POWERFUL PARTNERSHIPS

fuel Lifespan’s ability to help older adults and their caregivers take on the challenges and opportunities of aging
POWERFUL PARTNERSHIPS FUEL LIFESPAN’S ABILITY TO ASSIST MORE PEOPLE IN BETTER WAYS!

In 2008, one of our powerful partnerships, Future Care Planning Services, was a semi-finalist for the national Collaboration Prize awarded by the Lodestar Foundation. The prize is “designed to inspire cooperation among nonprofit organizations, recognize the efficiencies gained from working together and shine a spotlight on collaborations when each would otherwise provide the same or similar programs or services and compete for clients, financial resources, or staff.” The foundation received more than 600 nominations. We were among the top 30.

The phrase, “when each would otherwise provide the same or similar programs or services and compete for clients, financial resources, or staff,” in Lodestar’s description of collaboration caught my eye because that is EXACTLY what would have occurred had the three agencies, Lifespan, the Al Sigl Center for Community Agencies and The Arc of Monroe County, not come together to research and launch a joint service. Each agency had noticed a new need, a new trend — that people with disabilities, especially developmental disabilities — were outliving their parent caregivers for the first time in history. Each agency was trying to handle the fallout from crisis situations occurring when a parent caregiver died or became frail/ill. Instead of competing — and trying to decide — is it an aging field issue or a disability field issue — we joined forces — with each agency bringing different strengths to the table.

Lifespan has other, equally impressive, equally powerful partnerships. One of them is Eldersource, a collaborative service of Lifespan and Catholic Family Center. The other is the SHARE Alliance, a partnership of the University of Rochester, Lifespan, Eldersource and Catholic Family Center. This annual report includes descriptions of these partnerships and the impact they have in our community.

Warm Regards,

Ann Marie Cook
President/CEO
When doctors at the University of Rochester’s Department of Psychiatry decided to focus on depression and older adults, they approached Lifespan, Catholic Family Center and our collaborative service, Eldersource, about delving into the issue. Our partnership was solidified in 2006 when UR won a $2.57 million, five-year grant from the National Institute on Mental Health to develop a community-based system to identify and treat older adults suffering from depression and other mental illnesses.

The SHARE Alliance (Senior Health and Research) is built on the premise that aging service providers play an important role in identifying and addressing the mental health needs of older adults in the course of their daily work. The stigma of mental illness means that older adults rarely seek help from mental health providers. But many older adults and family members contact Lifespan, Eldersource and Catholic Family Center with other needs. Our staff members often discover that the presenting problem is just one of many for an older adult coping with multiple losses, changing family dynamics, and myriad other challenges associated with maintaining one’s independence.

As a result of the partnership, our staff members were trained to better recognize the signs and symptoms of depression. SHARE Alliance research has found that of the 2600 clients that Eldersource care managers serve each year, over 30% struggle with mental illnesses including depression, anxiety, cognitive disorders, and substance misuse. The partnership developed a Geriatric Wellness Screen to use during the assessment process, and a Mental Health Specialist in Eldersource works closely with the Department of Psychiatry to better treat depression in older adults and other mental illness in older adults.
or the first time in history, people with developmental disabilities are outliving their traditional caregivers — their parents. About ten years ago, Lifespan’s staff began noticing a problem with this trend. Families were not planning for the care of the person with the disability before the parent died or became frail. As a result, more and more families were coming to us in crisis situations.

Knowing that the trend needed a solution, Lifespan reached out to the Al Sigl Center for Community Agencies and The Arc of Monroe County, local disability service providers. Staff at those agencies also had noticed the issue. Instead of starting competing services, the three organizations approached the B. Thomas Golisano Foundation about developing a collaborative, local response. In 2002, the foundation funded Future Care Planning Services to help aging caregivers develop written health, housing, legal, financial and guardianship plans pertaining to the future care of their loved ones with disabilities.

Future Care Planning Services takes caregivers through a four-step process designed to encourage and motivate them to complete a plan. The process includes the development of a “Letter of Intent,” a legacy document that describes both the caregiver’s and disabled person’s wishes and preferences. We also walk caregivers through the maze of legal and financial planning options including Social Security, health insurance, wills and establishment of powers of attorney, supplemental needs trusts, burial planning, and guardianship.

By the end of 2008, 875 families had started the planning process with 78% completing their plans and the remainder in progress. As noted by our outside evaluator, “It is clear that there is a high level and sustained satisfaction with the FCPS initiative. 94% of 2007 respondents were very satisfied with the written plan developed.”

Our partnership — one between aging and disability service providers — is a model for the country. And recently, a group of agencies near Toledo contracted with us to help them duplicate Future Care Planning Services. It is truly a powerful partnership.
Increasing longevity is changing our social fabric. We all know of 65-year-old daughters caring for 90-year-old mothers or 85-year-old wives caring for their husbands. The breadth and depth of eldercare is unprecedented, and it required those of us in aging services to react. We did so in 1995 with the launch of Eldersource as a powerful partnership between Lifespan and Catholic Family Center.

Instead of creating duplicative intake systems, we created one. Instead of creating competitive information and referral, in-home assessment and care planning services, we created one. We merged staff, supervision and clinical policies. Rochester Gas & Electric viewed the new collaboration as a signature program and became our funding partner.

Despite formally working for two agencies, Eldersource staff members work as a team. Four Eldercare Specialists staff the phones — answering more than 13,000 calls in 2008. Eldersource care managers visit older adults and/or their families at home to assess situations and recommend supportive services. Another team of Eldersource care managers works in 11 Rochester Housing Authority buildings and still others work at Rochester Highlands and Kings Court apartment complexes in an additional partnership with Jewish Family Service.

As a now 14-year-old partnership, Eldersource has helped thousands of older adults and caregivers by providing much needed information and guidance.

“My family was in a crisis situation when we called Eldersource. My sister and I were caring for our parents. Our father was dying from lung cancer while our mother, who has severe Alzheimer’s, was undoing our attempt to ease his suffering. This circumstance was greatly alleviated with your help. Your social worker treated us with compassion, and worked tirelessly on our behalf. She found a nursing home to take our mother and in doing so we were able to concentrate on our father. When he died two weeks later, it was peacefully, as we hoped. We will always be grateful to Eldersource and your efforts on our behalf.”
LIFESPAN OFFERS DAY HABILITATION
New York State gave Lifespan the go-ahead to provide Day Habilitation services for older adults with developmental disabilities. “Day Hab” helps people with developmental disabilities develop, improve or maintain their independent living skills. Lifespan specializes in providing programming for older adults with developmental disabilities including day hab, service coordination and integration into community senior centers.

HOW-TO MANUAL PUBLISHED

LIFESPAN’S OMBUDSMAN PROGRAM EXPANDED TO WYOMING COUNTY
Lifespan now provides Ombudsman services in nursing and adult homes in six area counties including Monroe, Wayne, Livingston, Genesee, Yates and now Wyoming. Ombudsmen are trained volunteers who visit long-term care facilities to advocate for residents and to help resolve issues involving care.

LIFESPAN AND THE NYS COALITION ON ELDER ABUSE SUCCESSFULLY PUSHED FOR POWER OF ATTORNEY LAW REFORM
The ability to grant power of attorney to another individual is a very useful and powerful tool. However, after noting a significant rise in cases of financial exploitation resulting from abuse of power of attorney, Lifespan and the NYS Coalition on Elder Abuse worked with the Legislature to get the law changed. New Yorkers now have new protections from financial exploitation through power of attorney.

COMMUNITY POOLED TRUST LAUNCHED
The B. Thomas Golisano Foundation funded the Al Sigl Center for Community Agencies to establish and maintain a community pooled trust for the Future Care Planning Services program. This is a new local community pooled trust for people with disabilities and their families. The Future Care Community Pooled Trust provides a convenient and economical way to have trust funds administered for people with disabilities. The use of funds from the trust will supplement, but not supplant, government benefits and enhance the quality of life for beneficiaries.

MAJOR ACCOMPLISHMENTS

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LIFESPAN LAUNCHES SAFER, A PERSONAL EMERGENCY RESPONSE SYSTEM, IN PARTNERSHIP WITH DOYLE MEDICAL MONITORING

Lifespan’s new Safety Alert for Emergency Response (SAFER) System, powered by Doyle Medical Monitoring, is an easy to use one-push button that will immediately connect the person to the Doyle Emergency Response Center located here in Rochester. SAFER is perfect for older adults living alone and those at-risk for falls.

LIFESPAN LAUNCHES PEACE OF MIND PLANNING

Lifespan’s new Peace of Mind Planning service can help older adults organize important personal, legal, financial, insurance and medical information. The Peace of Mind Planning service consists of a telephone consultation and three meetings. At the end of the planning process, clients receive an easily updatable three-ring binder and a CD to take home.

STAFF/PROGRAM AWARDS AND HONORS

Art Mason, L.M.S.W, director of Lifespan’s Elder Abuse Prevention Program, is serving as President of the National Adult Protective Services Association.

Future Care Planning Services, a collaborative program of Lifespan, the Al Sigl Center for Community Agencies and The Arc of Monroe County, received an Honorable Mention from the National Alliance for Caregiving. The program also was selected as one of 30 semi-finalists (out of 644 nominations) for a national $250,000 Collaboration Prize.

Kelly Zunner-Daniels, L.M.S.W., a staff member in the Geriatric Addictions Program, completed her Masters in Social Work.

Tammy Leach, C.A.S.A.C., director of the Geriatric Addictions Program, was invited to give a presentation at the Pennsylvania Behavioral Health &Aging Coalition Conference.

Special Thanks To

Dr. Bernard Brody and Rachel Brody Bandych for their ongoing support of Lifespan.

John DiMarco for his very generous support of Lifespan.

Catherine Carlson for her charitable contribution to the Guardianship program.

During these very difficult fiscal times, we extend our special thanks to our 2009 sponsors and table supporters.

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W e couldn’t have asked for more! Our speaker, 80-year-old Dr. Ruth Westheimer, was both frank and humorous at Lifespan’s 13th Celebration of Aging luncheon. Once again, 1200 people attended, and the event raised $145,000 thanks to our very generous sponsors, table supporters and individuals who purchased tickets. Lifespan uses revenue from this event to bolster services that are not completely supported by government or foundation grants or fees.
## FINANCIALS

### REVENUE
- Government Grants: $3,423,429
- Non-Government Grants: $1,077,448
- Donations/In-kind: $422,946
- Fee Income: $655,374
- United Way: $310,076
- Interest Income: $32,907
- Portfolio Income: $-115,502
- Bridge to the Future Released: $59,141
- Misc. Income: $916

**Total Revenue: $5,886,735**

### EXPENSES
- Salaries: $3,249,589
- Fringe Benefits: $638,875
- Operating: $1,813,558
- Rent: $241,352

**Total Expenses: $5,279,721**

### Excess (Deficiency) of Support and Revenue over Expenses
- Before Equity in Earnings of Eldersource: $-56,639
- Equity in Earnings of Eldersource: $-8,592
- Changes in Net Assets: $-65,231

**Total Assets: $1,897,893**
**Total Liabilities: $1,391,837**
**Unrestricted Net Assets: $506,020**

### Expenses by Service

<table>
<thead>
<tr>
<th>Service</th>
<th>Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Management</td>
<td>816,943</td>
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<tr>
<td>Aging Adults with Developmental Disabilities</td>
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<tr>
<td>Education Services</td>
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<td>Elder Abuse Prevention</td>
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<td>Employment Services</td>
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<td>Financial Services</td>
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<td>Fundraising and Marketing</td>
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<td>Future Care Planning Services</td>
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<tr>
<td>Geriatric Addictions</td>
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<td>Home Energy Assistance Program</td>
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<td>Home Safe Home</td>
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<td>Interpreting Services</td>
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<td>Miscellaneous</td>
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<td>Nursing Home Culture Change</td>
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<td>Ombudsman</td>
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<td>Volunteer Services</td>
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<td>Volunteer Transportation</td>
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<td>Wolk Older Adult Center</td>
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<td>Women in Transition</td>
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**Total Expenses by Service: $5,891,273**

### TOP “20 IN 20” POWERFUL PARTNERS:
The Top 20 Foundation, Corporate & Personal Funders of Lifespan in the Last 20 Years!

**Our Special Thanks Goes To…:**

- B. Thomas Golisano Foundation
- Chester & Dorris Carlson Charitable Foundation
- Davenport Hatch Foundation
- Eastman Kodak Company
- Excellus BlueCross BlueShield
- Farash Corporation
- Fred & Floy Wilmott Foundation
- John and Jayne Summers Foundation
- John DiMarco
- LECET – Laborers Local 435
- M&T Bank
- MedAmerica Insurance Company of NY
- MVP Health Care
- Rochester Business Journal
- Rochester Gas & Electric Corporation
- The Brody Charitable Trust
- The Daisy Marquis Jones Foundation
- The Gleason Foundation
- The Louis S. & Molly B. Wolk Foundation
- Wegmans Food Markets
IMPACT

More than 21,000 served.

Lifespan staff members investigated 361 cases of elder abuse. Financial exploitation was present in 43% of the cases. We were able to make a significant difference in 92% of cases.

One part-time staff member and two volunteers installed fall prevention equipment like grab bars in 470 homes.

We made 71 dreams come true through the Golden Wishes program which grants simple wishes for older adults living in long-term care facilities.

Lifespan’s Geriatric Addictions Program helped 127 older adults.

The Consumer Fraud Prevention Program made 134,310 calls to older adults living all over the country to provide education about fraud and scams.

The Eldercare Specialists in Eldersource answered 13,286 phone calls from older adults, caregivers and other professionals.

64 trained, bonded and dedicated volunteers helped 452 elders with monthly bill paying and budgeting tasks.

1551 older adults or caregivers called us for guidance about Medicare and Medicare prescription drug options.

Lifespan volunteers and staff helped 276 older adults file for the 2008 tax rebate — netting $82,000.

1854 people attended presentations or received one-on-one guidance about long-term care insurance.

Future Care Planning Services* helped 263 families plan for the future care of a loved one with a disability.

We provided more than 8200 hours of sign language interpreting for 176 businesses and organizations.

Trained volunteer Ombudsmen investigated complaints from 1481 residents of long-term care facilities and/or family members. 87% of cases were resolved. Ombudsmen are trained to advocate and mediate.

646 older adults participated in meals or activities at Lifespan’s Wolk Older Adults Center in downtown Rochester. This was a 27% increase over attendance in 2007.