



Aging & In-Home Solutions



2013 Annual Report

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content

Leadership2
 President’s Notes3
 History.....3
 Key Accomplishments.....4
 Audited Financial Statements5
 CICOA Donors6
 Tribute and Memorial Gifts8

leadership

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Orion H. Bell IV
President and CEO
CICOA Aging & In-Home Solutions

president's notes

How do you rate your community as a place to live?

In 2013, older adults in Central Indiana were asked that question in a survey conducted by the National Research Center on CICOA's behalf. The Community Assessment Survey of Older Adults identifies the needs of older adults and the community's strengths and weaknesses. Is this a good community to live in . . . to grow old in? Would you recommend it to others?

I am not a native of Indianapolis. My impressions of the community prior to moving here were formed from visiting the region on business over a 20-year period. Indy always left a good impression: a city with a vibrant downtown, excellent amateur and pro sports programs and successful efforts

at neighborhood revitalization. It is a community with excellent convention space and public venues. Central Indiana powered past most other Midwestern communities through effective public-private partnerships, strong local governance and civic leadership. Once I moved here, I also came to appreciate Indy for its livability. It's something that natives may sometimes take for granted, but life is pretty good in the Circle City and the surrounding metro area.

Indy's older adults think so, too. Most Central Indiana seniors rate the community highly as a place to live, and more than three-quarters would recommend it to others. Most plan to stay in the area through retirement.

There are areas for improvement. Older adults often struggle with normal activities of daily living. More than 60 percent report health needs. Many find it difficult to remain engaged in civic life. More than 40 percent have concerns about financial or legal issues. And more than one-third may struggle with meeting basic needs, including housing, transportation and healthcare.

The CASOA survey provided an opportunity for us to consider Central Indiana as a place to grow old. It is a roadmap for the future of aging services – a journey we can take together in our hometown.

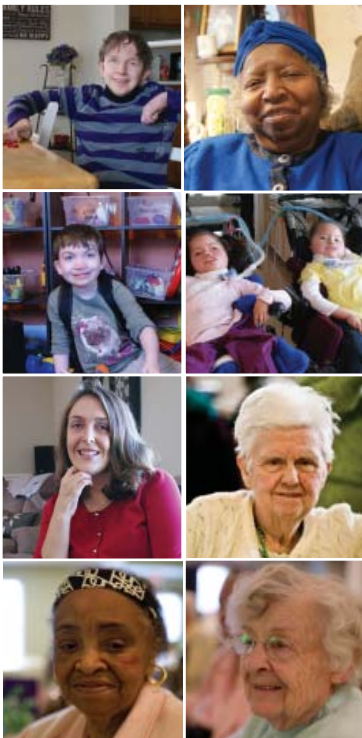
history

- ◆ The Signature Breakfast on April 18 raises over \$80,000, with 420 people attending.
- ◆ CICOA names JoAnn Fowler Combs as 2013 Caregiver of the Year.
- ◆ CICOA honors the Marion County Health Department with our Partner Award to recognize our strong working relationship.
- ◆ CICOA honors Geist Christian Church with the Spirit Award to recognize its long-term commitment to our mission.
- ◆ CICOA honors the Juanita Smith Foundation with its Impact Award. This Foundation has awarded CICOA a total of \$646,500.
- ◆ CICOA provides 900 farmers' market vouchers worth \$20 each to older adults.
- ◆ The meal voucher program expands to Major Hospital in Shelby County.
- ◆ CICOA names Bonnie Klingler of Lebanon, Ind., as the Central Indiana Senior Volunteer of the Year.
- ◆ CICOA holds an Area Plan Hearing inviting public comment on priority needs of older adults.

- ◆ CICOA gives away air conditioners and fans through its Cool Aid Project.
- ◆ CICOA's "I'm A Caregiver" commercial begins airing in February and runs through June on WTHR Channel 13. The ad encourages caregivers to contact CICOA for information and assistance.
- ◆ CICOA partners with Fair Housing Center of Central Indiana for the Central Indiana Accessibility Partnership Project for 2013.
- ◆ CICOA, with the Indiana Family and Social Services Administration and the Indiana Association of Area Agencies on Aging, conducts a Community Assessment Survey of Older Adults to learn about current and future needs of older adults in Central Indiana.



key accomplishments



CICOA Aging & In-Home Solutions is a private, not-for-profit agency and one of 700 Area Agencies on Aging nationwide. Established in 1973 by an amendment to the 1965 Older Americans Act and incorporated in 1974, CICOA is not a government agency, but oversees state and federal funds and private donations to provide information, advocacy and support services for older adults, people with disabilities and their caregivers.

CICOA is Indiana's largest Area Agency on Aging and serves Boone, Hamilton, Hancock, Hendricks, Johnson, Marion, Morgan, and Shelby Counties, where more than 26 percent of Indiana's population lives. In FY 2013 (July 2012-June 2013), CICOA and its network of for-profit and not-for-profit providers delivered the following services:

Aging & Disability Resource Center

- ◆ Handled 101,783 incoming and outgoing calls providing information and assistance.

- ◆ Conducted 3,488 telephone assessments.
- ◆ Referred more than 10,807 callers to other community resources.
- ◆ Participated in 266 health fairs and speaking engagements.
- ◆ Engaged 1,057 volunteers in 21,689 hours of community service.
- ◆ Logged 200,487 visits to CICOA's website and 133,307 visits to the Indy Creative Aging website.

In-Home Services

- ◆ Brokered in-home care management services, such as homemaker, home health aide and attendant care to 3,634 clients.
- ◆ Conducted 9,783 nursing facility preadmission screenings.
- ◆ Improved the transition of 568 individuals from inpatient hospital settings to other care settings through Care Transitions.
- ◆ Provided 37 fans and 40 air conditioners to members of the community through CICOA's Cool Aid Project.

Meals & More

- ◆ Delivered 513,677 meals in our eight-county area using CICOA drivers and volunteers.

- ◆ Served 399,151 home-delivered meals.
- ◆ Served 114,526 meals at neighborhood meal sites.
- ◆ Served 4,594 individuals in the eight-county area.
- ◆ Distributed 885 sets of farmers' market vouchers for fruits and vegetables.
- ◆ Expanded the community voucher program to a fifth hospital.

Caregiver Support

- ◆ Conducted 89 caregiver workplace presentations.

Lifelong Living Communities

- ◆ Completed 223 home modifications to enhance accessibility and home safety.
- ◆ Advocated for elder friendly communities with local area officials.
- ◆ Served 339 individuals through home accessibility modifications.

Transportation

- ◆ Issued 41,315 transportation vouchers to 958 persons.



empowers older adults,
those of any age with a disability
and family caregivers

TO ACHIEVE
the greatest possible

Independence,
DIGNITY
AND
Quality
OF Life.

audited financial statements

YEAR ENDED JUNE 30, 2013

CICOA Aging & In-Home Solutions, Inc.
and CICOA Foundation, Inc.
Combined Statements of Financial Position

REVENUE

Federal and state grants	\$13,580,837
Medicaid service fees	3,866,273
Project income	826,832
Contributions and grants	1,052,281
Fund raising events	81,662
Interest income	1,648
Gain on beneficial interest	60,554
Other income	75,629
In-kind contributions	547,338
	<u>20,093,054</u>
Net assets released from restrictions	-
Total Revenue	<u>\$20,093,054</u>

EXPENSES

Program services	
In-home services	\$8,571,460
Nutrition	4,284,711
Other	4,761,744
Total program services	<u>17,617,915</u>
Administration	1,293,138
Fund raising	242,185
Total expenses	<u>\$19,153,238</u>

Change in net assets 939,816

Net assets at beginning of year \$3,072,519

NET ASSETS AT END OF YEAR **\$4,012,335**

ASSETS

Cash and cash equivalents	\$2,123,120
Grant reimbursements receivable	3,457,049
Contributions receivable	17,075
Prepaid expenses	10,138
Beneficial interest in assets held by Central Indiana Community Foundation, Inc.	639,991
Property and equipment	486,502
	<u>\$6,733,875</u>

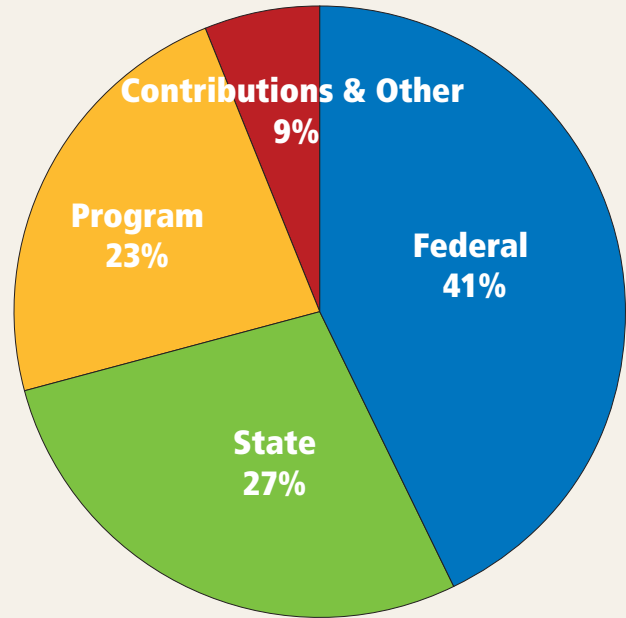
LIABILITIES AND NET ASSETS

Liabilities	
Accounts payable	\$1,879,383
Accrued payroll and expenses	156,957
Accrued leave	418,906
Due to funding source	266,294
Other liabilities	-
Total liabilities	<u>\$2,721,540</u>

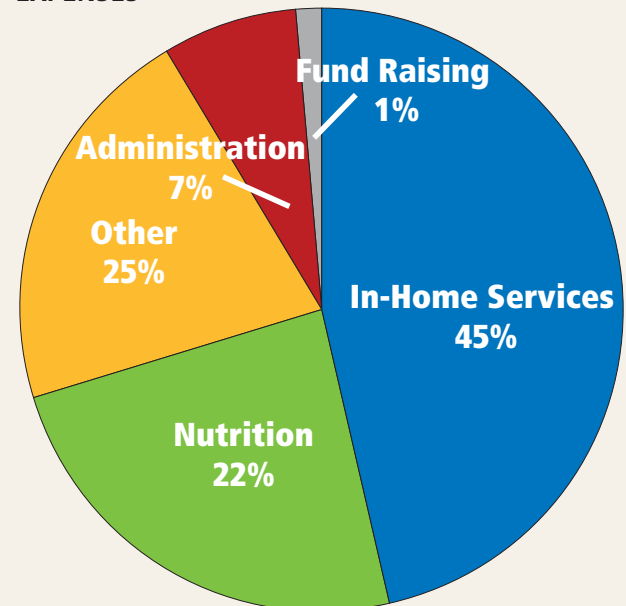
Net Assets

Unrestricted	\$3,046,914
Temporarily restricted	729,486
Permanently restricted	235,935
Total net assets	<u>4,012,335</u>
TOTAL LIABILITIES and NET ASSETS	<u>\$6,733,875</u>

SOURCES OF REVENUE



EXPENSES



A complete financial audit by independent auditors
Crowe Horwath LLP may be obtained on request.

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