Lifespan 2006–2007
Unaudited Unrestricted Fund

Revenue
Government Grants $3,097,359
Non-Government Grants 842,452
Fee Income 612,663
Donations/In-kind 468,711
United Way 325,660
Bridge to the Future Released 66,060
Interest Income 37,201
Portfolio Income 10,223
Miscellaneous Income 7,227
Total Revenue $5,467,556

Expenses
Salaries $3,100,811
Fringes and Benefits 623,831
Operating 1,507,006
Rent 233,286
Total Expenses $5,464,934

Excess (Deficiency) of Support and Revenue over Expenses before Equity in Earnings of Eldersource $2,622
Equity in Earnings of Eldersource 4,757
Changes in Net Assets 7,379
Total Assets $1,363,467
Total Liabilities $586,881
Unrestricted Net Assets $776,586

Expenses by Service
Employment Services $711,603
Elder Abuse Prevention 639,131
Financial Services 570,932
Case Management 566,646
Aging Adults with Developmental Disabilities 463,207
Future Care Planning 397,384
Deaf and Hard of Hearing 322,291
Fundraising and Marketing 321,654
Wolk Older Adult Center 214,758
Women in Transition 203,497
Nursing Home Culture Change 189,778
Volunteer Services 175,846
Ombudsman 169,672
Home Safe Home 152,092
Geriatric Addictions 139,569
HEAP 69,289
Volunteer Transportation 55,962
Education Services 52,459
Miscellaneous 42,300
Move and Technology 6,864
Total Expenses by Service $5,464,934

Expenses
Program Services $4,578,470
Management and General (net) 618,600
Fundraising 267,864
Total Expenses $5,464,934

Board of Directors 2006–2007
Chair
Rita D’Agostino
Vice Chair
Christopher Perna
Treasurer
Robert Nasso
Secretary
Jane Shukitis
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President/CEO
Ann Marie Cook
VP Program
Paul Caccamise
VP Marketing & Communications
Mary Rose McBride
Controller
Kathleen Collins

Photos: Marty Czamanske

Lifespan of Greater Rochester, Inc.
1900 South Clinton Avenue
Rochester, New York 14618
Address Service Requested


Photos: Marty Czamanske

Lifespan of Greater Rochester, Inc.
1900 South Clinton Avenue
Rochester, New York 14618
Address Service Requested


Photos: Marty Czamanske
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, useful services.

MISSION
Lifespan is the only comprehensive agency in the community whose sole mission is to help older adults take on both the challenges and opportunities of longer life. We achieve this by providing a continuum of direct services, advocacy, guidance, professional training and community education.

LIFESPAN’S CUSTOMER OUTCOMES
Our services improve the quality of life for persons in the second half of life by:

- Increasing financial security
- Reducing the risk of elder abuse
- Improving caring
- Maintaining and increasing independence
- Increasing fulfillment
- Increasing options and knowledge

LIFESPAN’S ORGANIZATIONAL VALUES
We respect older adults and treat them with dignity.
We provide services in a culturally sensitive manner and strive for diversity among staff and boards.
We collaborate when doing so enables us to better serve our clients.
We continuously seek out opportunities to innovate new services for older adults and caregivers.

DONORS

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<th>$10,000 or more</th>
<th>$5,000 – $9,999</th>
<th>$2,500 – $4,999</th>
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<td>Richard Machemer Ph.D.</td>
<td>William Irwin</td>
<td>Sunseeker Properties</td>
<td>Arthur Lowenthal</td>
<td>Alan &amp; Nancy Cameros</td>
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</table>
6.8% increase 
attended 
of victims lived 
of clients were 
80% 
satisfaction rate. 

---

RESULTS

Lifespan's fiscal year ended on budget with a small surplus. 

Total customers 
20,589, a 6.8% increase over the previous year. 
59% of our clients were age 75 or older. 
60% live in suburban towns and 40% reside in the city. 

We intervened in 
348 
stigmatized cases of elder abuse. 

Abuse was eliminated or reduced in 88% of the cases. 
Financial exploitation, the most prevalent type of abuse, occurred in 40% of our cases, followed by psychological abuse at 33%. 80% of clients were women and 21% were age 75 or older. 59% of victims lived in suburban towns. 

We trained 
2688 
people to recognize the signs and symptoms of elder abuse. 

Lifespan coordinates the activities of the New York State Coalition on Elder Abuse. 
We are working with the New York State Law Revision Committee to suggest changes to Power of Attorney laws. 

Paul Caccamise, Lifespan’s Vice President for Programs, was the keynote speaker at a World Elder Abuse Awareness Conference held in Australia. 

Art Mason, Director of Lifespan’s Elder Abuse Prevention Program conducted national training seminars for the U.S. Department of Justice. 

13,575 
people called Eldersource, a collaborative of Lifespan and Catholic Family Center, for information and guidance. Care management/case assistance was provided for 2873 older adults/caregivers. 
2405 
people used Lifespan Financial Services for bill paying, guidance about long-term care insurance and/or guidance about Medicare. 

1758 
older adults obtained one-on-one help with their health insurance choices — especially Medicare Part D. 
3284 attended Medicare Part D workshops. 
61 
dedicated volunteers made monthly visits to 449 frail older adults to help with bill paying. 89% had increased financial stability as a result of this service. 

Lifespan served as guardian for 33 older adults who were deemed incapacitated by a court. 
In this intensive service, we make legal, health, financial, and housing decisions on behalf of our wards. 

232 
caregivers consulted 
Future Care Planning Services’ 
for help planning for the future care of a loved one with a disability. 

95% of clients completing participation in Lifespan’s Geriatric Addictions Program improved in their functional ability. 

Volunteer advocates trained by Lifespan resolved complaints for 1501 residents living in long-term care to a 90% satisfaction rate. 

Home-Safe-Home, Lifespan’s fall prevention service, installed grab bars and railings and made other modifications in 451 homes. 

22,246 
meals were served at the Wolk Older Adult Center at Lifespan Downtown.
PROGRAMMATIC ADDITIONS

Consumer Fraud Prevention Project

Lifespan received a grant from the AARP Foundation to launch an outbound call center aimed at educating 100,000 older adults nationwide about scams and fraud.

Call center volunteers phone people on lists seized by law-enforcement officers from boiler-room telemarketing operations, warning them they may be in danger of being conned. Volunteers tailor their calls to a variety of cons, from ID theft to charity fraud to investment scams, depending on the need and the kinds of lists provided by law enforcement.

Eldersource Establishes Services for Naturally Occurring Retirement Communities

Eldersource, a collaborative service of Lifespan and Catholic Family Center, began providing intensive care management services in two targeted neighborhoods in Irondequoit and Brighton.

The care manager will assess residents’ needs and link them to services. The Irondequoit neighborhood sits next to Bishop Kearney High School and includes the Kings Court Manor Apartments and seven neighboring streets. In Brighton, Eldersource is located at the Highland Manor Apartments on Westfall Road.

Our grant partners, VNS of Rochester and Jewish Family Service, will provide additional supportive services that help older adults who are aging-in-place maintain their independence. Funding is provided by the New York State Office for the Aging.

HEAP Becomes a Service of Lifespan

The Home Energy Assistance Program (HEAP) for householders age 60 or older is now a program of Lifespan and relocated to our offices at 1900 S. Clinton Avenue.

Eldersource Awarded Point of Entry Contract for Long-term Care

New York State is establishing “New York Connects,” a place to call in every county that provides easy access to information and assistance for people who are exploring long-term care service options.

In Monroe County, Eldersource provides this service under a contract from the Monroe County Office for the Aging.

Golden Wishes for Residents in Long-term Care

This year a group of volunteers and Lifespan staff members started the “Golden Wishes” program, and they are proving that caring — in just small ways — can make all the difference in the lives of nursing home residents.

The Golden Wishes mission is straightforward — to bring smiles to the faces of nursing and adult home residents by granting them very simple wishes. To go shopping, to play golf, to go to a Red Wings game, to go fishing, to visit an incarcerated son, to touch a horse again, to eat a Big Mac. During the last year, wishes were granted to 54 residents with help from local businesses and our volunteer committee.

STAFF KUDOS AND AWARDS

Rose Marie Fagan was recognized for “Career Achievement” at the new Greater Rochester Awards luncheon hosted by the United Way and the Rochester Business Journal. Rose Marie came to Lifespan in the early 1990s, became Ombudsman Director and then launched the Pioneer Network, a national movement/organization to change the culture of care in nursing homes.

Future Care Planning Services, our collaborative with Al Sigl Center and The Arc of Monroe County, was a finalist in the “Program Impact Award” category of the Greater Rochester Awards.

Lifespan’s Ombudsman Program won the Nathaniel Award given by The Daily Record. The award is given each year to recognize individual and organizations that champion justice.

SPECIAL THANKS GOES TO

The more than 80 members of Lifespan’s staff who are passionate about older adults and the issues that envelop them.

Catherine Carlson for her generous support of Lifespan’s Guardianship services for older adults who are deemed incapacitated by the courts.

Excellus BlueCross Blue Shield and MedAmerica Insurance Company of New York for their continued and very generous support of Lifespan’s Celebration of Aging.

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

Senator Joseph Robach for his support of Future Care Planning Services, a collaborative of Lifespan, the Al Sigl Center and The Arc of Monroe County.

Preferred Care for sponsorship of Artful Aging.

FOUNDATION/CORPORATE GRANTS IN SUPPORT OF PROGRAMS

| Chester & Dorn Carlson Charitable Trust | Guardianship |
| Fred & Floy Willmott Foundation | Golden Wishes |
| Fred & Floy Willmott Foundation | Future Care Planning Services |
| The Max & Marion Farash Charitable Foundation | Geriatric Addictions Program |
| Louis S. & Molly B. Wolk Foundation | Wolk Older Adult Center at Lifespan Downtown |
| The New York Bar Foundation | NYS Coalition on Elder Abuse |
| Rochester Area Community Foundation | Employment Services |
| [Raymond P. Eckert Fund] | |
| [Dolores & Phillip Net Fund] | |
| Hargrave Charity | Deaf/Blind Group |
| M&T Bank | Future Care Planning Services |
| Freedom Forum | Give-a-Lift Transportation Consortium |
| Rochester Gas & Electric | Eldersource |
| MedAmerica Insurance Co. of NY | NYS Coalition on Elder Abuse |
| Excellus Health Plan, Inc. | Future Care Planning Services |
| Penfield Place | IPV/Domestic Violence Program |
| ESL | Wolk Older Adult Center at Lifespan Downtown |
| NCS HealthCare | Golden Wishes |
| American Bar Association | Fatality Review Team |
| American Society on Aging | MindAlert |
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**FOUNDATION/CORPORATE GRANTS IN SUPPORT OF PROGRAMS**

Chester & Dorn Carlson Charitable Trust
Fred & Floy Willmort Foundation
Fred & Floy Willmort Foundation
The Max & Marion Fairish Charitable Foundation
Louis S. & Molly B. Wolf Foundation
The New York Bar Foundation
Rochester Area Community Foundation
[Raymond P. Eckert Fund]
[DeLoes & Phillip Net Fund]
Hargrave Charity
M&T Bank
Freedom Forum
Rochester Gas & Electric
MedAmerica Insurance Co. of NY
Excellus Health Plans, Inc
Penfield Place
ESL
NCIS HealthCare
American Bar Association
American Society on Aging

Foundation/Corporate Grants in Support of Programs

Deaf/Blind Group
Future Care Planning Services
Give-a-Lift Transportation Consortium
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Golden Wishes
Golden Wishes

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Preferred Care for sponsorship of Artful Aging.
Superhero Sponsors
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Harris Beach PLLC
Crossbridge Physicians PC

ACCOUNTABLE CARE ORGANIZATION
Unity Health System

CROSSBRIDGE PHYSICIANS CARE SYSTEMS

EXHIBITION SPONSORS

Artful Aging
More than 100 works by area artists age 55 or older were auctioned at our second Artful Aging event in September 2006. Proceeds from the auction benefited both Lifespan and the Memorial Art Gallery.

Special thanks to our sponsors:

Presenting Sponsor
Rochester
Care

Gallery Sponsors
AMAN Financial Services
Rochester Institute of Technology

Studio Sponsors
Dow-Schmiel Advertising
DPR Printing
The Gables at Brighton

Exhibition Sponsors
Constanza Foundation
Catholic Charities
Highland Hospital
HCR Home Care

RESULTS

Lifespan’s fiscal year ended on budget with a small surplus.

Total customers
20,589

20%

a 6.8% increase over the previous year.

59%

of our clients were age 75 or older.

60%

live in suburban towns and 40%

reside in the city.

We intervened in 348 substantiated cases of elder abuse.

Abuse was eliminated or reduced in 88% of the cases.

Financial exploitation, the most prevalent type of abuse, occurred in 40% of our cases, followed by psychological abuse at 33%. 80% of clients were women and 21% were age 75 or older. 59% of victims lived in suburban towns.

We trained 2688 people to recognize the signs and symptoms of elder abuse.

Lifespan coordinates the activities of the New York State Coalition on Elder Abuse.

We are working with the New York State Law Revision Committee to suggest changes to Power of Attorney laws.

Paul Caccamise, Lifespan’s Vice President for Program, was the keynote speaker at a World Elder Abuse Awareness Conference held in Australia.

Art Mason, Director of Lifespan’s Elder Abuse Prevention Program conducted national training seminars for the U.S. Department of Justice.

13,575 people called ElderSource, a collaborative of Lifespan and Catholic Family Center, for information and guidance. Care management/care assistance was provided for 2873 older adults/caregivers.

2405 people used Lifespan Financial Services for bill paying, guidance about long-term care insurance and/or guidance about Medicare.

1758 older adults obtained one-on-one help with their health insurance choices — especially Medicare Part D. 3284 attended Medicare Part D workshops.

61 dedicated volunteers made monthly visits to 449 frail older adults to help with bill paying. 89% had increased financial stability as a result of this service.

Lifespan served as guardian for 33 older adults who were deemed incapacitated by a court.

In this intensive service, we make legal, health, financial, and housing decisions on behalf of our wards.

232 caregivers consulted Future Care Planning Services’ help for planning for the future care of a loved one with a disability.

95% of clients completing participation in Lifespan’s Geriatric Addictions Program improved in their functional ability.

Volunteer advocates trained by Lifespan resolved complaints for 1501 residents living in long-term care to a 90% satisfaction rate.

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22,246 meals were served at the Wolk Older Adult Center at Lifespan Downtown.
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Lifespan’s Mission Values

We respect older adults and treat them with dignity.

Lifespan’s Customer Outcomes

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

- Increasing financial security
- Reducing the risk of elder abuse
- Improving categorizing
- Maintaining and increasing independence
- Increasing fulfillment
- Increasing options and knowledge

Lifespan’s Organizational Values

We provide services in a culturally sensitive manner and strive for diversity among staff and boards.

We collaborate when doing so enables us to better serve our customers.

We continuously seek out opportunities to increase access to services for older adults and caregivers.

DONORS

Maplewood Nursing Home
Mary Doyle
Howard & Marilyn Berman
American Red Cross
$250 – $499

Jim Buttrill
Margaret Aponte
Josh & Beth Bruner
John DiMarco

Donors

Tim Galli
Presbytery of Genesee Valley
Arthur & Barbara Hirst
Carolyn Bennett

Les & Ronni Abramovitz
Stewart Ackerman
Grace Ann Achter
Dan Butler

Stewart Ackerman
Grace Ann Achter
Dan Butler
Al Boylan

TO DONATE

Donations can be made online at lifespan.org. Thank you to all of our donors. Special thanks to those who generously supported us in the past year. With your continued support, we are working to ensure that Lifespan will be here for older adults and their loved ones for generations to come.

Thank You
VISON
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- Improving caregiving
- Maintaining and increasing independence
- Increasing fulfillment
- Increasing options and knowledge

DONORS

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Thank You