

**SOCIAL & VOLUNTARY SERVICES COMMISSION
FUNDING REQUEST**

LEGAL NAME OF AGENCY: Aging Services Inc.

MAILING ADDRESS: 1179 East Main Street

APPLICATION COMPLETED BY: Kathleen Wilson, ASI Exec. Director

TELEPHONE NUMBER: (405) 321-3200

EMAIL ADDRESS: k_wilson1221@yahoo.com

AMOUNT OF FUNDING REQUEST: **\$6,000**

IN WHAT YEAR WAS YOUR AGENCY INCORPORATED: 1988

ARE YOU ASSOCIATED WITH A NATIONAL ORGANIZATION: No

NUMBER OF VOLUNTEERS: Approximately 225 individuals

HOW MANY HOURS DO VOLUNTEERS DONATE:
Approximately 20,500 hours annually

HOW MUCH MONEY DO VOLUNTEERS SAVE THE AGENCY:
\$148,625 (at minimum wage rate of \$7.25)

HAS YOUR AGENCY APPLIED FOR SVSC FUNDS BEFORE: Yes

The Cleveland County Council on Aging (CCCOA) applied for SVSC funds in years between 1991 and 1996 to fund their Special Assistance Program. In 1996 CCCOA became inactive and turned the Special Assistance Program over to ASI. Since 1996, ASI has continued to apply for SVSC funding but not every year.

Year	<u>1991</u>	Amount <u>\$5,000</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>1992</u>	Amount <u>\$5,000</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>1993</u>	Amount <u>\$5,000</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>1994</u>	Amount <u>\$5,000</u>	Purpose <u>Special Assistance Program Funds</u>

Year	<u>1995</u>	Amount <u>\$5,000</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>1996</u>	Amount <u>\$3,400</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>1997</u>	Amount <u>\$2,000</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>1998</u>	ASI did not apply for funding that year	
Year	<u>1999</u>	Amount <u>\$1,100</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>2000</u>	Amount <u>\$4,550</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>2001</u>	Amount <u>\$3,000</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>2002</u>	Amount <u>\$2,500</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>2003</u>	Amount <u>\$1,500</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>2004</u>	ASI did not apply for funding that year	
Year	<u>2005</u>	ASI did not apply for funding that year	
Year	<u>2006</u>	ASI did not apply for funding that year	
Year	<u>2007</u>	Amount <u>\$3,000</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>2008</u>	Amount <u>\$3,000</u>	Purpose <u>Special Assistance Program Funds</u>
Year	<u>2009</u>	Amount <u>\$3,000</u>	Purpose <u>Special Assistance Program Funds, Food Pantry and DME Lending Closet</u>
Year	<u>2010</u>	Amount <u>\$3,000</u>	Purpose: <u>Special Assistance Program Funds and Food Pantry</u>
Year	<u>2011</u>	Amount <u>\$3,000</u>	Purpose: <u>Special Assistance Program Funds and Food Pantry</u>
Year	<u>2012</u>	Amount <u>\$4,000</u>	Purpose: <u>Special Assistance Program Funds and Food Pantry</u>
Year	<u>2013</u>	Amount <u>\$4,000</u>	Purpose: <u>Special Assistance Program Funds and Food Pantry</u>
Year	<u>2014</u>	Amount <u>\$4,000</u>	Purpose: <u>Special Assistance Program Funds and Food Pantry</u>

FINANCIAL INFORMATION FROM THE LAST FISCAL YEAR:

Percent of the budget which is spent on fund-raising:	<u>0%</u>
Percent of your budget spent on programs:	<u>87%</u>
Percent of your budget spent on administrative expenses:	<u>13%</u>

PERCENTAGE OF ORGANIZATIONAL FUNDING:

Religious Organizations	<u>0%</u>	
Civic Clubs	<u>0%</u>	
Corporate Donors	<u>0%</u>	
Endowment/Interest Income	<u>0%</u>	
Fees for services/products	<u>3%</u>	(Contract Meals)
Government Grants	<u>32 %</u>	
Government Contracts	<u>51 %</u>	
Individual Donors	<u>0%</u>	
Private Foundations	<u>0%</u>	
Special Events (based on net earnings)	<u>0%</u>	
United Way	<u>.01%</u>	
Other	<u>13.99%</u>	(Participant Donations, Civic clubs, Special Events, Interest)

OVERALL MISSION OF AGENCY

The mission of Aging Services Inc. (ASI) is to enhance the lives and dignity of Cleveland County senior adults by providing programs, services and referrals that assist and promote healthy independent living. ASI has been working to help senior adults in Cleveland County for 39 years. ASI is a private, nonprofit organization, incorporated in 1988.

Clients served by ASI are senior adults aged 60 years or older. It is estimated that 12,300 individuals/12% of the population in Norman are in this group and that at least 30% of the senior adults are living at or below poverty level. ASI offers the following services and programs in the Norman area:

Transportation – Transportation is available on ASI's *Kiwanis Kruiser*, a wheelchair lift equipped van. Rides are available on a demand-response basis, Monday through Friday from 8:15am until 4:00pm in the greater Norman area only.

Congregate Meal Sites – Two of the five congregate meal sites operated by ASI are located in the Norman area, the Norman Senior Center at 329 South Peters and Rose Rock Villa at 700 North Berry. At these sites as well as the other three sites across Cleveland County, a lunch meal is provided to senior adults as well as an opportunity for socialization and participation in educational programs.

Home Delivered Meals – ASI delivers meals on a Monday through Friday basis to homebound senior adults living in Cleveland County. ASI refers requests in the Norman area to the Meals on Wheels program to avoid duplication of services.

Housekeeping Services – Housekeeping assistance is offered to frail senior adults with health limitations.

Outreach – Outreach workers conduct home visits to provide information on ASI, assess needs and make referrals to programs both within ASI and in the community.

Respite Voucher Program – This **NEW** program allows ASI to issue vouchers for respite care to full-time live in care givers caring for either seniors adult or individuals with Alzheimer's/dementia or grandparents raising grandchildren.

Advantage Case Management – ASI administers a Case Management program for qualified individuals on Oklahoma's Medicaid Waiver Program/Advantage Program. This program allows an individual to remain living at home while receiving assistance from a combination of formal and informal services.

DME (Durable Medical Equipment) Lending Closet - This program provides clients with the loan of DME when the need arises.

Summer Fan Program – This program provides clients with a large box fan to help with the summer heat. It is sponsored by O.G.&E.

SOS Food Pantry – Emergency food pantry supplies for senior adults in need.

Special Assistance Program – This program provides direct assistance to senior adults. The programs allows ASI to award up to \$100 one time per year to benefit senior adults who have a documented need for items that are not covered by insurance or other programs in our service area.

SPECIFIC PROJECT FOR WHICH FUNDING IS BEING REQUESTED

For FY2015, SVSC funding of \$6,000 is requested for the ASI Special Assistance Program.

The Special Assistance Program will directly assist approximately 60-70 senior adults with unmet needs who are living within the Norman city limits. The program will help senior adults with a bona fide need and no ability to pay from personal funds. Over this past year, ASI has continued to see assistance with utility bills as the most frequently requested assistance. During FY14, ASI helped 28 Norman residents pay a total of \$2,615.88 towards their utility bills. Seniors needed to ask for this assistance in spite of the fact that winter and the summer were relatively mild this past year. The second most requested assistance is help with eye exams and glasses. ASI helped 15 Norman residents with eye exams and glasses for a total expenditure of \$1,000.00. An additional 11 Norman residents were helped with a variety of miscellaneous expenses such as rent assistance, wheel chair batteries, moving, dental work, etc. for a total of \$1,149.56. For FY14, Aging Services Inc. spent a total of \$4,765.34 assisting 54 senior adult residents in Norman. This compares with a total of \$3,188.48 was spent to aid 44 Norman residents during FY13.

Some needs addressed by the program are addressed by other agencies such as the Salvation Army for utility assistance or Health for Friends for dental assistance. But, funding for these programs is limited and not always available.

The need for special assistance is identified in two ways. Usually the need is identified by an ASI Outreach Worker who is calling on a senior adult to determine their eligibility for services/programs or by other ASI employees who have occasion to be aware of senior adults who need assistance. Other times, a senior adult will contact the ASI office and request assistance. In all cases, an outreach worker will visit the home of the senior and conduct an assessment of their physical/environmental needs and their financial situation.

If the assessment verifies the individual can't afford to pay for the need or item from their own financial resources, the Outreach Worker will complete a Special Assistance Request. The Special Assistance Fund can assist the individual up to \$100 one time each calendar year. For couples, the assistance is a maximum of \$200. ASI has negotiated a below market rate with providers in the area to give ASI the ability to make the funds go further. Payment is made directly to the provider, not to the individual awarded the funds.

When the senior adult has some financial means ASI asks the senior to cover a portion of the expense or may simply allow the senior to use the ASI negotiated rate and cover the expense entirely from their own finances.

The ASI Executive Director and the ASI Case Management Supervisor review each request on a case-by-case basis. The review includes discussion of the request; review of the financial assessment; and when the individual was last helped by the ASI program. Copies of the Assessment Forms and Special Assistance Request Forms are attached.

All SVSC funding for our Special Assistance Program will be used exclusively for direct assistance to senior adults. There are no administrative overhead or other expenses included in the grant request or the grant budget.

The ASI SOS (Stock Our Shelves) Emergency Food Pantry was developed because our outreach workers and case managers frequently encountered senior adults that had virtually no food in their homes. At this time, Saint Mark's Catholic Church is helping keep our pantry stocked so ASI is NOT requesting support from the Social and Volunteer Service Commission Grant for FY15. During FY14, ASI spent a total of \$165.84 on food products for the pantry from SVSC funds.

The ASI Durable Medical Equipment/DME Lending Closet was awarded \$500 several years ago from a SVSC grant. ASI has found that there are very little costs associated with operating the lending closet and is therefore not requesting any further assistance from the SVSC for this program at this time.

FINANCIAL INFORMATION

Internal evaluation includes audits conducted annually of the OAA Title III program and every 2-3 years by the OK-DHS for the Advantage Case Management Program. There is separation of duties, per the auditor, for all financial dealings for the size of the ASI program's staff. All checks must be accompanied with documentation, approved by the Executive Director and require two signatures if over \$500. All Title III records are maintained for 5 years, as required. All Advantage records are maintained for 7 years, as required. Program evaluations, policies and procedures adhere to (1) Areawide Aging Agency, (2) Older Americans Act – Title III, (3) DHS Aging Services Division-State of Oklahoma and (4) the Advantage Medicaid Waiver Program. There is a daily, weekly, monthly, quarterly, and annual tracking process in all areas of our funded programs and annual assessments, reviews and/or audits.

The Special Assistance Program Funds are maintained in a separate checking account. All checks require two signatures and no checks are written until the Special Assistance Request Form has been signed and the expenditure is approved and authorized. ASI keeps these funds in a separate account to allow for fast action as in many cases the Special Assistance Request is made on an emergency basis and action needs to be taken quickly.

During FY14, ASI experienced sequester cuts for the Title III program and the Respite Voucher program but was able to continue operating without implementing waiting lists for any services except Housekeeping. FY14 was the last year that ASI was able to apply for CDBG support from the City of Norman. During FY14, ASI was awarded a \$20,000 grant from AARP for Disaster Recovery assistance after the tornados struck in the Cleveland County area in May of 2013. These funds were used to assist residents in the Harrah Newalla and Pecan Valley areas through the Eastern Cleveland County Long Term Recovery Committee.

For FY15, Title III/Older American Act funding levels remained basically level. Funding from United Way of Norman was decreased from \$25,000 to \$21,500 due to campaign short falls. The most notable change in the ASI budget for FY15 relates to the ADvantage Meal Contract for Cleveland County. For the ten years, ASI has been the exclusive provider of meals for Advantage members who reside in Cleveland County. As of 7/01/14, three other food vendors are now operating in Cleveland County and providing meals to ADvantage members. The final impact of this change is still unknown at this time but so far, the loss of meal clients under this contract is not as dramatic as was feared. ASI has continued efforts to raise additional funds from our annual Gingerbread House Competition event held in Moore each year but for FY15, a new fund raising effort is under development. After factoring in all these changes, **the percent of change from the actual year end FY14 revenues to the Projected FY15 budgeted revenues is -1%.**

Required Attachments to this application:

Narrative describing Overall Mission of Agency

Narrative describing Specific Project for which Funding is being requested

Financial Information as previously outlined

Budget summary and projected budget

Copy of most recent Audit

Copy of IRS tax exempt status letter or your application for tax exempt status

List of current board members including names and professions

List of current staff members and their position titles