

ADMINISTRATION

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Vice President, Human Resources

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Director, Marketing
Communications

Brandi Gomez
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

2015 RAT PACK REUNION

Nearly 350 individuals attended the fifth annual Rat Pack Reunion on October 23, 2015 at New World Landing, in support of Council on Aging of West Florida and its programs. At the event, four local business leaders including McGuire Martin, Lumon May, Collier Merrill, and Charlie Switzer, were honored for their leadership and service to the community.

This year's Rat Pack Reunion tradition included the second annual Rat Race 5K in Downtown Pensacola. The gala and 5K raised more than \$100,000 for Council on Aging.



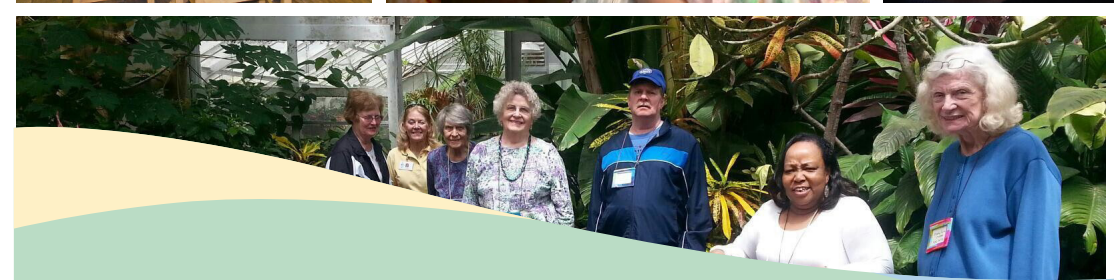
COMING OF AGE CELEBRATES 10 YEARS

This year marked 10 years of *Coming of Age* magazine and TV. To celebrate, the *Coming of Age* logo and magazine layout underwent a redesign. We were excited to also snag Al Roker for the 10th anniversary issue that was released June 2015.



COA HELPS SENIORS BEAT HEAT

With the help of local media, the community was alerted to the need of A/C units and fans for the elderly. Among the generous donors was Eddie Mercer, owner of Eddie Mercer Automotive, who donated 50 A/C units. Additionally, Central Credit Union donated 40 fans and \$200; Evan Bush, a high school student, raised more than \$1,700; Association of Monsanto Solutia Retirees donated \$1,000; American Legion Post 193 donated 5 A/C units; and many other individuals and businesses donated A/C units, fans and monetary donations totaling nearly \$10,000.



COMBINED STATEMENT OF ACTIVITIES

Year Ended December 31, 2014

Total Revenues.....	\$5,881,447
Program Service Expenses.....	\$4,895,947
Support Service Expenses	
Administrative Support.....	\$253,753
Fundraising Support.....	\$134,378
Total Expenses.....	\$5,284,078
Change in Net Assets.....	\$597,369
Net Assets at Beginning of Year.....	\$1,173,911
Net Assets at End of Year.....	\$1,771,280

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

ANNUAL REPORT 2015

COUNCIL ON
AGING
OF WEST FLORIDA, INC.

EST. 1972

Location: 875 Royce Street • Mailing Address: P.O. Box 17066 • Pensacola, FL 32522-7066
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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 and Community Service. 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.

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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.

OFFICERS

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First Vice Chair

Sonya Daniel
Second Vice Chair

Councilmember
P.C. Wu
Secretary

J.M. “Mick” Novota
Treasurer

DeeDee Davis
Immediate Past Chair

BOARD MEMBERS

- Lorenzo Aguilar
- Malcolm Ballinger
- Rabbi Joel Fleekop
- Thomas Lampone, M.D.
- Lois B. Lepp, P.A.
- Kathleen Logan
- Andy Marlette
- Escambia County
Commissioner Lumon May
- Chaplain Larry Mosley
- Thomas Pace, Jr.
- John Peacock
- Tara Peterson
- Diane L. Scott, Ph.D.,
Santa Rosa School Board
District I
- Monica Sherman
- Sue Straughn
- Edgar M. Turner
- Richard M. Tuten
- Dona Usry
- Marie K. Young

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- 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



What a privilege and honor it is to serve as Chair of Council on Aging of West Florida’s board of directors. This marks the end of my first year as Chair and, while there is still much to do, we have much to celebrate thanks to our dedicated staff, board, volunteers, donors and partner organizations.

Let’s take a look at why our community needs Council on Aging and why it is so important.

Unlike other diseases and chronic conditions, aging is something that we will all face; there’s no escaping it. Even if you are not personally impacted by the challenges of aging now, chances are good that at some point in time you will become either a formal or informal caregiver for an aging loved one, friend, relative, or spouse. In 1972, Council on Aging was created as an “umbrella” organization to provide an array of home and community-based services for elders and their caregivers in Escambia and Santa Rosa counties. These services and their impacts over the past year are described in this report. In many cases, the support we provide has meant the difference between a senior remaining in a familiar setting or having to be placed in a more restrictive living arrangement, such as a nursing home.

Apart from some of our more familiar programs and services, Council on Aging performs other critical functions that you may not be aware of. We serve as the agency that receives all high-risk referrals from State of Florida Adult Protective Services (APS)—assisting individuals who are at risk of further harm if they do not receive immediate home and community-based services. Council on Aging has also become the central point of contact during extreme hot and cold local weather, soliciting, receiving and distributing hundreds of fans, air conditioners, heaters and blankets to agency clients as well as others in the community. Performing these critical functions requires both a solid infrastructure and adequate funding to ensure we can continue to meet the needs of those we serve. It is the mission of the board of directors and staff to meet those needs.

It is the role of the board of directors to establish clear policies and guidelines for staff to follow and implement. During the past year, the board reviewed and updated an Executive Compensation Policy to ensure that salaries and benefits were in alignment with other agencies of similar size. The board, through its program committee, also reviewed and updated client satisfaction surveys and conducted a “process review” of agency programs. The finance and audit committee met on a regular basis to review the agency’s financial progress. The nominating and bylaws committee met to review board membership and nominate officers and directors for the coming year. The development committee met to establish fundraising goals and initiatives for the year. Just recently, the agency solicited proposals for its nutrition programs, and awarded a contract to Valley Services for the provision of senior dining site meals and home-delivered meals for the coming year. Next year, Council on Aging will engage a facilitator to lead the agency staff and board through a comprehensive strategic planning process as we prepare to look to the future of the agency.

In addition to establishing policy and procedures, the board of directors has been actively engaged in fundraising initiatives. Our signature fundraising event, the Rat Pack Reunion, continues to enjoy a successful run. At the conclusion of its fifth year, the event raised well over \$600,000 in private dollars to support the agency’s services. This year we also concluded our second Rat Race, a 5K event, which we believe will continue to grow in the coming years. These events are in addition to special fundraising appeals like our annual Circle of Friends campaign and end-of-year appeal. All of these help to provide critical funding for Council on Aging to support unfunded and underfunded services. While fundraising is critical to our agency, so is being a good steward of the funds we receive, and we pledge to always strive to be good stewards of these funds.

The accomplishments over the past year are the result of team work—from dedicated donors and funders, public and private, such as the Northwest Florida Area Agency on Aging/Aging Disability Resource Center, the Department of Elder Affairs, United Ways of Escambia and Santa Rosa counties, and our city and county governments (Escambia and Santa Rosa), as well as from countless volunteers, Council on Aging staff and generous community groups and individuals.

The success of Council on Aging continues to be made possible by the combined power of many who believe in the words of Albert Einstein, that “the value of a man should be seen in what he gives and not in what he is able to receive.” Please accept our deepest thanks for your willingness to give of yourselves in service of our elderly friends, neighbors and family members.



Sincerely, Caron Sjöberg

FACTS AT A GLANCE

Meals on Wheels
Participants Served: 453
Meals Served: 126,007

Senior Dining
Participants Served: 1,197
Meals Served: 96,754

Adult Day Health Care (The Retreat)
Participants Served: 76

Community Outreach
Total Reached: 2,073
(includes health fairs, senior expos, public speaking opportunities, etc.)

Foster Grandparent Program
Foster Grandparents: 61
Students Mentored: 228
Hours Served: 71,002

Senior Companion Program and RELIEF Program
Senior Companions: 40
Peers Served: 65
Hours Served: 41,766

Caregiver Programs (Support and Training)
Caregivers Served: 271

Social Services
Total Served: 1,803
(includes case management services, case aide service, screening and assessment for services and information and referral)

Council on Aging Volunteer Program
Volunteers: 209
Hours Served: 13,233

In Home Services
Persons Served: 300
(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.