

2023

# ANNUAL REPORT

council on aging

Living Better, Together



# ABOUT COUNCIL ON AGING



## OUR MISSION

To enhance the quality of life for our aging community by providing services that promote well-being and maintain independence.

## WHO WE ARE

Council on Aging is a private 501(c)(3) nonprofit organization that has been providing services for Sonoma County seniors and their families since 1966.

## OUR CORE VALUES

We are driven by compassion and commitment to service.

We commit to excellence in everything we do.

We demand integrity...at all times everywhere.

We anticipate, create, and innovate.

We work as a team with respect, trust, and humor.

## WHO WE SERVE

Council on Aging serves older adults 60+ who live in Sonoma County and their families. We receive inquiries from seniors needing services, and referrals from concerned neighbors, physicians, attorneys, caregivers, and other agencies.



# A MESSAGE FROM OUR PRESIDENT & CEO



*Marianne McBride*

## Board of Directors

Corrine Lorenzen, Board Chair  
John Reyes, Treasurer  
Bonnie Burrell, Vice Chair  
Frank Pugh, Past Chair  
Karen Lewis, Board Secretary  
Marianne McBride, President & CEO  
Joseph Huang, Board Member  
Dr. James Devore, Board Member  
John Pearson, Board Member  
Leslie Brutocao, Board Member

## Executive Management

Marianne McBride, President & CEO  
Sue Tasselmyer, Controller  
Bill Govan, Dir. of Culinary Operations  
Rachel Jones, Dir. of Development  
Denise Johnson, Dir. of Nutrition & Health Services  
Jamie Escoubas, Dir. of Social & Fiduciary Services

Over the past year, the Council on Aging has experienced both triumphs and challenges. We successfully secured four grants, which enabled us to launch three new programs and begin offering Medi-Cal reimbursed services. These new initiatives include:

- **Alzheimer's Day Respite Program:** This program offers up to five days of respite per week for caregivers of older adults with advanced Alzheimer's.
- **Evidence-Based PEARLS Program:** This program supports older adults in creating happier, healthier lives.
- **Intergenerational Program:** This pairs young adults with older adults for shared meals and activities, including the creation of life story Legacy books.

Thanks to infrastructure grants from the Counties of Sonoma and Marin, we made key investments that improved our operations and reduced expenses. This included purchasing two electric cargo vans, an oversized refrigerated van, and an electric car for meal deliveries, which has decreased our fuel costs. Additionally, we upgraded our commercial kitchen with a new steamer, dishwasher, and tilt skillet to enhance efficiency.

Despite these advancements, we faced record increases in food, packaging, staffing, and fuel costs, while funding remained stagnant and is expected to decrease in the coming year. The demand for Meals on Wheels and meal pick-ups through our Drive-Up Pick-Up sites continued to grow. Simultaneously, client donations have significantly declined, reflecting the financial strain on seniors living on fixed incomes.

Thanks to the generosity of individual and corporate donors, special event supporters, foundations, grants, and government contracts, we have been able to address these local needs. As we face increasing challenges in the future, the Council on Aging remains committed to our mission of identifying necessary resources and building local partnerships to continue serving our seniors and their families, as we have done for the past 58 years.

**Marianne McBride, President & CEO**



# OUR PROGRAMS

## PEARLS PROGRAM EXT 139

(Program Offered in Spanish)

Program to Encourage Active, Rewarding Lives for Seniors. This FREE program assists older adults to create a happier, healthier, and a better quality of life through skill-building, problem-solving, and physical activity.

## ALZHEIMER'S AND ADULT DAY RESPITE PROGRAMS EXT 103

Programs designed to support persons living with dementia/memory loss and their caregivers. Participants engage in physical, mental, and social activities and enjoy a nutritious lunch while providing a much-needed break and respite for caregivers. Locations: Santa Rosa, Sonoma, Sebastopol. \*Café de los Recuerdos (Memory Cafe) coming soon.

## SENIOR PEER SUPPORT EXT 106

An in-home program implemented by trained volunteers who provide emotional and social assistance to seniors struggling with various mental health issues. All volunteers are supervised by a licensed mental health clinician.

## FAMILY JUSTICE CENTER

An elder advocate program based out of the Family Justice Center that provides support and care coordination for seniors 60+ that may be experiencing elder abuse who are referred through the system.

## LUNCH AND LEARN EVENTS EXT 119

Engage with other seniors while enjoying lunch and learning about important topics such as Emergency Preparedness, Brain Health, Mental Health, and much more.

## VOLUNTEER EXT 121

If interested in volunteering for any of these positions, contact our Volunteer Coordinator.

- Board Committee
- Senior Peer Support
- Alzheimer's Day Respite
- Kitchen Support
- Drivers
- PEARLS Program
- Tellegacy Program
- Special Events
- Community Dining

## MEALS ON WHEELS EXT 135

Meals on Wheels provides heart healthy, low-sodium meals to seniors 60+ who are homebound and do not drive. Participation in the program can either be short or long-term. Each meal provides one-third of the daily calorie and nutrition needs seniors require per day and includes poultry, vegetarian, beef, pork, or fish options. With each meal delivery, there is a wellness check to ensure the safety and well-being of the client.

## THE COMMUNITY TABLE EXT 104

The Community Table provides seniors 60+ the opportunity to enjoy healthy and nutritious meals at various sites throughout Sonoma County while enjoying the company of other seniors. All meals are heart-healthy, low-sodium, and provide one-third of the nutrition needs seniors require per day.

## DRIVE-UP PICK-UP (DUPU) EXT 121

The DUPU program provides frozen meals, milk, and fruit to seniors 60+ who still drive. There are several pick-up sites located throughout Sonoma County. All meals are heart-healthy, low-sodium, and provide one-third of the nutrition needs seniors require per day.



(Left to Right) Celia, Rosa, Lulu



# OUR PROGRAMS



*Rhonda Boczon, Head Chef*

*Gail G. from Austin, TX arranged Meals on Wheels for her brother, Mark in Santa Rosa. Initially skeptical about Mark's habits and health challenges, Gail was pleasantly surprised by the program's reliability and kindness. Mark appreciates the convenience of having meals delivered and is eating regularly. He was deeply touched when Meals on Wheels delivered a Christmas Eve surprise—moccasin slippers and a \$50 gift card. His gratitude moved Gail, and she acknowledged the program's support in caring for her brother from afar, easing the challenges of long-distance caregiving.*

*– Gail. G.*

## **TELLEGACY AND LUNCH COMPANION PROGRAM EXT 129**

The Tellegacy and Lunch Companion program fosters connections by facilitating shared meals and meaningful conversations. Through these interactions, we aim to enhance seniors' sense of purpose and community, enriching their lives with companionship and engagement.

## **FIDUCIARY SERVICES EXT 108**

Council on Aging can be named in your estate planning documents as your fiduciary for Successor Trustee, Power of Attorney for Finance, and as Agent for your Advanced Health Care Directive.

## **KIBBLES OF KINDNESS EXT 135**

Participants in any of our meal programs can also receive pet food for their dog or cat under the Kibbles of Kindness Program.

## **SONOMA WINE COUNTRY GAMES EXT 121**

The Sonoma Wine Country Games occur annually in June and exist to promote and support active aging for people 50+. Through spirited competition, athletes develop healthy lifestyle practices and maintain social connections with other participants. For more information, visit [councilonaging.com/wine-country-games](http://councilonaging.com/wine-country-games).

## **SPEAKERS BUREAU EXT 100**

Speakers are available to provide presentations about available Senior Services, Healthy Aging, and Age Friendly Sonoma County.



*Shannon Holck, Meals on Wheels Fleet Manager*



# STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

## Council on Aging Services for Seniors

### Statement of Activities and Changes in Net Assets

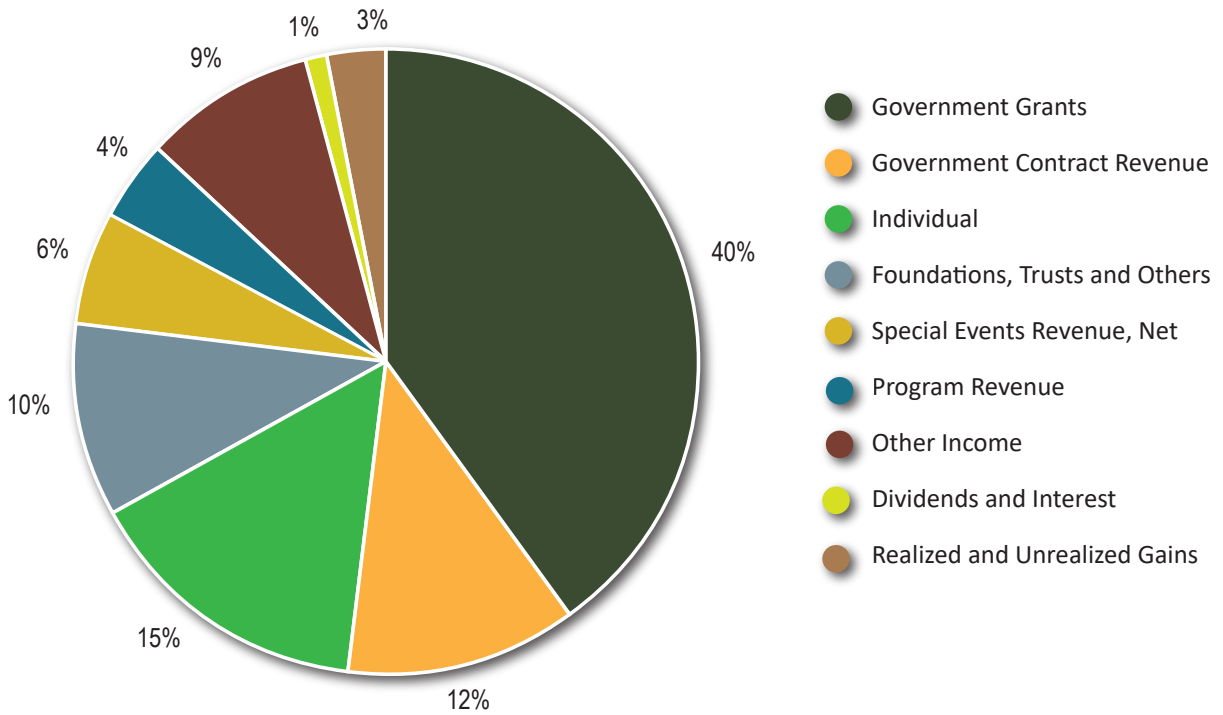
For the Year Ended June 30, 2023

Audited	<u>Net Assets Without Donor Restrictions</u>	<u>Net Assets With Donor Restrictions</u>	<u>Total</u>
Support and Revenue			
Public Support			
Government Grants	\$2,712,880	\$ -	\$2,712,880
Government Contract Revenue	786,905		786,905
Individual	1,055,799		1,055,799
Foundations, Trusts, and Others	697,851		697,851
Special Events Revenue, Net	434,525		434,525
Total Public Support	<u>5,687,960</u>	<u>-</u>	<u>5,687,960</u>
Other operating revenue			
Program Revenue	279,027		279,027
Other Income	606,128		606,128
Dividends and Interest	95,484		95,484
Realized and Unrealized Gains	200,485		200,485
Net Assets Released from Restriction	756	(756)	-
Total Other Operating Revenue	<u>1,181,880</u>	<u>(756)</u>	<u>1,181,124</u>
Total Support and Revenue	<u>6,869,840</u>	<u>(756)</u>	<u>6,869,084</u>
Expenses			
Program Services			
Home Delivered Meals	2,626,408		2,626,408
Congregate Dining	720,695		720,695
Adult Day Care Services	206,865		206,865
Alzheimer's Day Program	112,340		112,340
Financial Services	337,049		337,049
Case Management	226,955		226,955
Other Program Services	277,492		277,492
Total Program Services	<u>4,507,804</u>	<u>-</u>	<u>4,507,804</u>
Supporting services			
Management and General	1,030,405		1,030,405
Fundraising	516,463		516,463
Total Supporting Services	<u>1,546,868</u>	<u>-</u>	<u>1,546,868</u>
Total Expenses	<u>6,054,672</u>	<u>-</u>	<u>6,054,672</u>
Changes in Net Assets	815,168	(756)	814,412
Net Assets, Beginning of Year	<u>8,756,011</u>	<u>103,117</u>	<u>8,859,128</u>
Net Assets, End of Year	<u>\$9,571,179</u>	<u>\$ 102,361</u>	<u>\$9,673,540</u>

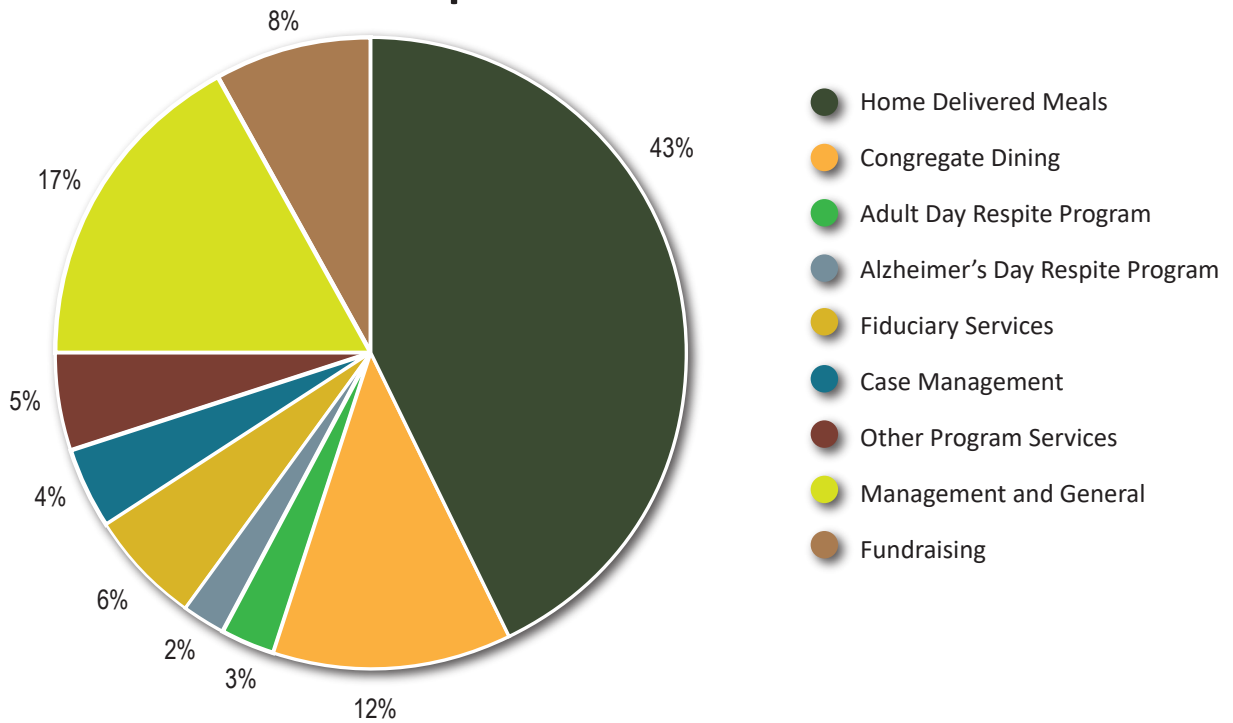


# STATEMENT OF ACTIVITIES CHARTS

## Support and Revenue



## Expenses



# NUTRITION IMPACT



## MEALS ON WHEELS **180,554**

### MEALS SERVED

This program offers home delivered meals to seniors who are 60+, homebound, and do not drive.

## DRIVE UP PICK UP **52,295**

### MEALS SERVED

This program offers seniors who are 60+ and still drive, meals that can be picked up.

## COMMUNITY DINING **21,882**

### MEALS SERVED

This program offers seniors who are 60+ the opportunity to sit and dine with other seniors at any of our dining sites.

## TELLEGACY AND LUNCH COMPANION PROGRAM

## **32**

### CLIENTS

This program pairs seniors who are 60+ and experiencing isolation and loneliness with a lunch companion.





# FINANCIAL, HEALTH, AND MENTAL WELL-BEING IMPACT



RESPITE CARE  
**9,852**  
HOURS

Alzheimer's and Adult Day Respite Programs provided care and support for 140 seniors living with dementia and their caregivers.

VOLUNTEERS  
**14,607**  
HOURS

Our dedicated volunteers donated their time which was valued at \$299,194.

PEARLS PROGRAM  
**322**  
SESSIONS

We enrolled 50 clients in the PEARLS Program which encourages Active, Rewarding Lives for Seniors.

FIDUCIARY  
**70**  
CLIENTS

Fiduciary services acted as Successor Trustee and Power of Attorney for health and finance for clients with combined funds totaling \$17,000,000.

SONOMA WINE  
COUNTRY GAMES  
**840**  
PARTICIPANTS

We held an annual tournament with six different sports for people 50 and older.

ELDER ADVOCACY  
**500**  
CLIENTS

We provided support and care coordination for seniors 60+ referred through the system who may be experiencing abuse.



# HOW YOU CAN HELP: YOUR LEGACY MATTERS



*Once you have made the decision to include a gift to charity in your estate plans, there are several options to choose from. In addition to an outright gift, there are planned giving options, such as a trust arrangement that benefits your surviving spouse, to a bequest in a will, or a gift with tax advantages that provides income for your family.*

## **BEQUESTS BY WILL OR TRUST**

By far the most popular means of gift planning, many donors find that a will or trust is the most convenient way of benefitting the community, perpetuating their generosity, and is an effective way to reduce estate taxes. You may stipulate a specific bequest amount or a percentage of your estate.

## **CONTINGENT BEQUESTS**

Most people have family obligations which are their primary motive for executing a will. An ideal plan might include a contingency providing, in case family or friends predecease you, that the estate is directed to benefit your charity.

## **CHARITABLE REMAINDER TRUST**

Assets are placed in a trust, the earnings from which are paid as income to you and your beneficiaries. Upon the death of the last beneficiary, the principal goes to your charity.

## **CHARITABLE LEAD TRUST**

Assets are placed in a trust, for a specified period of time. Income from the principal goes to your charity during the life of the trust. The principal goes to your beneficiaries when the trust terminates.

## **REAL ESTATE**

Gifts of appreciated real estate may provide tax savings and a sizable gift to your favorite charity. In addition, arrangements can be made whereby you may retain use of the property for the rest of your life.

## **IRA AND RETIREMENT PLANS**

You can designate Council on Aging as primary or secondary beneficiary of your IRA or retirement plan.

## **LIFE INSURANCE**

There are a number of ways you can use existing life insurance policies as a means of giving to a charity. Insurance policies initiated in the past may no longer be needed for family security. The gift of a paid-up policy may result in a substantial tax savings.

## **STOCK**

Gifts of stock are a convenient way of giving gifts of appreciated securities, while enjoying additional tax savings.

**FOR MORE INFORMATION ON THESE PLANS, CONTACT  
Marrienne McBride • 707-525-0143 x111  
[mmcbride@councilonaging.com](mailto:mmcbride@councilonaging.com)**



## WHAT OUR CLIENTS HAVE TO SAY

*"Your staff's skill, warmth and caring allow my wife (with Alzheimer's) to feel at ease, valued, and connected to others—feelings she rarely has elsewhere!" – J.C., Whose wife is enrolled in the Alzheimer's Day Respite Program in Sebastopol*

*"I want to thank you and everyone at COA for all the help with my mother, especially during the last two years of her life. Without the support of your fiduciary team, a difficult situation would have been a lot worse. Your team made sure she was properly cared for in the end and for that, I am eternally grateful." – C.B.*

*A.G., struggling with depression and feeling hopeless, joined the Program to Enhance Active Rewarding Lives for Seniors (PEARLS) with her daughter's support. A.G. describes PEARLS as a comforting program where a coach visits regularly, offering guidance without judgment. The structured sessions have helped A.G. clarify goals and find solutions independently. Rather than giving answers, the coach facilitates understanding. A.G.'s progress led to a sense of control over challenges, transforming overwhelmed feelings into solvable issues. Now A.G. focuses on mental wellness, staying active, meditating, volunteering with children, exploring great novels, and finding more joy compared to last year.*

*"The program, the people, the participants are wonderful! It gets my mom out of the house. She looks forward to it—it is the bright spot in her week, and I get much needed time away." – S.M. Whose mother is enrolled in Adult Day Respite in Santa Rosa*

*"COA allowed me to talk about things that were going on. It felt like someone finally acknowledged that I was more than my victimization." – R.N.*

*Margaret likes to come and try out new foods. As a single person on a fixed income, she cannot afford fresh fruit and milk without waste. She appreciates the supplement to her expenses and the bonus of bonding with her community.*

*While looking through her completed legacy book, J.P. expressed her gratitude and reflected on her experience in the program, saying, "It made me feel like my life is worthwhile, and it has been—every minute of it. The good times, as well as the bad." – J.P.*

*Ben T. and his wife, Anna have been enrolled in the Drive-Up Pick-Up (DUPU) program since it started in 2020. He suffers from both physical and mental health issues and has been experiencing chronic pain which affects his appetite. He recently visited his doctor for his annual physical and received great news; he had turned his health around! He attributes this to eating the nutritious food provided by the DUPU program which caused him to gain the right weight and feel stronger. His mental health has improved as well, he claims the smiling faces who greet him each week when he picks up his food and checks in on him make such a difference.*

*Pets are both loyal companions and a tremendous responsibility for seniors like Dawn, who are often isolated at home and living on a fixed income. Even the basics, like food, can be a burden. Too often, seniors must choose between feeding their pets and paying their bills. Nearly one-third of Meals on Wheels clients with pets forego their own medical care and personal needs to provide for their furry friends. Kibbles of Kindness provides monthly pet food for Meals on Wheels clients who cannot afford to buy it. "On most days, my pets are my only companions. My favorite thing is that they love me. They not only keep me company, they keep me moving." – R.J.*



*Supporting our Seniors, Our Community, Our Future*



# MANY THANKS TO OUR 2023 SPONSORS

**Kaiser Permanente**  
**BiRite Foodservice Distributors**  
**Western Health Advantage**  
**Graton Resort & Casino**  
**Veale Outdoor Advertising**  
**Villa Capri**  
**Varenna**  
**Treasure House**  
**Summit State Bank**  
**Sonoma Clean Power**  
**Sudha R. Schlesinger**  
**Luther Burbank Savings & Loan**

**Eagle Distributing Co.**  
**Community First Credit Union**  
**Century 21 EPIC Valley of the Moon**  
**Canopy Health**  
**Providence**  
**Poppy Bank**  
**Exchange Bank**  
**2nd Wind Printing**  
**Recology**  
**Viavi Solutions**  
**SEG-REG**  
**At Home Nursing**

