Lifespan provides information, guidance and more than thirty services to help older adults and caregivers take on longer life.

We are inspired by the older adults and caregivers that we serve.
Some days — thanks to the Internet — doesn’t it feel like there is just too much information to absorb? At Lifespan, our main product is information — but we combine information with expert guidance — which makes for a more powerful, much more person-centered approach. Armed with the combination of information and expert guidance, older adults and caregivers can make better choices as these comments from three clients attest.

“My parents were confused and anxious about their health insurance options. Your advice saved them more than $1000 a year!”

“When my mother wasn’t able to live safely at home anymore, I didn’t know where to turn. My doctor suggested I call you. My family and I could never have gone through this without you.”

“It is most reassuring to know that there are people who understand the dilemmas some seniors face; and the guidance offered to help solve them is of much comfort and aid.”

It’s also true that while we provide the information, our clients, fellow staff and board members provide our inspiration. In the following pages, several staff members write about caregivers and elders in whom they find inspiration, I profile board members who have given a combined 37 years of time and energy to Lifespan, and we write about the staff member who is receiving our annual WOW! award.

Warmly,

Ann Marie Cook
President/CEO
Kay, the dancer, and my inspiration

By Sandy Schencke, B.S.W.
Eldersource Care Manager

At 93-years-old Kay is a whirlwind. She’s still very independent and still is an avid ballroom dancer! Last year, at 92, she went on an Alaskan cruise! She doesn’t drive, but even on the coldest days in the winter you can see her at the bus stop waiting for the bus to take her to the store or run errands. In nice weather, and sometimes not-so-nice weather, Kay will often walk wherever she needs to go. She does her own housekeeping and cooking. During my last visit with her, she was looking forward to taking a microwave cooking class. When we met with her, she set the table like we were royalty with matching tea cups and plates. Her attitude is inspiring. She is always positive and enjoys living to the fullest. She even has two sisters still living and one is older. A visit with Kay is so very uplifting, and I often think, “If that is what old age is, where do I sign up?” If you met her, you would also be inspired. Thanks for the opportunity to let me tell you about her.

I’m inspired by this father’s dedication to caring for his daughter

By Melissa Conroy
Aging Persons with Developmental Disabilities Program

I have had the pleasure of providing service coordination for Donna who is in her 50s, profoundly retarded and has a seizure disorder. Her stepfather is her primary caregiver, and the title “stepfather” does not come close to describing what a wonderful father he is. Donna was a teenager when Dick married her mother, who unfortunately passed away five years ago. Since then, both their lives have changed drastically. Though his own age is becoming a challenge, Dick takes care of all of Donna’s personal care needs, as she is unable to walk, bathe or toilet independently. Donna also has significant health problems, which require much attention and numerous medical appointments. But, with the support of five day-a-week aide service, Donna is able to remain living in the family home. Even with all the challenges of caring for her day-to-day needs, Dick still makes time to take Donna to church and out for dinner or to family get-togethers. It is absolutely amazing to see a caregiver show so much love and dedication to providing a wonderful quality of life for his daughter.
Inspiring work by Deb Frink
Lifespan’s 2009 Staff WOW! Award Winner

By Marie Frey
Director of the Ombudsman Program

When I think of the number of times Ombudsmen change the lives of individuals living in long-term care housing, I become very emotional. This past year I learned a very necessary lesson from one of my staff members — that determination, persistency and perseverance have a wonderful payoff. Debi Frink, one of the Assistance Coordinators for the Ombudsman Program, worked diligently to ensure that one resident received necessary medical care and access to his finances. Perhaps someone else may have thrown-up his/her hands due to the complexity of the case. Not Debi. Her heart told her differently.

I witnessed how one women would not take no for an answer. It was as if she was a football player knocking down anyone who would not listen, persevering until she found that one person who saw exactly what was happening and had the ability to correct it.

I am amazed at the number of times Lifespan’s programs interconnect with each other. The knowledge the staff of Lifespan possesses and the desire “to make it right” for our clients is a quality I respect. Deb is an inspiration to me and a gift to the residents on whose behalf she advocates as an Ombudsman.

The Situation

Due to a very complex legal document, the resident was not receiving medical care and medications, nor was he able to purchase personal items. The document stipulated that the resident’s needs first be discussed with the person holding power of attorney, and this person denied anything that incurred an expense. Doctors refused to care for the resident based on the legal document. The facility was uncertain how to handle the situation and contacted the Ombudsman Program. Deb’s perseverance over four months involved legal experts, the facility, a bank trust officer and Lifespan’s Elder Abuse Prevention Program. Ultimately, Deb was able to prove that the resident was indeed capable of making his own decisions without needing the approval of the person holding the power of attorney.
When the challenges of managing a non-profit organization in today’s fiscal environment seem, at times, overwhelming, I think about the elders who need our help, Lifespan’s hardworking staff and the amazing dedication of the members of Lifespan’s Board of Directors. This year, three Board members who have given a combined 37 years of service to Lifespan, Dr. Rocco Vivenzio, Diane Quinlisk and Jane Shukitis, are cycling off the Board.

Dr. Rocco Vivenzio is a geriatrician at the University of Rochester Medical Center and a tireless advocate for his patients and for all elders. He brought wisdom and guidance to our Special Review Committee and the Eldersource Joint Venture Advisory Committee.

Diane Quinlisk, Director of Marketing at Catalyst Inc., brought a wellspring of enthusiasm and passion, as well as her experience in marketing, to Lifespan’s Board of Directors and associated committees including marketing, business development and fundraising.

Jane Shukitis, Vice President of Home and Community Based Services at Unity, freely shared her expertise and knowledge about the field of aging and long-term care services at Board meetings.

Board of Directors 2009 - 2010

Officers & Executive Committee
Chris Perna – Chair
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Major Accomplishments

National Award for Future Care Planning Services
Future Care Planning Services’ won the 2009 National Alliance for Caregiving/MetLife Award for Innovation, Responsiveness and Effectiveness in the Aging and Disability category. Its mission is to help aging caregivers develop written health, housing, legal, financial and guardianship plans pertaining to the future care of their loved ones with disabilities.

Boomers as Mentors Initiative Launched
Working in partnership with the Rochester Area Community Foundation and Rochester Mentors, Lifespan became home to the Boomer Mentors initiative. The goal of the Boomer Mentors project is to tap the knowledge and experience of at least 200 members of this generation to help improve the Rochester City School District’s graduation rate.

Grant Allows for Easier Access to Transportation
A grant from the Greater Rochester Health Foundation is enabling a partnership of Lifespan, Eldersource”, Catholic Family Center and Medical Motor Services of Rochester & Monroe County to provide easier access to transportation. Instead of simply offering a list of providers, a mobility specialist in Eldersource is now able to arrange transportation for older adults using the resources of both volunteer and paid transportation providers.

WRAP
Weatherization Program Now at Lifespan
Lifespan now operates WRAP, the Weatherization, Referral and Packaging program formerly operated by Monroe County. WRAP helps eligible low-income older adults with weatherization and energy conservation solutions.

Fall Prevention Initiative Started
The Rochester Primary Care Network and Catherine Carlson provided funding to build the Rochester Falls Prevention Collaborative between Home Care of Rochester (HCR), Falls Specialist, Dr. Betty Perkins-Carpenter, and gerontology researcher and epidemiologist, Thomas Richardson, PhD, MBA, PA, to reduce the frequency and severity of falls among older adults attending Lifespan’s active senior center in downtown Rochester.

Staff Degrees, Awards & Honors
Art Mason, Director of Lifespan’s Elder Abuse Prevention Program, received the Rochester Business Journal/United Way Community Champion Award and recognition from the National Committee for the Prevention of Elder Abuse (NCPEA) both in October 2009.

Jennifer Helmbold, Director of Lifespan’s Aging Persons with Disabilities Program, earned her MPA.

Maureen Murphy, Director of the Consumer Fraud Prevention program, became a Certified Fraud Examiner and a Certified Volunteer Administrator.

Mary Beth Gueldner, Director of RSVP, also earned her credential as a Certified Volunteer Administrator.

Kelly Zunner Daniels of Lifespan’s Geriatric Addictions program became a Licensed M.S.W.
**Foundation/Corporate/Government Support for Programs**

- B. Thomas Golisano Foundation
- Healthcare Coordinator
- Rochester Area Community Foundation
- Financial Management
- Greater Rochester Health Foundation
- Various Programs
- John F. Wegman Fund
- Financial Management
- Women’s Club of Pittsford
- CheckIt
- MedAmerica Insurance Co. of NY
- Elder Abuse Prevention
- Enterprise Car Rental
- Give-a-Lift
- Chester & Dorris Carlson Foundation
- Falls Prevention
- Rochester Area Community Foundation
- Boomer Mentors
- New York State Bar Association
- Elder Abuse Summit
- Rochester Primary Care Network
- Falls Prevention
- Federal Communications Commission
- Digital Television Conversion for Older Adults
- NYS Legislature
- Give-a-Lift & Partners in Caring

**New Government Contracts**

- Monroe County
  - WRAP (Weatherization)
- Monroe County
  - Matter of Balance (Falls Prevention)
- New York State
  - Senior Community Service Employment Program
  - Town of Greece
    - Home-Safe-Home
  - Town of Irondequoit
    - Home-Safe-Home

**Special Thanks To**

- John DiMarco
  for his very generous support of Lifespan.
- Catherine Carlson
  for her charitable contributions to Lifespan’s programs.
- Monroe County’s State Legislative Delegation
  - Assembly
  - David Gantt
  - Joseph Alesi
  - Susan John
  - David Koon
  - Joseph Errigo
  - State Senate
  - Joseph Robach
  - James Alesi
  - George Maziarz
  - Michael Nozzolio

**FINANCIALS**

**REVENUE**

- Government Grants 3,689,955
- Non-Government Grants 1,079,023
- Donations/In-kind 431,767
- Fee Income 690,739
- United Way 427,011
- Interest Income 21,565
- Portfolio Income 101,426
- Bridge to the Future Released 23,200
- Misc. Income 4,220
**Total Revenue** $6,468,906

**EXPENSES**

- Salaries 3,621,307
- Fringe Benefits 717,370
- Operating 1,845,290
- Rent 265,317
**Total Expenses** $6,429,284

**Changes in Net Assets** 39,622

**FINANCIALS**

**Total Revenue** $6,468,906
**Total Expenses** $6,429,284
**Total Assets** $1,834,024
**Total Liabilities** $1,287,768
**Unrestricted Net Assets** $546,256

**Expenses by Service**

- Boomer Mentor Program 31,802
- Case Management 1,106,890
- Developmentally Disabled Elderly 740,587
- Education Services 45,998
- Elder Abuse Prevention 954,440
- Employment Services 343,969
- Financial Services 594,373
- Fundraising and Marketing 279,638
- Future Care Planning 423,438
- Geriatric Addiction 143,455
- HEAP 123,761
- Home Modification 106,521
- Interpreting Services 333,618
- Miscellaneous 50,365
- Nursing Home Culture Change 154,403
- Ombudsman 236,896
- Volunteer Services 190,465
- Volunteer Transportation 28,563
- Wolk Older Adult Center 280,391
- Women in Transition 259,711
**Total Expenses by Service** $6,429,284

**Expenses**

- Program Services 5,508,584
- Management and General (net) 714,144
- Fundraising 206,556
**Total Expenses** $6,429,284

**ANNUAL REPORT 2009 / 2010**
Celebration of Aging

When we solicited nominations of people 100 or older to honor at our 2010 Celebration of Aging, we had no idea how many inspiring centenarians live among us! Twenty-one people 100 or older attended the event where none-other-than Willard Scott of NBC’s Today show spoke about each one.

The event raised $213,000 thanks to a new, very generous matching dollar opportunity from the Daisy Marquis Jones Foundation. The foundation gave Lifespan a 2:1 match of every dollar contributed by the 1300 attendees during the Celebration of Aging.

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Superhero Sponsors

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University of Rochester Medical Center
University of Rochester
Division of Geriatrics/Aging
University of Rochester School of Nursing
Visiting Nurse Service
Vivenzio, Dr. Rocco
Workers United
Wegmans Food Market
YMCA of Greater Rochester

Special thanks to:
Marten Czamanske Photography
Park Place Limo
Monroe Wheelchair
More than **25,000** served.

Lifespan helped **121** persons with developmental disabilities maintain their independence.

"If it was not for Lifespan I would not be working today. I am very glad I found your phone number in the yellow pages of my phonebook."

"Your knowledge and your guidance has helped me a lot. I cannot find a word or phrase to express my feeling and thanks to you. I am so impressed by your attitude to help those who need help."

105,364 phone calls were made to older adults throughout the country to educate and warn them of the risks of telemarketing fraud and scams.

Financial exploitation was a component in **43%** of elder abuse cases handled by Lifespan. We eliminated the abuse or reduce the risk of future abuse in **94%** of cases.

"Applying for Medicare is confusing, frustrating and stressful. Irene & Ron make this easier with the workshop. Irene is truly a lifesaver with a one-on-one meeting. It made my stress more manageable."

The Geriatric Addictions program assisted **142** older adults. **59%** reported abstinence and **27%** decreased their use of alcohol/drugs.

**124** trained Ombudsmen monitored/advocated for residents of long-term care facilities. Ombudsmen investigated **1182** complaints about care and **90%** were adequately resolved.

**310** homes were modified to prevent falls.

Eldersource provided **12,863** telephone consultations for older adults, caregivers and allied professionals. The highest percentage of calls (19%) was about housing options, followed by financial/legal questions and caregiver support.

**369** people attended “how to find a job in retirement” workshops.

**63** bonded, trained volunteers helped **462** elders (mostly women age 75 and older) with bill paying and financial tasks. **88%** were able to pay bills in a timely manner.

Staff and volunteers provided counseling and information about Medicare for **1768** older adults. **3191** attended Medicare 101 workshops.

**161** families completed making written plans for the future care of a loved one with a disability.

"You were very helpful in helping me with my problems, mostly drinking. At this time I’m doing well. Should start to slip I plan on calling Lifespan for help again."

"I’m so very happy with the careful and helpful way you listened to our needs and made suggestions for our safety."

"The Center is like home to me now, and my friends there are my family."

"It is great that there are volunteers willing and able to help us senior citizens that can no longer do certain things as we did before."

**294** volunteer drivers provided **15,499** hours of transportation for older adults who needed to get to medical and other appointments.

**519** older adults participated in meals and activities at Lifespan’s Wolk Older Adults Center.

"All the Ombudsmen we had contact with were extremely helpful and had lots of suggestions for resolving problems. I was so glad you kept in touch with Mom as well as responding to my requests."
Lifespan’s Vision

Lifespan celebrates aging well by encouraging dignity, choice and independence. We are a recognized leader and focal point for age-related needs by providing valued, quality services. When our community thinks of the second half of life, it thinks Lifespan.

Lifespan’s Mission

Lifespan’s sole mission is to help older adults take on both the challenges and opportunities of longer life. Lifespan provides a continuum of direct services and unbiased information, guidance and advocacy for older adults and caregivers. We also provide training and education for allied professionals and the community.

Lifespan’s Customer Outcomes

Our services improve the quality of living for persons in the second half of life by...

• Increasing financial security;
• Reducing the risk of elder abuse;
• Improving caregiving;
• Maintaining and increasing independence and safety;
• Increasing fulfillment;
• Increasing options and knowledge.

www.lifespan-roch.org
244-8400