2007 CALENDAR YEAR RESULTS

20,688 people served
(a 5% increase over the previous year)

With a grant from the AARP Foundation, Lifespan’s Consumer Fraud Prevention program made 96,105 outbound telephone calls to older adults throughout the country to warn them about scams and telemarketing fraud. Most of the calls were made by volunteers who contributed 2,842 hours to the project!

Lifespan staff members investigated 319 cases of elder abuse. We were able to make a significant difference in 91% of cases by working with the older adult, the alleged perpetrator and the criminal justice system.

Our elder abuse prevention staff also trained 1,491 allied professionals to recognize the signs and symptoms of elder abuse.

12,585 people called Eldersource1 for information and guidance about elder care.

Lifespan coordinates the work of the Statewide Coalition on Elder Abuse whose top priority is Power of Attorney reform that will make financial exploitation via Power of Attorney much more difficult.

Sixty three volunteers helped 467 frail elders with their ongoing bill paying and budgeting tasks.

Lifespan provided more than 10,000 hours of Sign Language Interpreting for 150 businesses and organizations.

Ninety-four volunteer Ombudsmen resolved 87% of 1,514 complaints from nursing home residents or their families.

Lifespan’s Home-Safe-Home service did minor home modifications (installing grab bars, railings etc. to prevent falls) in 430 homes.

232 volunteer drivers, recruited by our Give-a-Lift program for our community’s volunteer-based transportation providers, helped 415 older adults get to doctors’ appointments and grocery stores.

508 older adults used the Wolk Older Adults Center at Lifespan Downtown. 51% of participants were men! (Very unusual for a senior center.)

Our Passion Shows!
At Lifespan, we are passionate about older adults and the issues that envelop them.

I heard evidence of this at an all-staff meeting when I asked our managers to take three minutes to boast about their departments’ accomplishments during the last year. Not one of them said, “In 2007, my program served XX people.” Instead, they chose to tell the rest of the staff about their day-to-day work helping real people.

During this last year, we also asked our staff to nominate each other for our WOW! Award. It’s a monthly award given to a staff person who is “caught” delivering an amazing experience for a client, an experience that exemplifies our promise to help older adults and caregivers “take it on!” and an experience that illustrates our passion for our mission.

When I read the nomination forms every month, I am WOWed by their passion for their work, their passion for going the extra mile, their passion for improving the circumstances of the people who seek our assistance.

This annual report includes several of the WOW nominations that staff members submitted when recommending a co-worker or co-workers for our award – because while we can easily tell you that in 2007 Lifespan assisted more than 20,000 people—the numbers don’t begin to convey the impact our 95 staff members and more than 300 volunteers make in lives.

I am so proud of them and the work that they do. I believe that our passion shows.

Warm regards,

Ann Marie Cook
President/CEO
In December, an 80-year-old woman from Walworth walked into Lifespan very distressed over an issue with her mortgage company. She said she came here because she had called us once before, and we gave her good information. She didn’t know where else to go. She said she was being harassed and threatened with foreclosure by the company because she was two months late with her payment. She said she knew she was having memory problems so she went to her bank to set up automatic payment so she would not be late, but the company had not taken any money out. She had all the information with her, but she couldn’t tell exactly what had gone wrong, so I went in search of someone from our financial services department. Ron Brandwein stopped what he was doing and graciously offered to meet with the woman. He called the mortgage company headquarters in California, determined what happened, and gave the woman instructions on how to correct the situation. Ron spent a long time with her, sharing his knowledge and expertise, not only relieving her stress, but very likely preventing her from losing her home. I knew that we needed to do something immediately to help this woman because she was so distraught. I knew that Ron would not only know what to do, but that he would be more than willing to “come to her rescue.” No matter she didn’t have an appointment or even live within our service area. He made me proud to work here!
Lifespan Awarded Grant to Conduct a Statewide Elder Abuse Prevalence Study
Lifespan was awarded a $194,000 grant to conduct a statewide elder abuse prevalence study. The project is a partnership between Lifespan, the New York City Department for the Aging (NYC DFTA), and Cornell University. This will be the first in-depth, statewide study of elder abuse prevalence in the nation. The project is funded, in part, through the New York State Children and Family Trust Fund, a program administered under the NYS Office of Children and Family Services. Experts estimate that only 1 in 14 cases are known to authorities. Who are the perpetrators of elder abuse? In our community, sons and daughters 49%, other family:15%, not related: 21%.

Lifespan Hosted Information & Inspiration for Caregivers
In recognition of National Caregiving Month (November of each year), Lifespan hosted a month-long series of free workshops for caregivers of older adults. The series, Information & Inspiration for Caregivers, was sponsored by Preferred Care. About 25% of American families are caregiving for family members. The average caregiver is a 47-year-old employed woman.

Lifespan Received Grant for Outbound Scams & Fraud Education Call Center
Lifespan received a $200,000 grant from the AARP Foundation to open a call center dedicated to educating older adults around the country about scams delivered by telephone, mail and the Internet. Volunteers in our Consumer Fraud Prevention program call people identified by AARP as being at risk because they have already been scammed or their names may have been found on a call list that was seized when a telemarketing ring was exposed or they are known to be isolated or recently widowed.

Lifespan’s Ombudsman Program Expanded to Yates County
Lifespan now provides Ombudsman services in nursing and adult homes in five area counties including Monroe, Wayne, Livingston, Genesee and Yates counties. We added Yates County in 2007. Ombudsmen are trained volunteers who visit long-term care facilities to advocate for residents and help resolve issues involving care.

Lifespan Launched an Employee Recognition Program
Lifespan initiated a monthly awards program geared toward making our “take it on!” tag line come alive for our clients. Each month, staff members nominated by a peer receive our WOW! Award.” Winners included Dan Ryans, Lon Garofalo, Sue Genoud, Ron Bontstein, Jim Lynd and Bonnie McVicker. Tremendous teamwork also is acknowledged each month. Our team award winners were Consumer Fraud Prevention, Eldersource, Interpreting Services, Aging Adults with Developmental Disabilities, the Home Energy Assistance Program, Financial Services and Accounting.

Grant Allows Lifespan to Collaborate with UR on Elder Abuse Risk Assessment Tool
Lifespan’s Elder Abuse Prevention Program, Eldersource, and the University of Rochester’s School of Medicine’s Department of Psychiatry are developing an abuse screening tool for use by professionals in the aging field. The assessment tool will detect possible elder abuse, neglect and exploitation of older adults — something many experts believe is vastly underreported. The two-year project is funded by a grant from the National Institutes of Health/Aging.

Share Alliance
The SHARE Alliance is a partnership between the University of Rochester’s School of Medicine’s Department of Psychiatry and Eldersource, with collaborators from the Departments of Community and Preventive Medicine and the School of Nursing. The National Institute of Mental Health awarded a $2.57 million grant to UR to develop a community-based system to identify and treat older adults with depression and other mental illnesses using the Eldersource model. The project is the first comprehensive effort to join social services and mental health providers to develop approaches to care for the elderly. Some of the SHARE Alliance’s early work has shown that 28% of Eldersource clients have depression or anxiety significant enough to warrant evaluation for treatment. In the next phase, researchers will track and measure the effects of the Eldersource services on elderly clients. SHARE Alliance participants then will develop a collaborative system that utilizes the resources of aging services and mental health care providers.

Guardianship Grant Helps Families Plan
The B. Thomas Golisano Foundation awarded a grant to Future Care Planning Services’ to help families obtain guardianship of a loved one with a disability. Future Care Planning Services helps aging caregivers plan for the future care a loved one with a disability.

MAJOR ACCOMPLISHMENTS

Our passion shows!
by Doris Green, Future Care Planning Services, a collaborative service of Lifespan, Al Sigl Center and Arc of Monroe

Paul is 59, and he has Cerebral Palsy. He uses a walker, but very slowly, and it is a real struggle for him to speak. When I met Paul two years ago, he was very concerned that he wouldn’t be able to maintain his independence because of financial problems. He was referred to my program, Future Care Planning Services, by a CP Rochester caseworker. Well, Paul just completed a two-year follow up with us, and I am so proud of him and our staff because we all traversed the ups and downs of getting a plan in place for his future care. We connected him to an attorney who set up a Supplemental Needs Trust. We helped him become eligible for Medicaid and OMRODD (Office of Mental Retardation and Developmental Disabilities) services which made it possible to get more help for him in his home. And, we helped him move to a subsidized apartment which he loves!
Our passion shows!
By Ann McLane
Director of HEAP at Lifespan

Elaine (an Eldercare Specialist in Eldersource 1) received a referral from RG&E for an 82-year-old gentleman who had no heat. She immediately came to our program (HEAP – Home Energy Assistance) to discuss the situation. Because he does not have a phone, there was no way for us to reach him. Based on a very quick decision by Anne Woodhams in Eldersource, an Eldersource care manager made an immediate home visit to assess the situation and obtain a HEAP application. She even went to the gentleman’s bank to obtain income verification, as well as contacted RG&E to have temporary service restored. Because of the combined efforts and quick action from the Eldersource staff, my program (HEAP) was able to provide this individual with heating assistance. This is just one of the many examples of how the Eldersource team has been of help to HEAP since we relocated within Lifespan.

1 A collaboration of Lifespan and Catholic Family Center.

FINANCIALS

Revenue
- Government Grants 2,766,975
- Non-Government Grants 933,848
- Donations/In-kind 380,458
- Fee Income 752,975
- United Way 315,662
- Interest Income 41,533
- Portfolio Income 38,057
- Bridge to the Future Released 81,546
- Misc. Income 1,632
Total Revenue $5,292,686

Expenses by Service
- Case Management 743,214
- Deaf and Hard of Hearing 380,997
- Aging Adults with Developmental Disabilities 487,036
- Education Services 53,111
- Elder Abuse Prevention 716,486
- Employment Services 189,486
- Financial Services 604,053
- Fundraising and Marketing 300,604
- Future Care Planning Services 373,554
- Geriatric Addiction 133,247
- HEAP 117,582
- Home Safe Home 111,375
- Lobbyist 42,105
- Miscellaneous 1,814
- Nursing Home Culture Change 191,701
- Ombudsman 169,265
- Volunteer Services 170,311
- Volunteer Transportation 37,322
- Wolk Older Adult Center 241,125
- Women in Transition 234,833
Total Expenses by Service $5,279,721

Excess (Deficiency) of Support and Revenue over Expenses before Equity in Earnings of Eldersource $12,965
Equity in Earnings of Eldersource $12,965
Changes in Net Assets $12,965
Total Assets $1,554,638
Total Liabilities $971,476
Unrestricted Net Assets $583,162

Our passion shows!
By Art Mason
Director of Lifespan’s Elder Abuse Prevention Program

Despite being a “part time” staff member, Jim Lynd in our Anti-scams program puts in hours closer to a full-time person. He does scores of presentations for older adults, especially around the holidays, early in the day and also well into the evening when many of us are home after dinner. In the recent conviction of a notorious home improvement scammer, Jim used his expertise and networking skills to find the location of the perpetrator and then keep the momentum for prosecution going. The contractor is now serving 16+ years for fraud.

Jim’s attendance at the Bank Clearing-House Group allows other staff members in the Elder Abuse Prevention Program to have direct access to a number of law enforcement, bank, and other professionals that expedites our investigations with victims. It makes our jobs much easier. Jim provides amazing service to both his clients and colleagues, and does so in a quiet, unassuming manner.