Caring About Older Adults Inspires Lifespan’s Staff

2018-2019 Annual Report
Dear Friends of Lifespan,

Lately when I walk by our boardroom, instead of seeing people in a meeting, I see a cadre of people learning Tai Chi. Or, I run into one of our volunteer peer coaches carrying a bowl of healthy treats into our training room for a Living Healthy class.

We made a commitment several years ago to focus on ways Lifespan could help older adults live longer, better. We added a position for a health and wellness coordinator, and we sent her for training in evidence-based programming. As a master trainer, she recruits volunteers to become peer workshop leaders — without them we would not be able to offer A Matter of Balance, Living Healthy, Tai Chi and Aging Mastery in multiple locations throughout Monroe, Livingston, and Wayne counties. And though several staff members are now trained to provide our health and wellness classes, new peer volunteers are always needed and welcome!

The more than 800 older adults who took one of our classes embody Lifespan’s “Take It On!” tagline. They are taking on longer life by trying to avoid falls, by trying to improve life despite having chronic illnesses, by looking for ways to continue contributing to our community.

One person responded to our satisfaction survey this way, “I will look into other classes that can be helpful to me in dealing with the aging process!” Another said, “I’m being more proactive to improve my balance and have encouraged friends who have balance issues to take this class.” We love word-of-mouth endorsements!

Lastly, I’m so proud that Lifespan won Rochester’s Top Workplace Award among mid-size businesses. In our health and wellness offerings, in our care management role, in our work to fight and prevent elder abuse, and in our 30 other services, our 160 staff members truly do have a passion for helping older adults take on the challenges and opportunities of longer life.

Warmly,

Ann Marie Cook
President/CEO
Taking on Falls, Chronic Disease and Longer Life

Helping older adults improve their health and wellness has become one of our core activities. Why?

Falls are a leading cause of injury and death for older adults yet falling is not a natural part of aging!

We're living longer with chronic illnesses. Three in four Americans 65 and older have multiple chronic conditions including heart disease, cancer, emphysema, diabetes or stroke.

Older adults want and need continued meaning and purpose.

To provide the best options, we searched and found evidence-based workshops developed by leading universities and organizations that address fall prevention, healthy living and longer life.

The classes include:
- A Matter of Balance, developed by Boston University.
- Living Healthy and Living Healthy with Diabetes, developed by Stanford University.
- Tai Chi for Arthritis developed by Dr. Paul Lam at the Tai Chi Institute.
- Aging Mastery, developed by the National Council on Aging.

What we know about falls and older adults.
- A majority of falls occur during routine activities.
- Falls usually aren’t caused by just one issue. It’s a combination of things coming together.
- A large portion of falls are preventable!
- Falling is not a natural part of aging!
A Matter of Balance is an eight-session workshop proven to help reduce the fear of falling and increase activity levels. Participants learn:

- To view falls and fear of falling as controllable.
- To set realistic goals for increasing activity.
- To change their environment to reduce fall risk factors.
- To promote exercise to increase strength and balance.

Physicians are now routinely asking about falls, and they refer people to this workshop.

Tai Chi for Arthritis is an evidence-based, 16-session workshop that helps alleviate the challenges with arthritis including pain, stiffness, lack of motivation to keep moving and the need for medications and assistive devices. It increases strength, balance, and posture, also helps prevent falls, and reduces stress.

Our Home-Safe-Home service provides minor home modifications that also help prevent falls.

Living Healthy and Living Healthy with Diabetes are evidence-based, six-session workshops. Goals include improving exercise and activity levels, managing symptoms, improving relationships between doctors and patients, improving social activities, and reducing fatigue.

Aging Mastery is a ten-session workshop that helps older adults live more meaningful lives. The sessions focus on navigating longer lives, exercise, sleep, healthy eating, financial fitness, medication management, advance planning, healthy relationships, fall prevention, and community engagement.

Sarah Otis, our health and wellness coordinator, is a master trainer for each of our offerings. She also was named regional coordinator for an effort to develop a western New York falls prevention network hub. She trains volunteers who become peer coaches/trainers for the workshops. We have a core group of 40 volunteers who lead at least two workshop sessions a year. New volunteers are always welcome!
The Fan Club

During the summer of 2018 heatwave, Lifespan collaborated with “The Fan Club” to deliver fans to older adults and persons with disabilities who did not have another cooling means. Through news stories, Facebook and other outlets, more than 200 people chipped in almost $15,000 for the purchase of fans. We delivered more than 300.

Taking on Opioid Addiction in Older Adults

The Geriatric Addictions program received a grant in conjunction with University of Rochester Finger Lakes Geriatric Workforce Enhancement Program to provide education and training about opioid addiction and older adults. One hundred professionals attended a day-long conference, “Opioid Use & Risks: A Practical Approach to Harm Reduction in Older Adults.”
Statewide Expansion of Enhanced Multidisciplinary Teams Continued

Lifespan continues to launch Enhanced Multidisciplinary Teams (E-MDTs) throughout New York State. E-MDTs differ in that they focus on financial exploitation while also addressing other co-occurring forms of abuse. E-MDTs are comprised of professionals from various disciplines whose primary focus is to investigate, intervene, and prevent financial exploitation of older adults. E-MDTs have unique access to a forensic accountant and geriatric psychiatrist in addition to drawing on the expertise of disciplines including aging services, the financial industry, and local legal and law enforcement. The team provides a holistic response which includes recommendations and support to those working on complex cases of financial exploitation. E-MDTs were added in seven counties including Broome, Chautauqua, Allegany, Clinton, Franklin, Dutchess and Ulster. The work of the E-MDTs resulted in $187,000 in court-ordered restitution for older adults. The team held an E-MDT conference in Rochester with 95 attendees from around the state.

Improving Care by Connecting with Medical Systems

For decades, aging service providers like Lifespan and medical providers worked in siloes — something that did not make sense. Our Community Care Connections service is integrating our social workers and LPN nurses with medical systems of care to improve health outcomes for older adults. In a pilot project, patients referred to our service experienced a decrease in unnecessary hospitalizations and ED visits and opened physicians’ eyes to the factors that influence health outcomes outside of their offices — factors such as the home environment, finances, lack of caregiver and lack of transportation. The success of the pilot led to new contracts with Accountable Health Partners, the Finger Lakes Performing Providers System, Excellus and grants from ESL Federal Credit Union, Wegmans and the Greater Rochester Health Foundation.
Hosted 14 sessions of Powerful Tools for Caregivers. 98% told us the classes helped them better prepare for the future and for their caregiving role.

“The emotional support from others in the class was helpful. Very caring and positive facilitators.”

Provided 19,423 hours of respite for family caregivers. Respite allows caregivers to take a several hour break each week. 96% of our caregivers said the break helped reduce their stress.

The most prevalent form of elder abuse in our 2018 cases was financial exploitation at 54%. Our goal in elder abuse prevention is to reduce or eliminate the risk factors. We accomplished this in 83% of 309 cases.

Lifespan is facilitating the statewide launch of Enhanced Multidisciplinary Teams to fight financial exploitation of older adults. E-MDT’s which include law enforcement officials and a forensic accountant are meeting in 29 New York State counties.

Our 107 volunteer financial managers provided 10,592 hours of service to help 458 older adults with budgeting and bill paying tasks in Monroe and Genesee counties.

“With his (financial manager) help, I’m still living at home, and I’m 98-years-old.”

Lifespan was guardian for 31 incapacitated older adults. In our role, we make all housing, health, legal and financial decisions on behalf of our court-appointed wards.

We provided 4,899 consultations with 1,661 caregivers of a loved one living with Alzheimer’s disease.
### How we helped

<table>
<thead>
<tr>
<th><strong>Number</strong></th>
<th><strong>Details</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>4,044</td>
<td>people turned to Lifespan for information and guidance about Medicare.</td>
</tr>
<tr>
<td>3,100</td>
<td>attended one of our Medicare 101 workshops.</td>
</tr>
<tr>
<td>100%</td>
<td>of people returning satisfaction surveys said their knowledge improved, and 100% would recommend us to a friend.</td>
</tr>
<tr>
<td></td>
<td>“I was extremely anxious, stressed and I think not easy to work with. The counselor listened carefully and provided clear, understandable health insurance advice. Even my cat notices I’m calmer now!”</td>
</tr>
<tr>
<td>101</td>
<td>families completed our four-step future care planning process for a loved one with a disability. We assisted in establishing 103 17A guardianships.</td>
</tr>
<tr>
<td></td>
<td>“My adult son was born with spina bifida. As I became older, it was clear that some thought and planning needed to be done to provide for his needs. The Future Care staff is truly empathetic, knowledgeable, patient and professional. I sing your praises.”</td>
</tr>
<tr>
<td>445</td>
<td>volunteer drivers provided 17,650 one-way trips for older adults — mostly for medical appointments.</td>
</tr>
<tr>
<td>17,650</td>
<td>visits to nursing homes and adult care facilities in our nine-county region.</td>
</tr>
<tr>
<td></td>
<td>“Your persistence and advocacy led to victory! This made a difference in this resident’s well-being!”</td>
</tr>
<tr>
<td>86%</td>
<td>of clients in the Geriatric Addictions program decreased use or became abstinent.</td>
</tr>
<tr>
<td>80%</td>
<td>reported making new friends and 64% said the gathering spots for older adults give them something to look forward to.</td>
</tr>
<tr>
<td>1,991</td>
<td>people participated in activities and/or meals at our gathering spots at three YMCA’s.</td>
</tr>
<tr>
<td>960</td>
<td>homes.</td>
</tr>
<tr>
<td></td>
<td>“On behalf of my parents, and myself, thank you for this wonderful service!”</td>
</tr>
<tr>
<td>2,929</td>
<td>Volunteer Ombudsmen made visits to nursing homes and adult care facilities in our nine-county region.</td>
</tr>
</tbody>
</table>
Staff WOW! Award Winner

Lifespan’s mission is successfully carried out every day because of the commitment and expertise of our staff. In addition to their passion for their work, Lifespan staff always take time to recognize excellence in their colleagues’ work—living the “take it on with Lifespan” mission. The monthly WOW! Award is a staff-nominated recognition, and each year we choose our annual WOW! Award winner.

Ameera Bhanji, one of our care managers, is our 2018/19 annual WOW! winner. Ameera assisted a gentleman who was coping with communication difficulties from a stroke and aphasia (loss of ability to understand communication). She researched available services and advocated for him within very difficult and complex family dynamics. She helped facilitate a move and collaborated with his speech therapist to find a nearby Medicaid-approved specialized speech therapist. She connected him to transportation, advocated with community providers, followed up with assessments that were previously denied and advocated with his doctor’s office. She continued to assist his wife — essentially taking on two clients who needed extensive emotional support.

Ameera’s passion for her work meant putting in additional hours and agreeing to meet outside of our traditional work day to collaborate with LawNY. She also assisted with a supplemental needs trust, simplifying the explanation for his ease and understanding. Her nominator wrote, “Imagine how difficult it is to regularly communicate with someone with aphasia or cognitive issues. She took the time to learn his best form of communication (text message) and modeled this for the other involved professionals. With the integrity and dedication she shows to her clients, Ameera is a model for our agency and work!”

“Amee is a model for our agency and work!”

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For Michelle LeBoo, working with older adults is a joy — and something she said she’d like to do forever.

“I love them. These guys are my family,” LeBoo said. “They’ve saved my life. I don’t know what I would do without them.”

LeBoo is the coordinator at the Caroline “Lily” Lobozzo Aging Resource Center at the Maplewood YMCA, which is operated by Lifespan of Greater Rochester. She has worked at Lifespan’s “Lily Cafe” since it opened eight years ago and said she can’t imagine ever working anywhere else.

“It has been the best job I’ve ever had in my life,” LeBoo said. “There’s no place I’d rather be.”

The nonprofit offers programming and services to help older adults maintain a more independent life.
lifestyle and take on the challenges that come with age. It has about 160 full- and part-time employees and twice as many volunteers that are essential to the operation, President and CEO Ann Marie Cook said.

The baby boomer generation is aging — and fast. About 10,000 boomers turn 65 each day in the United States, Cook said, and the need for older adult programming and support services has never been greater. “So much of it is the boomers — it’s just so many people in one generation,” Cook said.

LeBoo said the Lily Cafe is not a traditional senior center — members aren’t kept at an arm’s length, and there’s certainly no bingo, she said. Rather, she greets everyone warmly when they walk through the door, she listens to their stories and tries to learn as much about them and their lives as she can.

“We hug hello, we tell each other we love each other, and we hug goodbye,” LeBoo said. “That’s sort of the motto here. We’re a family because a lot of people don’t have that anymore.” She’s constantly engaging with folks to see what kinds of things they’re interested in learning about, what they’re struggling with and what they’d like to try. A lot of LeBoo’s ideas for educational classes sprout from everyday conversations with members that clue her in to what they’re curious about in their lives.

“When I come to work, I’m not focused on working with older adults,” LeBoo said. “I’m focused on working with human beings, and that’s really cool. ... It’s what can people do, what do people need and how can we help them live their best life?”

LeBoo finds special joy in watching the older adults she works with help one another. Seeing real friendships form at the YMCA and the Lily Cafe is heartwarming and makes her feel like she’s fulfilling her duty through the programing and community Lifespan offers.

As a Lifespan employee, LeBoo said she’s able to foster those connections and find new ways to help older adults enjoy some of the best years of their lives. And for her, the company’s reputation for truly caring is empowering. “People in the community love and respect Lifespan because they get it,” LeBoo said. “They get that together we can do more.”
Seventeen hundred people attended our March 2019 event which raised $282,000. The Daisy Marquis Jones Foundation once again matched every dollar raised at the luncheon.

Kathrine Switzer, our Celebration of Aging guest speaker proclaimed, “We need a social revolution about aging!”

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YMCA of Greater Rochester

Our Celebration of Aging Honorees!
Top: Carolyn Blount, Bev Geier, Dolores Rycenga, Kathrine Switzer, Lucy Holland, Pam Tuety, Camilla Minor
## Financials

April 1, 2018 through March 31, 2019

### Revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Government Grants</td>
<td>$7,433,690</td>
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<tr>
<td>Non-Government Grants</td>
<td>1,009,902</td>
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<tr>
<td>Donations/In-kind</td>
<td>505,732</td>
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<tr>
<td>Fee Income</td>
<td>305,509</td>
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<tr>
<td>United Way</td>
<td>731,000</td>
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<tr>
<td>Interest Income</td>
<td>24,776</td>
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<td>Portfolio Income</td>
<td>5,318</td>
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<tr>
<td>Bridge to the Future Released</td>
<td>180,795</td>
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<tr>
<td>Fulfilling the Promise Released</td>
<td>70,000</td>
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<tr>
<td>Other Restricted Assets Released</td>
<td>659,555</td>
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<tr>
<td>Misc. Income</td>
<td>10,105</td>
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<tr>
<td><strong>Total Revenue - Unrestricted</strong></td>
<td><strong>$10,932,382</strong></td>
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### Operating Expenses

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<thead>
<tr>
<th>Expense</th>
<th>Amount</th>
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</thead>
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<tr>
<td>Salaries</td>
<td>$5,641,415</td>
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<tr>
<td>Fringes Benefits</td>
<td>1,287,152</td>
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<tr>
<td>Operating</td>
<td>3,592,521</td>
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<tr>
<td>Rent</td>
<td>345,861</td>
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<tr>
<td><strong>Total Expenses - Unrestricted</strong></td>
<td><strong>$10,866,949</strong></td>
</tr>
</tbody>
</table>

**Excess (Deficiency) of Support and Revenue over Expenses before Equity in Earnings of Future Care Planning**

$65,433

**Total Unrestricted Assets**

$3,005,177

**Total Unrestricted Liabilities**

$1,415,159

**Unrestricted Net Assets**

$1,590,018

### Expenses by Service

<table>
<thead>
<tr>
<th>Service</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aging Adults with Developmental Disabilities</td>
<td>$872,127</td>
</tr>
<tr>
<td>Caregiver</td>
<td>$316,601</td>
</tr>
<tr>
<td>Education Services</td>
<td>$31,401</td>
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<tr>
<td>Elder Abuse Prevention</td>
<td>$2,338,217</td>
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<tr>
<td>Eldersource</td>
<td>$862,759</td>
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<tr>
<td>Financial Services</td>
<td>$640,192</td>
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<tr>
<td>Finger Lakes Caregiver Institute</td>
<td>$1,668,015</td>
</tr>
<tr>
<td>Fundraising and Marketing</td>
<td>$328,583</td>
</tr>
<tr>
<td>Geriatric Addictions</td>
<td>$111,541</td>
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<tr>
<td>Healthcare Initiatives</td>
<td>$842,569</td>
</tr>
<tr>
<td>Home Energy Assistance</td>
<td>$125,703</td>
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<tr>
<td>Home-Safe-Home</td>
<td>$134,835</td>
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<tr>
<td>Matter of Balance</td>
<td>$68,976</td>
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<tr>
<td>Multidisciplinary Aging Resource Center</td>
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<tr>
<td>New York State Caregiving &amp; Respite Coalition</td>
<td>$264,040</td>
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<tr>
<td>NY Connects</td>
<td>$782,850</td>
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<tr>
<td>Ombudsman</td>
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<tr>
<td>Women in Transition Services</td>
<td>$78,230</td>
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<tr>
<td>Pioneer Network</td>
<td>$17,519</td>
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<tr>
<td>Volunteer Services</td>
<td>$183,442</td>
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<tr>
<td>Wolf Older Adult Center</td>
<td>$317,071</td>
</tr>
<tr>
<td>Other</td>
<td>$211,032</td>
</tr>
</tbody>
</table>

**Total Expenses - Unrestricted by Service**

$10,866,949


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Special remembrance of Tom Neugebauer, a Lifespan volunteer for almost 25 years. Tom volunteered as an Ombudsman, in our financial management service and as a health insurance counselor. He will be missed at Lifespan.
Lifespan placed number one among midsize companies on Rochester’s Top Workplaces list.

Our Mission
Lifespan helps older adults take on both the challenges and opportunities of longer life. Lifespan is a trusted source of unbiased information, guidance, services, training and advocacy for older adults, caregivers and the community.