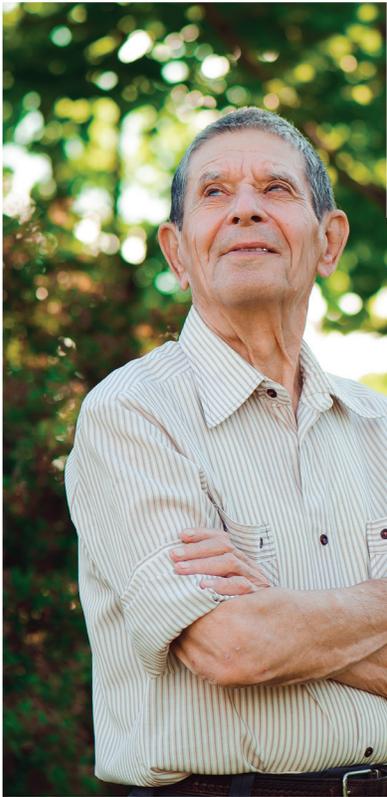




ELDERSOURCE  
**IMPACT REPORT**  
2019



## DEAR FRIENDS, FAMILIES AND COMMUNITY LEADERS:

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This past year ElderSource celebrated the agency's 45 year anniversary. Much of what ElderSource has accomplished could not have been done without a foundation that guided us in our service. Our agency's guiding principles are the foundation and the core of everything we do to connect our clients to trusted and valuable community resources.

It's through our continued efforts and community influence that we demonstrate our guiding principles and the things our agency values most.

As an agency we are diligent in honoring our guiding principles and demonstrating them in our day-to-day service. Our values are reflected through the staff's ability to provide excellent and responsive service when receiving calls on the Helpline, the use of integrity and professional behavior when engaging with seniors at community events and being good stewards to our donors and funders.

As we reflect on the agency's 45th anniversary, we will highlight examples throughout this report on how our core values guided us in providing the continued assistance to our clients throughout the years. Without these core values we would not be able to help clients such as Ms. Garard. She is 90 years old, losing weight and experiencing pain because her dentures are too big making it difficult for her to chew and eat. Through our dental grant with United Way and the ElderSource Senior to Senior program, our agency assisted in replacing Ms. Garard's dentures.

It's in these moments we believe our guiding principles are most exemplified and continue to be the essence of our agency's service. While much has changed in the aging services community during the last 45 years, our values have stayed consistent. We have made our mark, and will continue to make progress, as the leader in Northeast Florida's aging network.

We know we cannot do it alone. Our agency looks for your continued support. It's crucial to know that we have donors, families, community leaders, partners and friends who are also advocating for our seniors and their caregivers.

Please accept our endless gratitude,



*Linda Levin*  
**Linda Levin,**  
CEO



*Stu Gaines*  
**Stu Gaines,**  
Board Chair



# CELEBRATING 45 YEARS OF SERVICE

Advocacy, education and awareness for the senior community

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For 45 years ElderSource has not only provided essential services to seniors and caregivers in Northeast Florida, our agency has also been influential in providing advocacy and education and creating awareness for the aging population. Our hope is to continue this legacy in the coming years as our agency continues to grow and strengthen in future initiatives.

## GUIDING PRINCIPLES

**We value:**

- Those we serve
- Diversity and inclusion
- Excellent and responsive service
- Honesty, integrity, respect 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
- Our role as an instrument of positive change

## MISSION

ElderSource empowers people to live and age with dignity and independence in their homes and their community.

## VISION

Older adults and adults with disabilities are valued and have the resources they need to live and age with dignity and security in an age – and ability – friendly community.

## INCLUSION STATEMENT

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



SHINE volunteers gather for year-end update and holiday celebration.

# WHERE SERVICE BEGINS

## AGING AND DISABILITY RESOURCE CENTER HELPLINE

True service begins with the person in mind. It is the first of our guiding principles and why our tag line is “Start here for help.” Genuine service begins with our Aging and Disability Resource Center (ADRC) Helpline. For many people, the Helpline is the first interaction they have with our agency. From the time someone calls our ADRC Helpline, until the time that call ends, our Customer Service Specialists diligently create the best customer experience. Our employees are dedicated to connecting each client to the resources they need in order to live better lives.

## SHINE – SERVING HEALTH INSURANCE NEEDS OF ELDERS

There are 10,000 people in the United States turning 65 everyday who qualify to receive Medicare. Many of these same seniors often struggle with understanding how and when to enroll in Medicare. Some may even question if their current Medicare plan is best suited for their needs. Understanding Medicare benefits can be challenging.

Serving the Health Insurance Needs of Elders (SHINE) offers free and unbiased counseling to seniors who need guidance in understanding their Medicare benefits or how to begin the enrollment process. Our SHINE volunteers are highly trained and committed to helping seniors get the most out of their benefits.



In 2019, **52 SHINE volunteers** made a significant impact in our community.

Because of SHINE, seniors in our area **saved over \$4,252,000 on Medicare Part D** and **\$2,369,000 from the Medicare Savings Plan (MSP)**

SHINE volunteers reached out **OVER 4,500 TIMES** To connect with individuals seeking free counseling through the SHINE program

**21** New individuals were trained to serve as SHINE volunteers

SHINE volunteers participated in **117 OUTREACHES** including presentations and health fairs in our seven-county service area. That's almost 10 outreaches per month!

The ADRC Helpline staff answered **86,176 CALLS**

**28,620+** People called for information and resources

Top reasons for calling into the ElderSource Helpline: **IN-HOME SERVICES, HOUSING, & FOOD**

**OVER 9,274** seniors and persons with disabilities were screened for services

**1,625** people were screened to determine their eligibility for Medicaid Long-Term Care

*All stats are from 2019.*

# LIVES CHANGED

Through the Senior to Senior program, ElderSource serves many seniors and caregivers experiencing unexpected financial crisis that make their lives extraordinarily difficult. The goal is to help them recover from the crisis and move forward while maintaining their independence and dignity. The Senior to Senior program is a collaborative effort funded by J. Wayne and Delores Barr Weaver Senior to Senior Fund endowed through the Community Foundation of Northeast Florida and supported by an additional grant from The Jim Moran Foundation. Here are some of the amazing stories of individuals who were helped by the program.



## A JOURNEY TO HOME

During Hurricane Dorian, 73-year-old Ms. Woodward fled to a local shelter with her two cats to wait out the storm. Once the storm passed, Ms. Woodward returned to her home only to be shut out by her roommates and the landlord. Without anywhere to go, the Red Cross staff contacted ElderSource and Independent Living Resource Center to help pay for a temporary hotel room. After continued efforts to reach her roommates, Ms. Woodward discovered her roommates had given her spot to a new tenant.

After a failed attempt to rent another room and having her \$400 deposit stolen, Ms. Woodward connected with a friend who allowed her to stay with them for several months, unfortunately without her cats. The cats were taken to the Jacksonville Humane Society for a month until, an ElderSource staff member graciously accepted the cats into her home while Ms. Woodward continued her search for a permanent residence. ElderSource also assisted in finding a storage unit for her belongings.

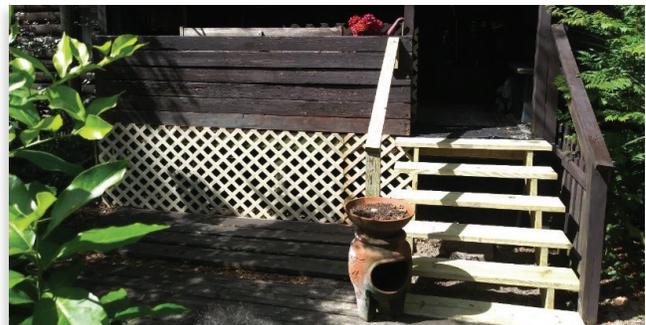
ElderSource staff spent three months diligently following up trying to find Ms. Woodward affordable housing but to no avail. Prior to the hurricane, Ms. Woodward was on a waitlist for subsidized housing. After several months she was finally approved. The Senior to Senior program paid the deposit and first month's rent. Ms. Woodward now has a permanent home and is grateful for the assistance she received, and her cats are back with her.

## ONE STEP AT A TIME

Ms. Smith, who lives alone in a mobile home, experienced dramatic heating and cooling problems with her air conditioning and heating unit. In addition to the broken unit, the stairs to her home were rotten creating an unsafe situation. The heating/cooling unit repair was diagnosed and it was determined a temporary fix was expensive and a replacement even more costly. Ms. Smith barely endured living in her home during the cold winter months. Without the funds to solve either of her maintenance problems, she turned to ElderSource. The Senior to Senior program paid for the repairs to both her ac/heating unit and front porch steps. Ms. Smith is now able to remain living comfortably in her home.



**BEFORE**



**AFTER**

# WORKING TOGETHER TO SUPPORT SENIORS

In order to meet the needs of our aging population in Northeast Florida, ElderSource contracts with 10 partner agencies to deliver services where they are most needed. The Florida Department of Elder Affairs provides funding to ElderSource from the federal Older Americans Act and a multitude of state grants to provide home and community based services throughout our seven county region. These include, but are not limited to home-delivered meals, senior center activities, respite care, in-home services, health and nutrition programs, legal counseling and support.

ElderSource and the following organizations work together to provide vital support and resources to the seniors in Northeast Florida:



## SERVICES PROVIDED

 <p><b>409,450</b> home-delivered meals</p>	 <p><b>575</b> clients attended <b>41</b> health and wellness classes</p>
 <p><b>90,517</b> hours of home making services provided</p>	 <p><b>4,287</b> hours of legal services</p>
 <p><b>42,469</b> hours of personal care administered</p>	 <p><b>1,331</b> clients received legal services from Jacksonville Area Legal Aid and Community Legal Services of Mid-Florida</p>

# COMMUNITY OUTREACH GALLERY

In 2019 ElderSource staff participated in 43 various community outreach events in our seven county service area. These outreaches included health fairs, Senior Expo events, food distributions, general presentations to community clubs and organizations and more. Our staff was able to reach more than 4,400 people as these activities continue to be an important, face-to-face, grassroots effort to connect with older adults and caregivers in the community and create awareness about our services and resources.

## SENIOR EXPO AT PRIME OSBORNE



Each year, ElderSource participates in the Senior Expo in downtown Jacksonville. Over 3,000 people attend seeking a variety of health and community information. It's a great time to connect one-on-one with seniors, especially those who want extra help from a SHINE volunteer.

## SHOWING LOVE

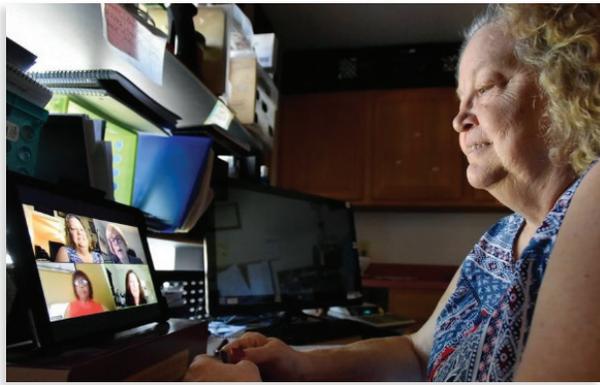


## STEPPING OUT INTO THE COMMUNITY



Health fairs are the most common ways we can network with the seniors we serve. Staff really enjoys engaging them in meaningful conversations. Some of the more popular events ElderSource staff attended include: City of Jacksonville Senior Opioid Summit, the Active Over 50 Expo at the Thrasher Horne Community Center, The Veterans Affairs health event and the Palm Coast community health fair, just to name a few.

ElderSource Board members showed their hearts of compassion this year by adopting a few seniors for Valentine's Day. Gifts were collected and delivered to seniors by staff. Many smiles, hugs and even tears of joy were shared.



# A CULTURE OF CARE

## THE VIRTUAL CAREGIVER SUPPORT GROUP

ElderSource's Virtual Caregiver Support Group, launched in 2019, gives caregivers a safe space to share information and stories, ask questions and voice personal feelings. The primary goal of the group is to provide caregivers with an opportunity to connect with other caregivers using today's technology.

Caregivers are able to join the group through the use of internet-connected smart devices with cameras such as cellphones, laptops, or iPads. The group, consisting of no more than 10, is facilitated by a licensed clinical social worker who guides the discussions which result in sharing of valuable information, stories, laughter and tears.

The group is designed for busy caregivers who may not be able to leave their loved ones alone to attend an in-person support group. The group has created a community of caregivers so no one feels alone on their journey.

"We hope the group helps caregivers feel valued and supported," said Louise Starmann. Louise is the licensed clinical social worker that helps guide the discussion of the group.

Participant Pauline said the caregiver groups have helped her understand the importance of being connected to others who can relate to similar challenges.

"This group is so important to each of us," she said. "We built relationships of caring about the concerns of other members. You empathize because you understand how each member feels. Providing a listening ear goes a long way."

The Virtual Caregiver Support Group is funded from the proceeds of the annual ElderSource fundraising event, *A Night with the Stars*. Caregivers are encouraged to join the group by contacting the ElderSource Helpline for more information.



## DEMENTIA CARE AND CURE INITIATIVE

In collaboration with Florida's 11 Area Agencies on Aging and 17 memory disorder clinics, ElderSource was tapped to chair the Jacksonville task force of the Dementia Care and Cure Initiative (DCCI). The DCCI is a group of community partners working to create a dementia-friendly Jacksonville to increase the quality of life for those affected by the disease. Efforts of the Task Force include hosting workshops to inform community stakeholders of the need and benefits of creating dementia-friendly communities. This effort aligns with the national movement by Dementia Friendly America which strives to build communities across the United States to support people living with dementia and their caregivers.



## CAREGIVER COALITION OF NORTHEAST FLORIDA

Since 2008, the Caregiver Coalition has provided a compassionate network of support and access to critical resources for caregivers and seniors. The Caregiver Coalition is a partnership of leading healthcare, aging, and senior services organizations that serve those caring for others in the Northeast Florida region. In 2019, ElderSource signed on as the Coalition's fiscal agent and hired a new staff member to lead Coalition activities.



(L-R) ElderSource CEO, Linda Levin and 2019 Delores Barr Weaver Elder Advocate Award Winners: Eileen Rodden, Community Education Director at Women's Center of Jacksonville; Judge Gary Flowers, and Senator Audrey Gibson.

## 2019 EXTRA SPECIAL, SPECIAL EVENTS!

Our special events throughout the year help us connect with our community friends, while providing an active way for donors to engage in our agency's mission and build new meaningful relationships.

### A NIGHT WITH THE STARS

*A Night with the Stars* is ElderSource's annual fundraising event honoring both advocates and professional caregivers in the community. Over 40 professional caregivers were nominated and 11 individuals were thrilled to be named the 2019 Luminary Award winners.

The event featured the presentation of the 2019 Delores Barr Weaver Elder Advocate Award to: Judge Gary Flower, Senator Audrey Gibson and Eileen Rodden, Community Education Director at the Women's Center of Jacksonville. Together they advocated for the creation of Elder Abuse Fatality Review Teams.

*A Night with the Stars* raised over \$30,000, which will be used to support services for seniors and family caregivers.



### CELEBRITY SERVER

Celebrity server was a competitive fundraising event that brought together local CEO's and community leaders for friendly competition to help benefit ElderSource. For one night our celebrity servers came together at Whiskey Jax Beaches to serve up dinner and drinks to their families and friends. The event raised over \$12,000.

Featured celebrity servers included (L-R): Bob Grant, Guidewell & Florida Blue; John Miller, Swisher International; Laura Williams, Wells Fargo; Jack Leone, Cornelius, Schou and Leone; Jackie Smith, Congressman John Rutherford and Jim Stuck, Beaches Council on Aging. Not pictured: Doug Baer, Brooks Rehabilitation; Senator Audrey Gibson; Michael Macke, Petros Advisory Services; Liz Morgan, Liz Morgan PR.



### WORLD ELDER ABUSE AWARENESS DAY

ElderSource and St. Johns County Council on Aging teamed up to host an educational event to learn more about how not to become a victim of elder abuse or financial scams. The event is designed to empower seniors and caregivers to be confident and informed if they are ever faced with elder abuse or financial scams.

Guest speakers included (L-R): Ken Amaro, First Coast News Consumer Advocate; Alicia Somers, Financial Wellness Manager, Regions Bank; Becky Yanni, Executive Director, St. Johns County Council on Aging and Octavious Holiday, Division Chief Human Rights Section, State Attorney's Office.

# ON THE RIGHT PATH

## STRATEGIC PLAN OVERVIEW

In 2018, ElderSource staff and Board members created a comprehensive strategic plan that mapped a course for agency growth and direction over the next three years. The following goals were established and some significant results were achieved in Year-One of the plan.

### GOAL: Continue High Quality Core Services

The objective of this goal is to be good stewards of the financial resources bestowed on us by state, federal agencies and foundations and donors; offer more direct assistance for older adults and adults with disabilities; and continue our commitment to LGBTQ older adults.

#### 2019 Results:

- Trained staff and provider agencies on how to monitor funds to ensure accurate tracking and recording; and developed a new system to track spending surpluses and deficits.
- Created a staff position to administer the contract work in our southern counties and support the veterans care program.
- Collaborated with partner agencies on outreach initiatives; created the Senior Advocacy Coalition bringing together community organizations to advance aging issues; led the local work of the Dementia Care and Cure Initiative; agreed to serve as sponsor for the Caregiver Coalition of Northeast Florida; and along with two provider agencies was selected for the Medicare Advantage Learning Collaborative.

### GOAL: Improve Quality of Life and Reduce Isolation of Seniors and Caregivers

The focus of this goal is to improve care and resources for older adults and the caregivers who support them.

#### 2019 Results

- Convened providers and community partners through the DCCI task force, Caregiver Coalition, Senior Roundtable, Senior Advocacy Coalition
- Launched Virtual Caregiver Support Group
- Developed and launched Caring Connections Telephone Reassurance Program

### GOAL: Explore Innovative, Net Income Generating Service Lines

The purpose of this goal is to generate additional funding to invest in mission-aligned services.

#### 2019 Results

- Agency efforts in 2019 produced a 12% increase of combined net income over the previous year.

### GOAL: Increase Awareness of ElderSource

The purpose of this goal is to elevate the agency's presence with key audiences so more people are aware of how to access information and services.

#### 2019 Results

- Enlisted the expertise of a public relations firm to develop key messages and generate media attention.

### GOAL: Advocate for Older Adults and Adults with Disabilities

The objective of this goal is to expand the agency's efforts to support the needs of seniors and persons with disabilities.

#### 2019 Results

- Creation of the Senior Advocacy Coalition made up of aging services providers and other agencies who would learn about each other's priorities and begin to examine opportunities to collaborate on legislative initiatives.

### GOAL: Advance ElderSource Operations

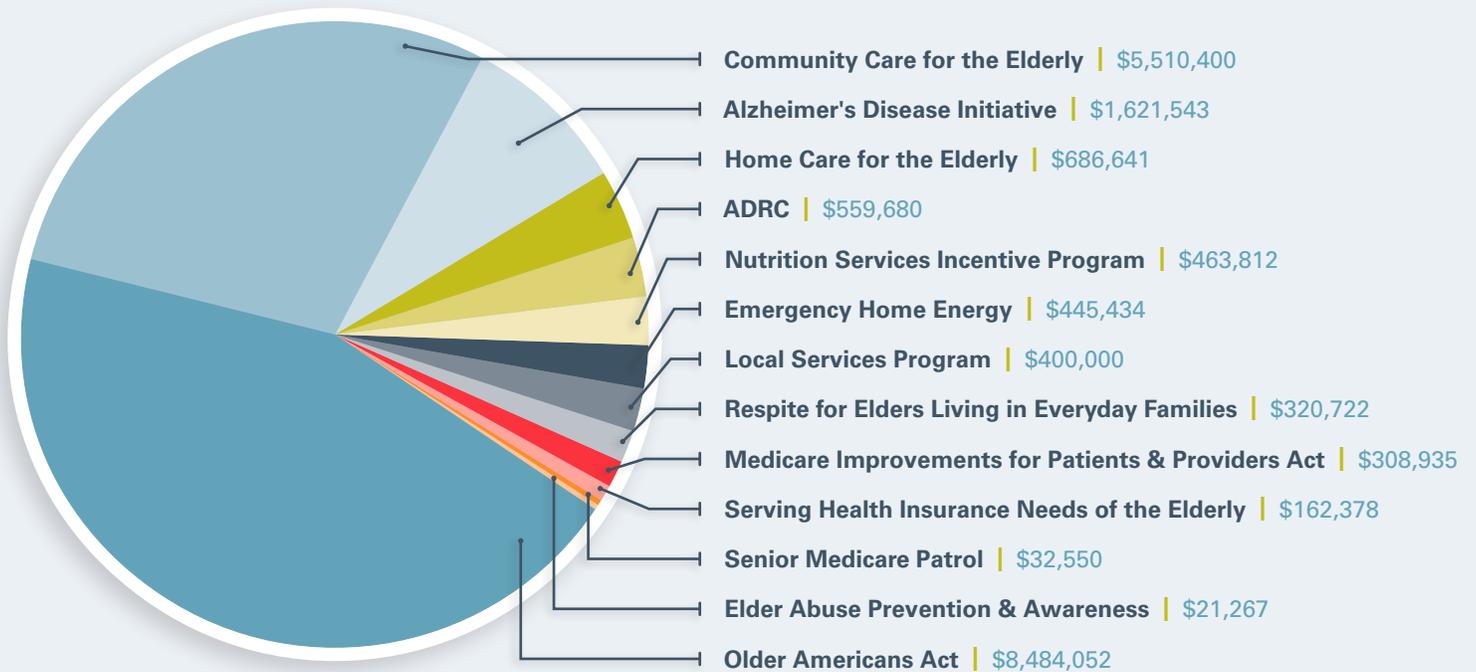
This area of focus concentrates on creating an inclusive workplace culture, the development of "green governance" policies and explore facility investment opportunities.

#### 2019 Results

- Created the Employee Resource Group, green governance policies and procedures.
- Installed LED lighting, accessibility buttons on entrances, and water displacement dams.
- Surveyed staff about diversity and inclusion and added staff.

# STATE & FEDERAL FUNDING

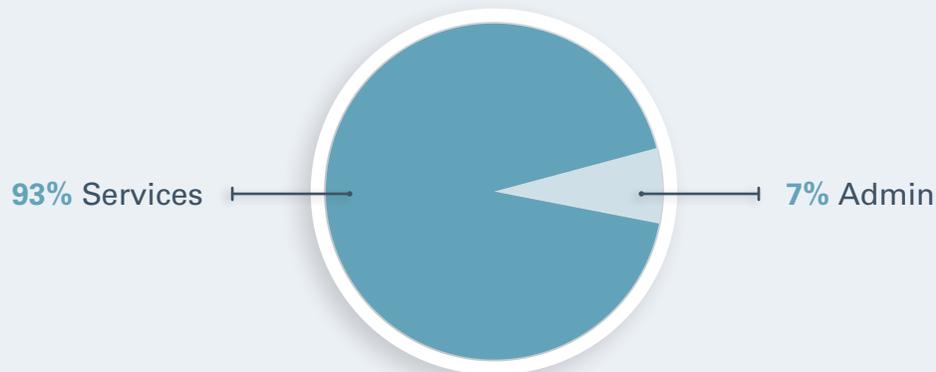
\$19,017,414



## OTHER FUNDING

Crisis Funding	\$195,000
United Way Meals	\$100,000
Benefits Enrollment Center	\$70,000
Veterans Directed Care	\$1,820,172
United Way Dental	\$25,000
<b>Total</b>	<b>\$2,210,172</b>

## FUNDING DISTRIBUTION FOR ADMINISTRATION TO SERVICES





## WE ARE GRATEFUL FOR OUR SUPPORTERS AND SPONSORS:



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