

ADMINISTRATION

John B. Clark
President/CEO

Laura Garrett
Executive Vice President

Rosa B. Sakalarios
Vice President, Human Resources

Rachael Cox
Director, Marketing
Communications

Brandi Welk
Director, Development

Suzanne Jackson
Director, Social Services

Karen Barbee
Director, Community Services

Sandie Holtry
Director, Adult Day Health Care
(The Retreat)

Robin Stephens
Director, Foster Grandparent/Senior
Companion/RELIEF Programs

NOTABLE HIGHLIGHTS

IMPLEMENTATION OF FLORIDA'S STATEWIDE LONG TERM CARE MEDICAID MANAGED CARE PROGRAM (SMMC):

During 2014, the agency seamlessly transitioned all of its Medicaid clients into the new Statewide Medicaid Managed Care Program (SMMC). With this new program, clients choose one of two private Managed Care Plans to administer their long term care services, such as adult day care, home delivered meals, homemakers and other home and community based services.

UNITED WAY THREE-YEAR FUNDING:

The agency was pleased that its Senior Companion and Meals on Wheels Programs were selected by United Way of Escambia County for three year funding. Meals on Wheels will receive \$150,000 and Senior Companion will receive \$39,720 over the three year period.

INCREASED FUNDING FOR FLORIDA GENERAL REVENUE PROGRAMS (COMMUNITY CARE FOR THE ELDERLY, ALZHEIMER'S DISEASE INITIATIVE AND HOME CARE FOR THE ELDERLY):

During the 2014 Florida Legislative Session, legislators approved a substantial increase in funding for Florida's General Revenue aging programs which will fund such services as Meals on Wheels, adult day health care, homemakers, personal care assistance and other home and community based services. This was the first such increase in many years.

STATEWIDE ADVOCACY AND LEGISLATIVE ISSUES:

In 2014, senior Council on Aging staff members were involved with other Florida aging advocates in promoting funding increases for aging programs and the passage of other legislation affecting elders and their caregivers.

COMBINED STATEMENT OF ACTIVITIES

Year Ended December 31, 2013

Total Revenues.....	\$5,061,458
Program Service Expenses.....	\$4,358,279
Support Service Expenses	
Administrative Support.....	\$305,668
Fundraising Support.....	\$169,537
Total Expenses.....	\$4,833,484
Change in Net Assets.....	\$227,974
Net Assets at Beginning of Year.....	\$945,937
Net Assets at End of Year.....	\$1,173,911

Please visit www.coawfla.org to view our most recently audited financial statements and tax returns.

Location: 875 Royce Street • Mailing Address: P.O. Box 17066 • Pensacola, FL 32522-7066
(850) 432-1475 • info@coawfla.org • www.coawfla.org

Annual Report 2014



“The Senior Dining Site participants were gracious and understanding of Jean’s problems related to Alzheimer’s.”

- Wallace “Glenn” Duncan



Council on Aging of West Florida, Inc. is a 501(c)(3) not-for-profit corporation funded in part by grants and/or contracts with the NorthWest Florida Area Agency on Aging, Inc., the State of Florida Department of Elder Affairs, United Way of Escambia and Santa Rosa counties and the Corporation for National Services. Council on Aging also receives financial support from the City of Pensacola, Escambia County, Santa Rosa County and area businesses, organizations and individuals. 100% of donations go to Council on Aging of West Florida, Inc. Solicitation of Contributions Act registration #CH201.

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THE STATE. 1-800-435-7352

As an Accredited Charity, we have passed all 20 of the BBB Wise Giving Alliance's Standards for Charity Accountability. The BBB Wise Giving Alliance helps donors make informed decisions and advances high standards of conduct among organizations that solicit contributions from the public.



BOARD OF 13 DIRECTORS 14

OFFICERS

DeeDee Davis
Chair
Caron Sjoberg
First Vice Chair
Robert Mills
Second Vice Chair
Councilmember
P.C. Wu
Secretary
J.M. "Mick" Novota
Treasurer
Dona Usery
Immediate Past President

BOARD MEMBERS

Lorenzo Aguilar
Malcolm Ballinger
James Barnett, Ed. D
Sonya Daniel
Rabbi Joel Fleekop
Thomas Lampona, M.D.
Kathleen Logan
Andy Marlette
Escambia County
Commissioner Lumon May
Chaplain Larry Mosley
John Peacock
Tara Peterson
Diane L. Scott, Ph.D.,
Santa Rosa School
District I
Monica Sherman
Sue Straughn
Edgar M. Turner
Richard M. Tuten
Marie K. Young

MEMBERS EMERITI

Joe Black
Rosemary Bonifay
John Brick
Kenneth Kelson
Zola Lett
Charles H. Overman, III
Malcolm Parker
Ethel Tamburello

PRESIDENT/CEO

John B. Clark

MESSAGE FROM THE BOARD CHAIR



I am honored to have served as Chair of the Board of Directors for the past two and a half years and as my term concludes, it is an appropriate time to reflect

on the past year; to thank all those who contributed to the success of our agency; and to highlight, in this report, some of our many accomplishments. Council on Aging's board members, staff, volunteers and donors are a remarkable group of people committed to a mission of helping elders in Escambia and Santa Rosa counties "age in place" and avoid institutional placement. It is because of their combined efforts throughout the year that we have reached more than 2,000 elders, their caregivers and family members in support of that mission.

Our board has been actively engaged on many levels; they are active fundraisers and generous donors and volunteer in other capacities by directly helping program clients. They also use their professional talents to market, publish and produce collateral materials for many of our efforts. Some are actively engaged on several board committees and assist agency program staff in examining internal operations.

At the same time we have over 300 active volunteers delivering meals to home-bound elders, helping out at our Senior Dining Sites, serving on the agency's marketing team, performing administrative tasks at the agency office, helping with fundraising activities, transporting elders to doctors and Senior Dining Sites and much more. And speaking of volunteers, I would be remiss if I didn't mention our

unique and successful Rat Pack Reunion fundraiser. This event has been volunteer driven from its inception and has netted well over \$450,000 for the operations of the agency's programs and services described in this report. As the saying goes, "just because our volunteers (or any volunteer for that matter) are free, it doesn't mean they are worthless, just priceless." Indeed they are priceless and we would be lost without them.

Our dedicated staff also does a yeoman's job each day, linking clients with community resources that will help them meet their needs, coordinating and operating our 18 Senior Dining Sites, training and placing over 150 stipend volunteers with our Foster Grandparent and Senior Companion programs, operating The Retreat—the agency's adult day health care program, insuring the accurate delivery of Meals on Wheels to homebound elders, recruiting, training and placing our agency volunteers, informing the community of agency services and programs, coordinating the agency's transportation program, coordinating the agency's development activities, responding to hundreds of requests each year for assistance from caregivers and/or elders in need of assistance, and much, much more.

Yes, board members, volunteers and staff have been the linchpin of Council on Aging's operations. To all of you, I offer my heartfelt thanks. All of you have made the past two and a half years as Chair seem so effortless. We have been a great team and I look forward to bigger and better things to come.



Sincerely, DeeDee Davis

RAT PACK REUNION RAISES \$100K

Nearly 300 individuals attended the fourth annual Rat Pack Reunion on October 24, 2014, in support of Council on Aging of West Florida and its programs. At the event, four local business leaders including Larry "Moose" Morris, Jack Nobles, Tom Pace, Jr. and Jim Rigsbee, were honored for their leadership and service to the community.

"Everything came together just beautifully," said Jennifer Cole, chair of the Rat Pack Reunion Committee. "From the gorgeous room décor

to the hilarious roasting of our rats and dancing to the tunes of Ol' Blue Eyes... we could not have asked for a more exciting way to celebrate these generous community leaders while raising support for local seniors."

This year's Rat Pack Reunion tradition included an inaugural Rat Race 5K walk/run and a raffle for a pair of his and hers Rolex watches courtesy of Jewelers Trade Shop. The gala, 5K and raffle raised more than \$100,000 for Council on Aging.



From left to right: Jim Rigsbee, Tom Pace, Jr., Jack Nobles and Larry "Moose" Morris

FACTS AT A GLANCE

Meals on Wheels
Participants Served: 547
Meals Served: 152,263

Senior Dining
Participants Served: 959
Meals Served: 90,054

Adult Day Health Care (The Retreat)
Participants Served: 72

Foster Grandparent Program
Foster Grandparents: 71
Students Mentored: 273
Hours Served: 71,002

Senior Companion Program and RELIEF Program
Senior Companions: 58
Peers Served: 89
Hours Served: 47,973

Caregiver Programs (Support and Training)
Caregivers Served: 190

Social Services
Total Served: 1,369
(includes case management services, case aide service, screening and assessment for services and information and referral)

Council on Aging Volunteer Program
Volunteers: 310
Hours Served: 12,055

In Home Services
Persons Served: 480
(assistance with personal care needs, homemaking, respite and companionship)

PRIMARY SERVICES

Adult Day Health Care Center (The Retreat)

Provides a protective, stimulating environment for seniors with physical and cognitive impairments and much needed respite for caregivers. The center is the only licensed facility of its kind in the area. Meals and activities are supervised by specially-trained staff.

Case Management

Links clients and community resources to make independent living possible for seniors.

Senior Dining Sites and Recreational Activities

Hot, nutritious balanced lunches are served to seniors 60 and older at numerous locations, which also offer recreational activities and socialization opportunities.

Foster Grandparent Program

Provides income eligible seniors 55 and older the opportunity to earn tax-free stipends and other benefits while working with children in schools and other facilities.

Meals on Wheels

Balanced meals are delivered to homes of seniors requiring nutritional assistance.

Caregiver Support and Training

Training and support groups designed to reduce stress, increase coping skills and enable caregivers to effectively manage caregiving tasks.

Senior Center

To serve the needs of seniors in rural areas, we operate senior centers that provide recreational, educational and socialization opportunities.

Senior Companion Program

Provides income eligible seniors 55 and older the opportunity to earn tax-free stipends and other benefits while helping their peers remain in their own homes and giving respite to caregivers.

In Home Services

Assist eligible seniors 60 and older with activities of daily living through services such as personal care, homemaker, companionship and respite, which increases their ability to function independently in their own homes.