature on the note because he was not old enough to qualify for a reverse mortgage on his own at the time. When the client's wife passed away, the lender did not recognize the client as having any rights. The lender proceeded to treat the situation as if all the "borrowers" to the reverse mortgage had died, and filed a foreclosure action. JALA filed defenses including the fact that the client was a "borrower" since he did sign the mortgage (just not the note). The lender ultimately agreed to dismiss the case through a "mortgagee optional election" program whereby the client would now be recognized as a "borrower."

JALA - STOPPING/PREVENTING ELDER EXPLOITATION: During the pandemic, Jacksonville Area Legal Aid, Inc. (JALA) was contacted by a 64-year-old man with disabilities who had not received his CARES Act emergency economic impact payment (stimulus check). The client had learned from the IRS that he would not be receiving a stimulus check because his son had claimed him as a dependent on the son's 2019 income tax return. The client had not filed a return himself since 2009 because he is living on Social Security disability benefits. But, he was not being cared for by his son, and he never authorized his son to claim him as a dependent. They actually have little contact due to a strained relationship. The son had forged client's checks and otherwise stolen money from the client in the past, due to a substance abuse problem. JALA researched the issue, and advised the client to file an identity theft affidavit with the IRS, which he did electronically. Two weeks later, the IRS confirmed that a stimulus check was in the works. The client was advised to file a return of his own in 2020 to protect himself from further fraud, in the event further pandemic relief is issued.

**No Wrong Door**

The purpose of this program is for ElderSource to review and assess functions, services and activities for unmet needs and a growing demand for new needs due to COVID-19. These funds are used for targeting and addressing needs due to COVID-19.

# of Providers	Total Contract
N/A	\$262,977.23

Contract Cycle:	
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Project Name	Name and Description of Project or Activity
GetSetUp	64 socially isolated seniors and/or adults with disabilities will be provided 7 months access to the GetSetUp virtual platform for unlimited classes.
Uniper	Seniors have been encouraged to limit interactions outside of their homes to help protect them against COVID. Congregate meal sites, Adult Day Cares and many other locations that were used to promote social interactions and to provide health and wellness programming are closed.
Phone System	During COVID, staff have been working remotely, and will continue to work remotely. Our current system is not cloud based and is using old technology. Connectivity is challenging, impacting client access and staff efficiency. In addition, Having the ability to easily transition calls from one PSA to another is vital to responding to a pandemic such as COVID. With staff working remotely, it is important that this process be cloud based and that
Internet/Mifis	Connectivity has been challenging for some staff while working remotely. In addition, PSA 4 continues to respond to COVID during hurricane season in which a high number of storms have been predicted.
Chat	The Chat functionality would be available during ADRC Helpline hours through the ElderSource website.
Volunteer Database	This grant will pay for the development of a customized database for volunteer programs.

**Florida Blue Foundation Funded - TCARE**

The Tailored Caregiver Assessment and Referral System (TCARE) program is an evidence based program that creates individualized care plans, helping to improve efficiency in the coordination and delivery of critical resources to caregivers. This care management protocol is designed to support family members who are providing care to older adults, especially those with chronic or acute health conditions. By supporting caregivers, older adults will also benefit from resources and supported to remain living independently. In addition to connecting caregivers to available resources such as assistive technology, in-home support, meals, education, adult day care and informal support; the program also assesses the need for mental health services and connects with available community providers. In fact, the assessment itself is a guided counseling session that is a behavioral intervention—not merely a question and answer session. TCARE reduces burnout by identifying the goal, strategy, and resources needed to close the gap between how a caregiver self-identifies and how they clinically measure. A Person Centered Care plan is generated with defined goals and strategies with well-targeted interventions addressing the root causes of burnout, stress and isolation.

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# of Providers	Total Contract
2	\$383,333.00

Contract Cycle:	January 2021 - January 2025
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