

2020 IMPACT REPORT



Dear Friends, Families and Community Leaders:

Unprecedented. Unbelievable. Epic. Unforgettable. Many words have been used to describe 2020. It was certainly a year no one could have predicted. With the global pandemic, racial injustices and deep division in our society, there could not have been a better time for us to inspire unity. One thing became evident in 2020: we are all better together. It was a year where our relationships with our partner agencies and other community organizations were especially vital because the work needed to support older adults and caregivers could not have been done alone.

ElderSource had to be innovative and collaborative in order to meet the needs of the older adults and caregivers deeply impacted by the pandemic. Significant funding from the Families First CARES Act, the First Coast Relief Fund and other generous contributions from corporate partners, enabled us to provide thousands of seniors with rent and utility assistance, income replacement, home delivered meals and additional food and bags of supplies. We worked to tackle the social isolation and loneliness seniors were experiencing by providing routine phone calls through our Caring Connections Telephone Reassurance program. Caregivers were connected to other caregivers through the Virtual Caregiver Support Group and a variety of virtual workshops and resources offered by the Caregiver Coalition of Northeast Florida. So much was accomplished and so many lives were positively affected because we were in this together.

In addition to focusing on our clients, it was equally important to ensure our staff felt cared for. Their mental and physical well-being was a priority, and staff activities and communications efforts were amped up to help them feel safe, connected and supported while they worked remotely. We're proud to say they didn't miss a beat in meeting and exceeding work responsibilities.

While 2020 was indeed epic, the opportunities it created underscore the purpose of our mission. As we look ahead in 2021 and beyond, ElderSource's staff, Board, Advisory Council and volunteers will continue seeking and seizing opportunities to make our organization and our community better.

Sincerely,



Linda Levin
Linda Levin,
CEO



Elizabeth Gunn
Elizabeth Gunn,
Board Chair

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.

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

2020 HIGHLIGHTS

AGING AND DISABILITY RESOURCE CENTER HELPLINE

ElderSource's main responsibility has always been to identify the needs of older adults and their caregivers and to develop a plan to help meet their needs. The ElderSource Helpline is essential in helping make this happen.

ElderSource's Aging and Disability Resource Center Helpline is the starting point for older adults, adults with disabilities and caregivers. During the pandemic, our Helpline saw an increase in the number of calls, answering more than 7,000 calls a month compared to 6,000 before the pandemic. Customer Service Specialists were diligent in listening to callers and connecting them to the resources they needed most.

4.28%
increase in **monthly Helpline call volume** during the pandemic

88,000+
calls the **ElderSource Helpline** answered

9,523
seniors screened for services in 2020

36,000
seniors who called for **information and resources**

FOOD AND SUPPLY DELIVERIES

During the pandemic ElderSource collaborated with various community partners to provide meals and supplies to seniors in need.

12,081 bags of food were delivered through collaborations with agencies including Farm Share, Feeding Northeast Florida, Seniors on a Mission and Elite Transportation

890,619 home delivered meals were distributed.
524,434 of those were congregate meals that went home with clients as centers were closed.

150
meals delivered to seniors through a **\$14,000 grant** from Florida Blue to fund UNF's Meals on Wings program

1,850
meals provided to seniors in collaborations with provider agencies and various restaurants

VOLUNTEERS WHO SHINE

SHINE – Serving the Health Insurance Needs of Elders is a valuable resource to seniors turning 65 and looking to apply for Medicare services. Seniors often find themselves challenged in understanding the complexities of Medicare. SHINE volunteers help guide them through the process by providing free and unbiased counseling.

The SHINE program was able to provide assistance to a 71-year-old man who was on medication costing him more than \$12,000 for 60 tablets. With the assistance of a SHINE counselor, the client applied for Extra Help and now pays \$9 a year for his medication.

"I'd like to say that what you do for people like me is really exceptional and I hope you feel appreciated. I appreciate you immensely." – SHINE Client

3,654
contacts to individuals seeking free, unbiased Medicare counseling

\$3 million
amount area seniors **saved on Medicare Part D**

\$2.1 million
amount seniors **saved on Medicare Savings Plan**



PHONE CALLS AND A VIRTUAL SAFE SPACE

The Caring Connections Telephone Reassurance program officially launched in 2019, has continued to grow and help seniors fight against loneliness and social isolation. Volunteers provide regular phone calls to seniors keeping them connected to their community.

31 volunteers
34 participants

THE VIRTUAL CAREGIVER SUPPORT GROUP: The Virtual Caregiver Support Group continues to be a beneficial tool to support and connect caregivers. Through virtual connections, caregivers are able to receive feedback and encouragement from their peers. Having a safe space to connect during the pandemic was meaningful to many participants of the group.

"Since joining this group I have been informed about valuable issues of caregiving. The group of people I meet with regularly are a delight to fellowship with. I feel welcomed and I am always encouraged to participate in the discussions. I have truly enjoyed my time with this group. Louise Starman is a wonderful host, filled with compassion and empathy for others."

– a Virtual Caregiver Support Group participant



Adapting, Innovating in 2020

Finding New Ways to Serve Seniors and Others

Unity

Although physically apart while still working together, the ElderSource Leadership Team devised creative and meaningful ways for employees to stay connected and engaged during the pandemic. The activities were intentional and thoughtful as individuals' emotions and relationships were overwrought due to the state of affairs.

The goal was to unify and support staff using weekly meetings, after hours "hang-outs" on Zoom and occasional socially-distanced events held in the office parking lot. The mental and physical well-being of our employees was a priority given the nature of the work being done to support others who were struggling.

These internal communications efforts thoroughly aligned with the agency's commitment to diversity, equity and inclusion – supporting the community as well as supporting our own staff members.

Workplace Culture

As part of our 2019 strategic planning process, a diverse group comprising staff, board members and Advisory Council members developed and adopted an inclusion statement that sparked additional efforts to build a diverse, equitable and inclusive workplace.

Following 2020's summer of social unrest, conversations about diversity, equity and inclusion (DEI) became a higher priority at ElderSource. Group discussions held during regularly scheduled weekly meetings gave employees a safe place to share and express their thoughts on various events, and several virtual DEI trainings were presented for staff and board members.



ElderSource staff members promote the "Share the Love Challenge" they created to inspire and uplift.



The 2020 Employees of the year. The members of the Employee Resource group.

Not only was it important to demonstrate to staff our agency's commitment to DEI, but the ElderSource Leadership Team believed it was important to make a public statement expressing our sadness about acts of racism. A letter detailing our stance on DEI was distributed to community leaders and partner organizations, and ultimately published in the local newspaper.

The ElderSource Employee Resource Group (ERG), established in 2019, played a notable role in keeping staff engaged and connected. The staff-led group presented information on myriad of topics and became a crucial space to not only learn and engage, but to share thoughts, ideas and emotions during sensitive times. Topics presented during the year included racial injustices, embracing LGBT culture in the workplace, mental wellness and health, gratitude, leadership skills and more.

Sharing the Love

Concerned by the disturbing and divisive events in the community, ElderSource employees created a campaign that provided an opportunity for sharing hope and encouragement.

Through the workplace culture of family, friendship and caring, employees were able to uplift and provide support to one another. Inspired by the outpouring of love, unity and respect for each other, employees created the *Share the Love Challenge*.

The campaign encouraged people to exchange kindness in the form of words, gestures and deeds. A group of employees honed the message, designed a logo, created a video and developed a plan to spread the positive message throughout the community.



Innovative

The year presented many opportunities for staff to be creative and innovative. Grassroots, “boots-on-the-ground” efforts made it possible for seniors to get hot meals and much-needed supplies. New technology and online avenues powered many unique connections. What initially appeared to be obstacles, paved the way for new ideas and new ways to advance our mission.

Door-to-Door

ElderSource recently received generous grants from several sources including \$200,000 from the First Coast Relief Fund, \$100,000 from The Jim Moran Foundation and additional grants from Humana, Florida Blue, and \$5,000 from the United Way of Flagler Volusia. With these grants and relief funding from the Family First Act and the CARES Act, thousands of area seniors were supported during this stressful time. ElderSource dispensed more than \$165,000 for rent, utilities, lost income and food. Between March 1 and December 31 in 2020, our partner agencies delivered 890,619 meals – a 208 percent increase in the number of home-delivered and congregate meals provided to seniors in our service area since Jan. 1. These partner agencies fed more seniors by contracting with area restaurants to prepare meals – a win-win for both. The nonprofit community partners Elite Transportation and Seniors on a Mission purchased and delivered more than 10,000 bags of food and supplies from Farm Share that ElderSource staff bagged weekly and delivered to seniors’ front doors.

Tech Talk

ElderSource introduced new tools that helped older adults and caregivers connect to family and friends as well as a variety of fun and educational activities.

U.Connected is a simple attachment to a television and a special remote control that gives people opportunities to easily participate in fun activities, talk with family and friends, or join interactive health and wellness programs. The pilot program supplied 250 free units to seniors with additional funding underway to expand the program in 2022.

The GetSetUp platform offers classes presented in real-time, live lectures, and encourages interaction among participants and instructors. GetSetUp guides, who are older adults and retired educators, help participants learn by doing and encourage discussion and questions during the class. The response to this program has been tremendous, and free classes will continued to be offered in 2022.

ElderSource and AARP Florida collaborated to present “Let’s Do Lunch,” a live, monthly 30-minute program on Facebook featuring entertaining and educational topics for seniors and caregivers. Launched in August 2020, the program is hosted by ElderSource CEO Linda Levin and Justine Conley of AARP Florida. Topics presented included the 2020 Census, voting, yoga, creating art to experience joy, holiday cooking with an Italian twist and facts and myths about the COVID-19 vaccines, just to name a few.



Caring for the Caregiver

The rigors of caregiving were certainly amplified during the pandemic. The Caregiver Coalition of Northeast Florida proved to be a vital resource for First Coast residents seeking to take better care of themselves and a chronically ill, disable or aging loved one. The Coalition – a compassionate network of leading healthcare, aging and senior services organizations, which ElderSource is leading – offered monthly virtual workshops on myriad topics. More than 600 people signed up to take advantage of the information and resources offered by subject matter experts.

Success Spotlight: The Senior to Senior Fund

The ElderSource The Senior to Senior Fund, a program funded by the J. Wayne & Delores Barr Weaver Senior to Senior Endowment at The Community Foundation for Northeast Florida and supplemented by a grant from The Jim Moran Foundation, provided assistance to seniors dealing with short term financial crises related to health, housing, utility and transportation. The Senior to Senior Fund was a lifeline for **294 seniors** who received financial assistance last year with **\$230,000** paid to cover rent, utilities, loss of income and food. Here are stories about two older adults we helped through crises last year.



Unexpected Life Saver

Mrs. Lackey and her husband did well for themselves. Even though things were tight financially, they were making ends meet. Her husband's health was on a slow, unexpected decline over several months before he passed away. Upon his death, Mrs. Lackey discovered he had not paid several of their bills including rent and utilities.

"I was shocked when I realized he hadn't been keeping up with the bills," she said. "I started getting all these late notices in the mail and was overwhelmed."

To complicate matters, she was locked out of her husband's online banking accounts and unable to take care of necessary business. Discovering this news, while also dealing with her own disabilities, Mrs. Lackey went into a state of panic. Through the United Way 211 referral system, Mrs. Lackey connected with ElderSource for assistance. The Senior to Senior Fund paid to have her electricity restored and her rent paid.

"I had no idea what I was going to do," she said. "I'm thankful ElderSource helped pull me out of the fire. If it wasn't for ElderSource, I would've been out on the streets. You helped me to get a break in between so that I could catch things up and get back on my feet. ElderSource is a real life saver ... and it felt good to still be treated with kindness."



An Accessible Dream

Ms. Brown is 84 years old and lives with Phyllis, her daughter and caregiver. Ms. Brown has Alzheimer's Disease and struggles with limited mobility due to missing cartilage in her knees. This causes her a great deal of pain and instability when she walks. Unable to safely balance and walk on her own, she often uses a wheelchair to get around. While Phyllis has done her best to make things accessible for her mother while working from home, she was still worried about her mother's safety.

Ms. Brown has experienced several falls around the home. Transporting her to doctor appointments outside of the home had become

treacherous. Her home was not wheelchair accessible, and using the stairs to its entrance became a daunting and dangerous task.

"I would have to rely on neighbors to help me get her down the stairs and into my car for doctor appointments," she said. When neighbors were not around, Phyllis would struggle by herself to move her mother safely into the car.

Phyllis and her mother lived in their home for many years as it underwent several renovations and repairs; many of those repairs are still in progress. They are still repairing damages from Hurricane Irma. With their budget stretched, they were not able to afford the additional costs of a wheelchair ramp.

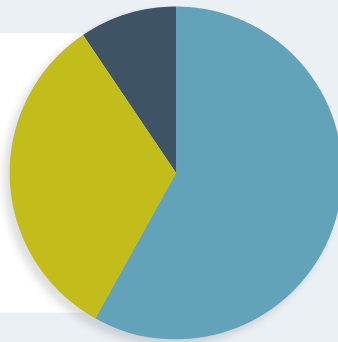
Reaching out to ElderSource for help, Phyllis received financial assistance from the Senior to Senior Fund in order to have a ramp built. Although the construction was delayed due to the pandemic, Phyllis remained in good spirits. The new ramp provides Phyllis with the ability to safely transport her mother in and out of the home.

"I knew that the pandemic would delay things, but I remained hopeful," she said. "Throughout the whole process, everyone at ElderSource has been kind and patient. Even the contractors were courteous and professional. This ramp is a dream. I'm able to back my car up to the end of the ramp and safely load my mom into the car."

ElderSource Budget 2020

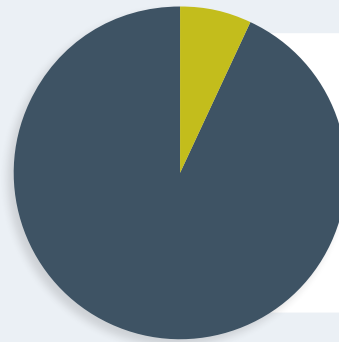
Total Funding

■	\$16,969,377.58 Federal
■	\$9,439,049.33 State
■	\$9,439,049.33 Other



Administration

■	93% Services
■	7% Admin



STATE & FEDERAL FUNDING

Aging and Disability Resource Center	\$421,062.00
Alzheimer's Disease Initiative	\$1,729,280.00
Community Care for the Elderly	\$5,510,884.00
Home Care for the Elderly	\$746,823.00
Local Services Program	\$696,000.00
Respite for Elders Living in Everyday Families	\$335,000.00
Older Americans Act	\$8,872,694.90
Serving Health Insurance Needs of Elders	\$162,378.00
Senior Medicare Patrol	\$47,141.50
Elder Abuse Prevention & Awareness	\$21,267.00
Nutrition Services Incentive Program	\$463,812.00
Emergency Home Energy	\$392,917.00
Medicare Improvements for Patients & Providers Act	\$306,456.00
Medicaid Waiver Specialist	\$137,639.00
TOTAL	\$19,843,354.40

COVID-19 PANDEMIC STATE & FEDERAL FUNDING

CARES OAA	\$5,009,622.00
First Families Act	\$1,555,450.00
TOTAL	\$6,565,072.00

COVID-19 PANDEMIC - OTHER FUNDING

United Way First Coast Relief Funds	\$165,475.00
The Jim Moran Foundation	\$100,000.00
Humana Grant	\$4,000.00
Florida Blue - Meals on Wings	\$10,800.00
United Way of Flagler Volusia	\$5,000.00
Centene	\$1,500.00
Wells Fargo	\$3,000.00
The NonProfit Center	\$3,600.00
LINKS	\$1,000.00
TOTAL	\$293,375.00

OTHER FUNDING

Crisis Funding	\$195,000.00
United Way	\$10,000.00
Benefits Enrollment Center	\$52,500.00
Veterans Directed Care	\$2,155,423.64
TOTAL	\$2,412,923.64

Total State and Federal	\$26,408,426.40
Total Other Funding	\$2,706,298.64
GRAND TOTAL	\$29,114,725.04

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Thank You to All Our Supporters



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