

ElderServe, Inc. Annual Report – July 1, 2013 – June 30, 2014

ElderServe empowers older adults to live independently with dignity.

Year in Review

- ElderServe’s Crime Victim Services helped 1,444 older adults
- ElderServe’s HomeCare Specialists provided more than 54,000 hours of in-home service
- ElderServe’s Social Services provided counseling, advocacy and case management to 285 older adults
- ElderServe’s TeleCare volunteers made more than 18,000 safety and reassurance calls to older adults
- Nearly 300 older adults participated in activities at the ElderServe Senior Center
- CATCH Healthy Habits worked with 7 community partners and 35 volunteers to reach 262 children
- The Friendly Visitor program was piloted as a new program.

ElderServe held its annual Champion for the Aging Award Luncheon on June 13, 2014. More than 300 attended the event where Cindy Venable was honored as this year’s Champion. Cathy Zion, owner and publisher of TODAY’S magazines served as Honorary Chair.

A new program, Friendly Visitors, was piloted that matched volunteers to isolated older adults in the community. The funding was received from the Humana Foundation. After a successful pilot, we continue to see how important this match of volunteers to isolated older adults can be to the community. In fact, we believe a big part of the solution to serving the growing number and needs of the community can be found in volunteerism and we are committed to making volunteerism an integral part of our programming. Friendly Visitor is the fourth agency program that is volunteer based. Others include TeleCare Reassurance, Catch Healthy Habits and Senior Companions.

In October 2013, Lucille Legget, age 94 and one of the members of the Oak and Acorn dance team won the UL Optimal Aging award.

ElderServe was recognized October 2013 for Community Engagement by the University of Louisville.

In February 2014, ElderServe signed a lease to move from our administrative offices at Dosker Manor. After serving the community from that location since 1968, an opportunity to move to the Atria Support Center, formerly known as The Nucleus Building was presented to the agency. The remainder of the fiscal year included a lot of planning and packing and a fundraising campaign to raise money to support the first six years of rent along with new technology. The move could not have taken place without the generous support of Atria Senior Living. Not only did the CEO of Atria Senior Living understand the importance of ElderServe to the community, he wanted to find a way to help us reach more people. He was willing to lead a financial campaign to make the move possible. What happened this past year was an incredible outpouring of support from individuals and the business community. In particular, senior living businesses stepped forward to support the move including Atria Senior Living, Almost Family, Elmcroft Senior Living, Kindred Healthcare, ResCare, Signature Healthcare, Trilogy Health Services and Ventas.

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JUNE 30, 2014

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Financial Report

July 1, 2013 through June 30, 2014

Support and Revenues

Grants and Contracts	1,505,143
Program Fees	459,826
Metro United Way support	252,994
Fund-raising	56,285
Contributions	359,439
Estimated value of contributed facilities	110,000
In-Kind Contributions	21,735
Investment Income	28,331
Realized gain (loss) on investment sale	26,846
Other revenue	5,600
Unrealized gain (loss) on investments	<u>47,226</u>
Total support and revenues	2,873,425

Expenses

Social services	1,785,466
Social development	<u>619,207</u>
Total program expenses	2,404,673
Administrative	151,750
Fund-raising	<u>99,618</u>
Total expenses	2,656,041

Change in net assets	217,384
Net assets, beginning of year	<u>1,375,975</u>
Net assets, June 30, 2014	<u>1,593,359</u>

A complete copy of our audited financial statements is available on request.