envision
ANNUAL REPORT FY2019
why your gifts matter

CICOA
Aging & In-Home Solutions
A member of the connect Alliance.
why your gifts matter

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Aging & In-Home Solutions
A member of the connect Alliance.

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Mary Durell
Chief Operating Officer and 2019 Interim CEO

It may seem odd to talk about envisioning in an annual report. After all, annual reports look to the past, not the future.

But as I look back on the important milestones of 2019, I’m reminded that we can’t envision our past, present or future without you—our donors, volunteers, community partners and funders. We depend on you daily and are deeply grateful for the part you play. Thank you for choosing CICOA. Here’s a quick look at what YOU accomplished in 2019:

your gifts provide rides to essential needs

Through 46 years of marriage, Mike and Connie have shared many ups and downs, but they’ve experienced something that most couples don’t—they lost their vision together. This doesn’t stop them from enjoying an independent and active life, which has been enhanced through CICOA’s Way2Go transportation service.

“Way2Go allows us to go whenever and wherever we need, for appointments, errands, or to spend some time out together on a date with just the two of us and our Leader Dog, Friday,” said Mike. “That independence and freedom is such a blessing!”

Jean marched with Martin Luther King Jr., was the first African American to work in the chemistry lab at Methodist Hospital, put two sons through college, has been chased by the Klu Klux Klan, met four U.S. presidents, crusaded with Billy Graham, and buried all seven of her siblings. At 87, she said she’s starting to slow down.

She’s thankful for CICOA’s Meals & More service: “I have arthritis in my hands, so some days I just don’t feel like cooking. The meals really come in handy, and they are well balanced—everything I need. I really do appreciate all that you do.”

your gifts provide nourishing meals for seniors

your gifts make homes safer and more accessible

When Pearl worked at the Martindale-Brightwood Community Development Center, she used to help CICOA identify seniors who needed a helping hand. This year, she got a little help of her own during CICOA’s annual Safe at Home event.

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Lives You Have Touched

TOTAL DONORS: 822
FIRST TIME DONORS: 238

<table>
<thead>
<tr>
<th>Areas Supported</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>CareAware Fund</td>
<td>$1,000.00</td>
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<tr>
<td>CICOA Endowment Fund</td>
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<tr>
<td>CICOA Fund</td>
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<tr>
<td>Client Assistance Fund</td>
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<tr>
<td>Dementia Friends</td>
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<tr>
<td>Duane and Jewell Etienne Fund</td>
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<tr>
<td>Focus Fund</td>
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<td>Holiday Assistance Fund</td>
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<td>In-Kind Contributions</td>
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<td>Meals &amp; More Fund</td>
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<td>NAP Tax Credits</td>
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<td>Safe at Home</td>
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<tr>
<td>Pet Therapy</td>
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<tr>
<td>Volunteer Fund</td>
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</tr>
<tr>
<td>Way2Go Fund</td>
<td>$233,314.04</td>
</tr>
</tbody>
</table>

Total Giving $722,174.20

your gifts offer support and respite for family caregivers

Scott and Mandy describe August and September as “their season.” It’s an emotional time of year—their third son, Crew, was born in the month of August and died at the age of three in September. Every year they have a birthday party to celebrate his life.

Shortly after his birth, Mandy noticed that Crew had little interest in feeding and seemed lethargic. He was diagnosed with torticollis, in which the neck muscles contract, causing the head to twist to the side. By his first birthday, he also was diagnosed with blindness, low muscle tone, abnormal brain development, scoliosis, and epilepsy.

Crew needed coordinated and full-time care. CICOA provided care management and respite in the form of an in-home nurse.

“CICOA gave us the confidence to navigate everything better, and they helped lead us through the process,” Scott said.

your gifts empower continued growth

- In FY2019, CICOA’s Flourish care management services earned three-year accreditation by the National Committee for Quality Assurance.
- We hosted town hall meetings in each county to discuss findings from the Community Assessment Survey for Older Adults.
- We partnered with Conner Prairie to create the state’s first Memory Café for people with dementia.

As CICOA continues to envision a better future for Central Indiana, it’s rewarding to know that we have your full confidence as we move into that future. We couldn’t do this great work without you!
leadership

BOARD OF DIRECTORS
Officers
Anne DePrez, Chair
Anita Harden, Past Chair
Case Calvert, Secretary
Mike Brower, Treasurer
Peter Bisbecos, 1st Vice Chair
Kathy Frank, 2nd Vice Chair

Members
Joe Everett
Rev. Reginald Fletcher
Rev. David Greene
Elizabeth Heintzeleman
June Holt
Dr. Michin Hong
Kimberli Karmenzind
Art Logsdon
André Payne
Brianna Saunders
Michael Simmons
Matthew Seip

FOUNDATION BOARD
Officers
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Peter Ritz, Past Chair
Anthony Javorka, Secretary
Winnie Mechem, Treasurer
Gail Mitchell, Vice Chair

Members
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Jennifer Bolander
Kim Borges
Dr. Malaz Boustani
Anne DePrez
Mark Flesner
Laura Haynes
Dr. Tochukwu Iloabuchi
Wess Jackson
Dean Jones
John Kinman
Tony Lloyd
Jean Macdonald
Janice Roberts
Frank Runion

ADVISORY COUNCIL
Officers
Clifton Dennis, President
Patrice Hardy, Vice President
William Anderson, Secretary

Members
Phil Barrow
Miki Bean
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Sonja Buckner-Marion
Kay Burgess
Victoria Dowell
Linda Garrity
Beth Gehlhausen
Phyllis Graham
Sandra Hall
Sheryl Hamer
Dr. Donald Hay
Cory Hull
Tom Krughoff
Sue Lazar
Jake Maymon

CICOA SENIOR LEADERSHIP
Orion H. Bell IV, CEO
Beth Brown, VP, Human Resources
Susan Cornacchione, VP, Development
Mary Durell, COO, Interim CEO
Robert Woods, CFO
Dustin Ziegler, VP, Community Programs

grant-funded organizations

CICOA provided grants to the following organizations through the Older Americans Act:

Alzheimer's Association of Greater Indiana
Amount Awarded $18,394

Boone County Senior Services
Amount Awarded $47,085

Catholic Charities Indianapolis
Amount Awarded $55,265

Hancock County Senior Services
Amount Awarded $44,361

Hendricks County Senior Services
Amount Awarded $99,396

Heritage Place of Indianapolis
Amount Awarded $4,648

Indiana Legal Services
Amount Awarded $195,591.16

John H. Boner Community Center
Amount Awarded $51,215

Johnson County Senior Svrs.
Amount Awarded $54,902

Joy's House
Amount Awarded $35,122

Little Red Door Cancer Agency
Amount Awarded $28,294

Morgan County Connect
Amount Awarded $31,682

Primelife Enrichment
Amount Awarded $123,552

Shelby Senior Services
Amount Awarded $92,727

Still Waters Adult Day
Amount Awarded $11,363

The Villages of Indiana
Amount Awarded $25,825
YEAR ENDED JUNE 30, 2019
CICOA Aging & In-Home Solutions, Inc. and CICOA Foundation, Inc.
Combined Statements of Financial Position

REVENUE
Federal and state grants $14,980,060
Medicaid service fees 9,216,325
Project income 560,848
Contributions and grants 572,819
Fund raising events 165,087
Interest income 7,788
Gain on beneficial interest 35,311
Other income 609,313
In-kind contributions 443,635
Net assets released from restrictions -
Total Revenue $26,591,186

EXPENSES
Program services
In-home services $12,850,752
Transportation 1,536,755
Nutrition 3,760,994
Aging & Disability Resource Center 4,747,964
Other 826,068
Total program services 23,722,533
Administration 1,567,627
Fundraising 397,411
Total expenses $25,687,571

Change in net assets 903,615
Net assets at beginning of year $5,398,989

NET ASSETS AT END OF YEAR $6,302,604

ASSETS
Cash and cash equivalents $942,545
Grant reimbursements receivable 3,122,451
Medicaid service fees receivable 3,447,025
Contributions receivable, net 49,676
Other receivables 12,792
Prepaid expenses 81,963
Beneficial interest in assets held by Central Indiana Community Foundation, Inc. 852,157
Property and equipment, net 887,468
Total assets $8,748,601

LIABILITIES AND NET ASSETS
Liabilities
Accounts payable $1,160,576
Accrued payroll and expenses 513,115
Accrued leave 722,746
Due to funding source -
Other liabilities 49,560
Total liabilities $2,445,997

Net Assets
Unrestricted $4,620,849
Board Designated 435,116
Permanently restricted 1,246,639
Total net assets 6,302,604
TOTAL LIABILITIES and NET ASSETS $8,748,601

FY2019 REVENUE
1. State and Federal 56%
2. Program 37%
3. Other 7%

FY2019 EXPENSES
1. Care Management 50%
2. ADRC 19%
3. Nutrition 15%
4. Administration 6%
5. Other 3%
6. Transportation 6%
7. Fundraising 1%

A complete financial audit by independent auditors Crowe LLP is available on request.

MISSION
CICOA Aging & In-Home Solutions empowers older adults, those of any age with a disability and family caregivers to achieve the greatest possible independence, dignity and quality of life.

VISION
A Central Indiana community where older adults and those of any age with a disability flourish.
annual campaign

BUSINESSES AND FOUNDATIONS

Champion—$10,000+
Anonymous (1)
Central Indiana Senior Fund, a CICF Fund
CNX Financial Group
Comfort Keepers/Heal at Home
Hamilton County Community
Foundation, a CICF Affiliate
Indianapolis Neighborhood Housing Partnership
Morgan County Board of Commissioners
United Home Healthcare, Inc.
United Way of Central Indiana

Leader—$5,000+
Bugs B Gone
Care Institute Group, Inc.
Individual Support Services, Inc.
JLL
Eli Lilly and Company
Wal-Mart Public Affairs

Benefactor—$2,500+
12 Stars Media Productions
American Senior Communities
Anthem Blue Cross and Blue Shield
Anthem Foundation, Inc.
Banes & Thornburg, LLP
Caregiver Homes of Indiana
Crowe LLP
Eastern Star Church Care Center
Especially Kids Health & Rehabilitation
First Horizon Home Health Care
Grand Brook Memory Care
Health and Hospital Cooperation of Marion County
The Justus Family of Companies
Marion County Public Health Department
Nurses and More, Inc.
PMM Automotive Management, Inc.
Printing Partners
Strategic Capital Partners
TWG Development, LLC

Advocate—$1,000+
AARP Indiana
Capstone Retirement Group
Comcast
Comforcare Senior Service-N. Metro Indy
Cumberland Trace
Dove Printing Services, Inc.
EFF Management
Evenbrite, Inc.
Facebook Fundraisers
Flanner Buchanan
Forest Creek Village
Gallagher
Guardian Medical Monitoring, Inc.
Hendricks Regional Health
Herman & Kittle Properties, Inc.
Holwager & Holwager, Attorneys at Law, P.C.
Hoopeperood
Indiana Association of Area Agencies on Aging
Indianapolis Power & Light Company
InHouse Primary Care
Innovative Integration, Inc.
ITNAmerica
Jean Griswold Foundation
Joy Health Services, LLC
Law Office of Claire E. Lewis
Majoristic Care of Avon
The Mustard Seed of Central Indiana
National Government Services
Neyer Properties, Inc.
Neyers, Inc.
North Central Church of Christ
Oak Street Health
Options Behavioral Health Systems
Premeir Hospice & Palliative Care
Purpose of Life Ministries
Renuvations for Life, LLC
Second Presbyterian Church
Senior Check-In
Solutions2Biz
State Emergency Nurses Association
Touch of Love Home Care, LLC

Supporter—$500+
The WMD Fund, a fund of CICF
101 Mobility
Acme Health Services, Inc.
Active Day Indy South
Anthem Indiana Medicare
Bethany Village
CarDon & Associates
Chef for Hire, Inc.
Comforcare Home Care-S. Indy
Defur Voran LLP
George’s Family Pharmacy
Girl Scout Troop 447
Hancock Health
Humana
Independence Home Health LLC
Independent Adult Day Care Centers
IU School of Social Work
KayBee
Kit Media
LeadingAge Indiana
LUNA Language Services
Mauer Family Foundation
Pillar Group Risk Management
Seasons Hospics and Palliative Care of Indiana
Seniors Helping Seniors
Still Waters Adult Day Center
Together Homecare
Touchpoint Senior Services/Community Health Network
Williams Barnett & Willkoski, LLP
Witham Health Services

$100+
All Senior Citizens Connect
Alliance Home Health Care, LLC
AmazonSmile
Angels of Hope Home Agency
Anita A. Harden Elder Care Law Office
Applied Engineering Services, Inc.
At Home Health Services
The Benevolity Community Impact Fund
City of Martinsville
Clover Senior Care
Duke Energy Foundation
Geist Christian Church
Greenwood Village South
Hickory Creek at Franklin
Holy Name St. Vincent de Paul Society
Hoosier Beverage Association
Hosier Senior Solutions
Jackson Center for Conductive Education
Johnson County Senior Services, Inc.
Larris-JFY Home Care
Loving & Caring Home, Inc.
Meridian Medical Services
Otterbein Franklin Senior Life Community
ProGraphx, Inc.
Richmond Consulting LLC
Senior Helpers Indy
Senior Helpers, Heart in Home, Inc.
Signal Health Group
Southeastern Church of Christ
State Employed 1 Community Campaign
Synergistic Evolution LLC

West Side Village Health Center
YouCause, LLC
Zionsville Lions Club

Up to $99
Christ Presbyterian Church
Commiucare
Harbor Light Hospice
Home Safe Homes
Indiana State Police
Indiana University Health
Saint Luke's United Methodist Church
Sniderman Law
Washington
Wright & Associates, P.C.

SAFE AT HOME SPONSORS

Adaptive Nursing and Healthcare Services
Bugs B Gone
First Horizon Home Health Care, Inc.
Health and Hospital Corporation of Marion County
Heliecsen Senior Living of Indianapolis
Oasis at 30th-Gardant Management Solutions
Renuvations for Life, LLC
Together Homecare
United Home Healthcare, Inc.

SIGNATURE BREAKFAST SPONSORS

101 Mobility
12 Stars Media Productions
AARPP Indiana
Acme Health Services
Active Day Indy South
American Senior Communities
Anthem Blue Cross and Blue Shield
Anthem Indiana Medicare
Banes & Thornburg, LLP
Bethany Village
Bugs B Gone
CarDon & Associates
Chef Institute Group, Inc.
Caregiver Homes of Indiana
Chef for Hire, Inc.
Comforcare Home Care - South Indy
Comforcare Senior Service-N. Metro Indy
Comfort Keepers/heal at Home
Crowe, LLP
Cumberland Trace
Defur Voran LLP
Dove Printing Services, Inc.
Eastern Star Church Care Center
Especially Kids Health & Rehabilitation
First Horizon Home Health Care
Flanner Buchanan
Forest Creek Village
Gallagher
Guardian Medical Monitoring, Inc.
Hendricks Regional Health
Herman & Kittle Properties, Inc.
JLL
Joy Health Services, LLC
The Justus Family of Companies
KayBee
Kit Media
Law Office of Claire E. Lewis
LUNA Language Services
Majestic Care of Avon
Marion County Public Health Department
The Mustard Seed of Central Indiana
The National Bank of Indianapolis
National Government Services
Neyer Properties, Inc.
North Central Church of Christ
Nurses and More, Inc.
Oasis at 30th
Options Behavioral Health Systems
PMM Automotive Management, Inc.
Printing Partners
Purpose of Life Ministries
James and Rita Rosensteele
Seasons Hospice & Palliative Care of Indiana
Second Presbyterian Church
Senior Check-In
Seniors Helping Seniors
Solutions2Biz
Still Waters Adult Day Center
Strategic Capital Partners
Together Homecare
Touch of Love Home Care, LLC
United Home Healthcare, Inc.
Williams Barrett & Willkoski, LLP
Witham Health Services

INDIVIDUAL GIFTS

Champion—$10,000+
Mac Renfheild
Kenneth H. and Kristzina Inseep
Wessley Jackson

Leader—$5,000+
Anne DePrez

Benefactor—$2,500+
Orion H. Bell IV
Tony and Ange Lloyd
Drs. John and Wendy Kindig
Mary Ann and Gene Zink

Advocate—$1,000+
Anonymous-2
Rafik and Patricia Bishara
Beth Brown
Susan and Matt Connacockine
Mary Durell
Estate of Margaret Taylor Smith
Duane and Jewell Elten
Joseph H. Everett
Mark O. Flesner
Kim Garrett
Rev. and Mrs. David Greene
Dr. and Mrs. Robert Hoft
Drs. Tochuku & Eline Iloobuchi
Steve Ketterer
Billie Martin-Johnson
Tom and MaryAnn McKenna
Gail Dickson Mitchell
Lauren O’Neil
John Prather
David Redick
Jean and Lamar Richcreek