

## 2020 Budget Request Form – Douglas County, KS

### Summary and Community Partner Overview

Community Partner:	<b>Senior Resource Center for Douglas County</b>
2020 Request	\$574,700 ( <i>status quo</i> budget)

Contact Name:	Megan Poindexter
Address:	745 Vermont Street
City, State Zip	Lawrence, KS 66044
Phone No.	785-842-0543
E-mail:	mpoindexter@YourSRC.org

#### Community Partner Overview:

Since 1972, the Senior Resource Center for Douglas County (SRC) has held the responsibility and privilege to be the senior “center” for Douglas County. For many years, this role as a “center” was demonstrated by the activities which occurred within the building at 745 Vermont Street. Since January of 2017, the role as a “center” became a unique challenge while SRC was relocated for a full building renovation. SRC experienced new challenges in being an organization without a proper facility while still in service for the seniors of Douglas County. These challenges were met with creative solutions thanks to the support of the Douglas County community, and through this time SRC has persevered and succeeded in maintaining this critical role in the community.

As SRC approaches the anticipated return to 745 Vermont in the late-summer of 2019 (well over two years later), SRC is poised to radically leap into a new phase of service for seniors of Douglas County, and we couldn’t be more excited.

What has not changed is SRC as the **source for information, support, navigation and referrals for older adults and their families** as they move through the second half of life. This is especially seen through a warm, hands-on approach through SRC’s Health and Human Services team. The personalized care each caller or visitor receives from this team of professionals allows them to fully explore their current situation, their goals and hopes, and consider a multitude of options for their future. At times, this team is able to provide direct services, such as: the **1,000+ individuals who are counseled and enrolled in Medicare Part D** each year through SRC’s SHICK program (Senior Health Insurance Counseling for Kansas), coordinating Safe Winter Walkways where seniors are matched with a volunteer to meet the city’s timeline to shovel snow from sidewalks, free legal assistance from Kansas Legal Services, or the Caregiver Support Group led by SRC’s caring professionals. At other times, this team can be a warm hand-off to a referral for in-home support services, therapeutic services, tours for assisted living facilities or any other of a myriad of needs.

Additionally, SRC has provided the critical service of **affordable, accessible transportation** throughout Douglas County through Senior Wheels. In 2018, **8,413 rides** were provided to individuals who were unable to drive themselves, and the **great majority of these rides were for health related needs**, such as preventative care doctor appointments, follow up doctor appointments, physical therapy, pharmacy visits and more. Included with these health-related rides are trips to the grocery

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store or pantries like Just Food. But this portion of rides only address the traditional definition of “health”. As our society learns more about the **Social Determinants of Health, we recognize that rides to things like social engagement activities, recreation activities, visits with loved ones, and more are equally impactful on a person’s individual health, including their mental health.** Because SRC has **two vehicles which can accommodate wheelchairs**, many riders who are logistically unable to secure transportation through other means such as Uber or a taxi service have an option in addition to the services shared by SRC’s community partner, Independence Inc. (focusing services on out-of-county medical rides and county rides outside of Lawrence) or the City of Lawrence’s T-Lift (serving only inside Lawrence). When all three options are working together, more people with significant mobility issues are able to get where they need to go, and in a manner that is affordable and safe.

### **But what about this move back to 745 Vermont Street in 2019? How will this change the services provided by SRC?**

The fall of 2019 at SRC is shaping up to be a historic shift in how seniors in Douglas County will experience both the needed services offered by SRC, but also, the desired senior engagement which only SRC can create.

Over the first three months of 2019, **SRC has conducted a multitude of focus groups and surveys throughout the Douglas County community.** Including an on-line survey, a paper-survey and face-to-face conversations, it has become crystal clear that our community deeply misses the activities for seniors which used to occur at 745 Vermont Street. Feedback has been collected with the help of community partners at LMH Health, Visiting Nurses Association, Vermont Towers, Lecompton Community Pride, Eudora Senior Potluck, Baldwin City Senior Engagement Coordinating Council (SECC), Babcock Towers, Douglas County Coalition on Aging, SRC’s Caregiver Support Group members, Lawrence Area Professionals for Aging, and even an article in the Journal World.

**Based on the feedback of well-over 200 people (and we aren’t done yet!), one thing is clear: The Douglas County senior population needs opportunities to alleviate isolation through programs which allow them to engage with other people in ways that are educational, social, recreational, creative, emotional, dynamic and enriching.** The gap left in our community while SRC has been relocated has been felt deeply by those who counted on SRC’s facility to host and conduct experiences. Seniors are a demographic who have a high incidence of intense changes in their life circumstances, such as the loss of the natural community of the work place, the loss of friends and loved ones who are aging, or the newness of moving to a new community to be near grandchildren. **Offering these extensive opportunities in an affordable way—on a sliding scale or free of charge—to all members of Douglas County’s senior community is the number one thing the SRC is anxious to get back to once back home at 745 Vermont Street.**

Yet Douglas County is a unique place with multiple communities who all enjoy their own identity and personality. Although much of what the SRC will do is focused on activities which take place at the facility, there is so much more we can do for those who aren’t interested in driving (or enjoying a ride on Senior Wheels) to 745 Vermont Street in Lawrence. **Growing and**

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**strengthening partnerships with the communities of Eudora, Lecompton and Baldwin City is critical to successfully serving all of Douglas County.** Then, to also engage with people throughout the county who are in the smaller communities and townships is the next goal of increasing that county-wide outreach. Currently, that outreach is seen through the monthly **Eudora Senior Potluck**, coordinated by SRC to include an informative and enriching speaker/ presentation. SRC is currently assisting the **Baldwin City SECC** with reinvigorating their monthly meetings with additional coordination of presenters, as the prior coordinator was struggling to keep up this task on his own. In addition, SRC's **Baldwin Senior Wheels** is a unique model of empowering a community's existing neighbor-to-neighbor care by providing the vehicle and covering the related expenses so their corps of volunteer drivers can focus on the important task of transportation for Baldwin City's senior residents. Also, SRC is working toward a **stronger relationship with the community of Lecompton** by regularly meeting with the leadership of Lecompton Community Pride and other community leaders to assess solutions to challenges unique to Lecompton, including the loss of their grocery store at the end of 2018.

These are just the first steps to the beginning of the possibilities to grow SRC's support of seniors in an intentional, community-driven way throughout *all* of Douglas County.

**Extensive conversations and planning has commenced between SRC and a wide variety of community partners with the plans to help SRC return to full breadth and depth of services upon the return to 745 Vermont Street.** Specific activities have already been identified and preliminary plans have been made with other providers of services for seniors, including but not limited to: LMH Health, Lawrence Public Library, Lawrence Parks and Recreation, Visiting Nurses Association, Tenants to Homeowners, Just Food, Kansas Adult Protective Services, Osher Adult Learning, Watkin's Museum, Lawrence Arts Center, Downtown Lawrence Inc, and more.

As is clear, 2019 may be the biggest year for the Senior Resource Center for Douglas County since its founding in 1972. The population of seniors in Douglas County is expected to grow exponentially in the coming years based on the national census of the Baby Boomer generation's 10,000 people per day who are turning 65-years-old. Other population tracking indicators tell us that Douglas County's quantity of that growth is expected to **meet and exceed 20,000 people** within the next few years. As life expectancies get longer, the next twenty years are sure to grow the demands on SRC even beyond what we may now be able to anticipate. **To meet this emerging demand, SRC has big dreams, big ideas, big goals and the support of the Douglas County community—including the funding from the Douglas County government—to help us bring it all to fruition.**

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### Service Overview - Metrics and/or data that describe the service impact:

The Senior Resource Center for Douglas County carefully records the visits and phone calls of those who seek assistance from our Health and Human Services department. In 2018, our H&HS team **fielded 2,008 contacts from unduplicated individuals (some of whom benefited from multiple conversations and/ or meetings)** with **5,268 unique units of information distributed** on issues related to health, housing, services, and more.

Individuals who receive Medicare enrollment counseling and assistance are tracked, including those who complete their Medicare Part D enrollment with the aid of SRC's professional staff or highly-trained volunteer Medicare counselors. During Open Enrollment alone (Oct. 15- Dec. 7, 2018), SRC's Medicare team counseled **801** unduplicated individuals. Outside of Open Enrollment, SRC's Medicare team counseled an **additional 306** unduplicated individuals throughout the calendar year for a **total of 1,107**. Again, many of these individuals benefit from multiple contacts throughout the year. The majority of these visits result in Part D enrollment. Yet about one-third of these visits may be objective conversations about the confusing and overwhelming issues related to health insurance of all types, changes in health status which might affect health insurance or preparing for enrollment later.

Through the software used for coordinating Senior Wheels, SRC is able to produce detailed data on the rides provided, including the destination and frequency for individual riders. In 2018, **8,413** rides were given by the driving staff at SRC. An additional **227** rides were provided by the Baldwin City Senior Wheels volunteers for a **2018 total of 8,640**.

**4,078 of these rides were related to the traditional definition of health**, such as to-and-from LMH Health, dialysis, physical therapy, doctor's offices, pharmacists, cardiology, oncology/radiology, dentists, behavioral therapy, and more.

Individuals who visit the SRC office for a face-to-face meeting to discuss any issue related to aging complete a customer information form. At this time, we do track age and address, but we do not track other demographics such as race or socio-economic status. However, there is conversation occurring as to how SRC can start to appropriately and gracefully track additional demographic information.

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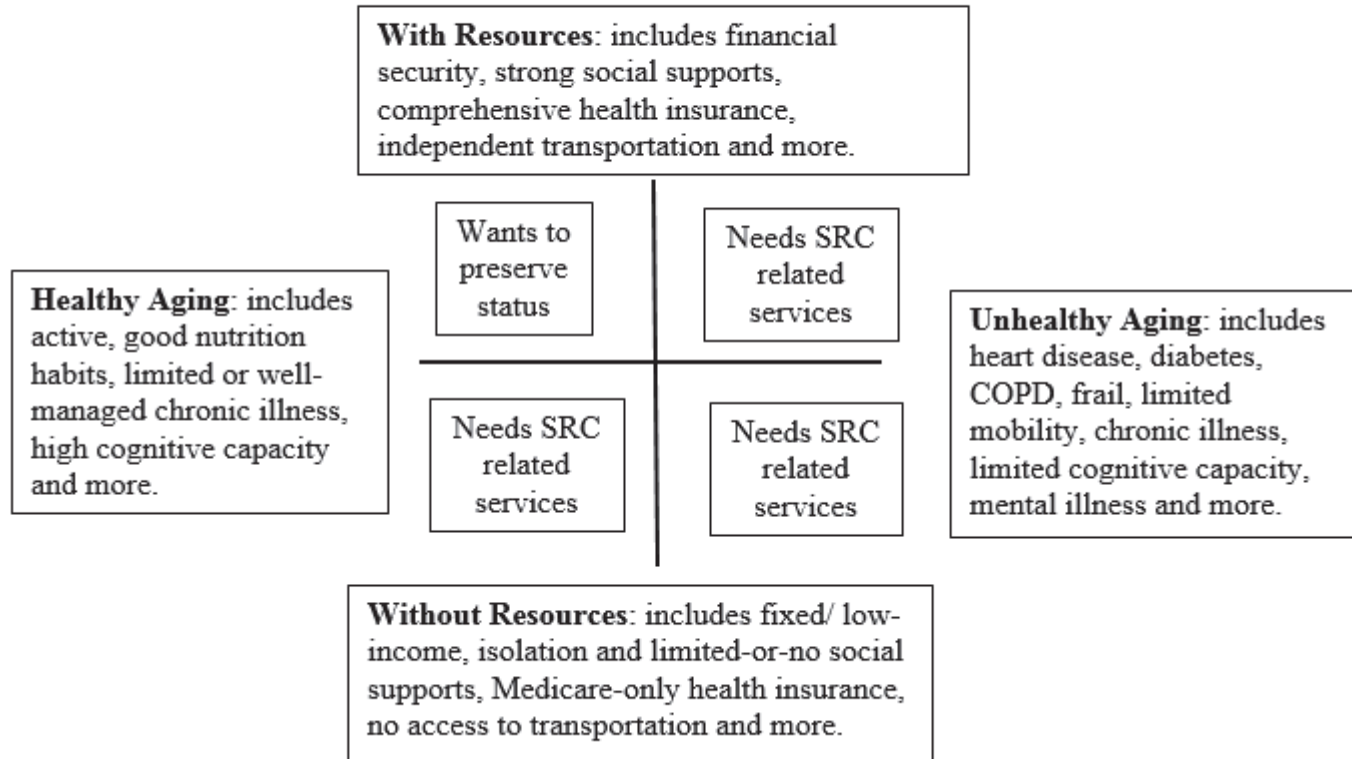
### Alignment to County Focus Areas and Collaboration:

Community Partner:	<b>Senior Resource Center for Douglas County</b>
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<b>Focus Area:</b>	Human Services, Public Safety and Emergency Services
<p>The Senior Resource Center for Douglas County addresses two of Douglas County’s identified focus areas: Human Services and Public Safety and Emergency Services.</p> <p><b>Human Services:</b> Human Services is the most directly related Douglas County goal to SRC’s mission. Everything SRC does every day is to improve the quality of life for the seniors of Douglas County and their families. As can be seen by the <b>Human Service Matrix below</b>, SRC serves to positively impact seniors in all four quadrants of the matrix. Each individual senior of Douglas County falls somewhere within this matrix, and typically we can identify where ourselves, our loved-ones and our neighbors fall.</p> <p>It is easy to see why a person in the three “Needs SRC” quadrants need SRC’s services. But what is often shocking to individuals is how quickly someone can move from one sector of the matrix to another sector. For instance, a person can be well-within the Healthy Aging and Resourced quadrant, and experience a sudden health crisis such as a stroke, heart attack or even a fall with a broken bone. Suddenly, they find themselves in one of the other three quadrants. Other times, a person can expect a short-term change in status, such as a routine joint replacement surgery, but unexpected complications occur from which they may never recover.</p> <p>A situation which can surprise individuals is when a couple are both living in the Healthy-Aging and Resourced quadrant, but one of them has a health crisis. Both of their established life patterns and plans suddenly drastically change. As the person with the health crisis is addressing their urgent needs, the other person instantly becomes the primary caregiver. This can mean transportation every day to-and-from doctor’s appointments, one-on-one personal care, financial considerations, loss of work and more.</p> <p>In all of these instances, SRC can step in for assistance with transportation, navigation of support services, and when SRC has moved back to 745 Vermont Street, a place where individuals can more easily engage with others to reduce isolation, find support, learn more about resources in the community, and generally enjoy an enhanced life experience.</p>	

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### Senior Resource Center for Douglas County Human Service Matrix



#### Public Safety and Emergency Services:

SRC is stationed to provide and enforce considerations for public safety and emergency services. This is observed at an advocacy level, on a minutia level with individual seniors, or as a source of connection for those who are mid-crisis.

**Example of advocacy:** Currently, SRC is working to connect Adult Protective Services (APS) with the Douglas County court system to seek new options and pathways for APS to have a crisis-level capacity evaluation completed for a vulnerable adult who has been referred to APS. Because SRC is a source to identify and support efforts for all seniors, **SRC took on the challenge with APS leadership to work with Judges McCabria and Kittel to better understand current capacity**

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**evaluation statutes, brainstorm with other area service providers for options and work towards smoother, quicker pathways for these evaluations.** Evaluations such as these are necessary when, for instance, a vulnerable senior is in the Emergency Department and unable to communicate on their own, in which case a guardian must be assigned in order to help all responsible parties identify a safety plan for this person. These instances are quite rare, so when they do occur, it is often a bumpy, erratic process for all involved. APS currently has a source for these evaluations, but often they are unable to assess the vulnerable senior for up to two weeks. That delay means the demand of addressing the crisis is not met. SRC's involvement is to advocate with all parties to bring to the table the wide variety of stakeholders and ensure this effort stays on track.

**Example regarding individual seniors:** Education can be at the base for many of SRC's interactions with individuals in a preventative manner to prevent emergency incidents. A **simple example is education to avoid falls within the home through steps as simple as removing throw-rugs and installing stair traction tape.** Broader examples are the **prevention and intervention techniques learned in the Health Education Speaker Series currently being planned where SRC will partner with LMH Health and Visiting Nurses Association** to educate individuals on symptoms, signs of, prevention of and management of illnesses such as stroke, diabetes, heart disease, and more. In addition, although typically SRC's transportation through Senior Wheels is designed for riders to schedule their rides three-days in advance, this is waived in unique circumstances. For instance, **on occasion, LMH Health contacts SRC to provide time-sensitive transportation for a patient who is discharging from the hospital.** Frequently, these individuals come to the hospital via ambulance, but have no transportation home. SRC makes every possible effort to accommodate these requests.

**Example of emergency source of connection:** When a senior finds themselves in a crisis, or a family has a crisis with their loved one, SRC is often the first place they call. Our team of caring individuals in our Health and Human Service Department are always willing to drop everything to field a call in these circumstances. **SRC staff will help a person in crisis talk through their situation, identify first (second, third) steps, and can even call ahead to the next place(s) they need to contact to create a seamless referral transfer.**

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	2016 Actuals	2017 Actuals	2018 Actuals	2019 Adopted Budget	2019 Current Estimates	2020 Budget Request
<b>Revenues:</b>						
Unrestricted Fund Balance 1/1/xx	862,604	870,021	809,785	822,606	822,606	742,312
<b>Douglas County</b>	<b>568,500</b>	<b>599,700</b>	<b>599,700</b>	<b>574,700</b>	<b>574,700</b>	<b>574,700</b>
City of Lawrence	47,500	7,500	7,500	7,500	7,500	7,500
United Way	0	0	0	20,000	20,000	0
Grants	9,407	9,028	2,482	5,000	8,000	10,000
Fundraisers	1,743	0	17,873	19,250	19,250	10,000
Contributions	29,677	42,949	46,912	43,000	60,000	75,000
Other: Fed, State grants	302,329	141,598	131,869	54,250	56,000	56,000
Other: Program revenue	86,639	91,051	105,747	65,300	65,300	90,000
Interest	593	1,044	(1,151)	1,000	1,000	1,000
<b>Total Revenues:</b>	<b>1,046,388</b>	<b>892,870</b>	<b>910,932</b>	<b>790,000</b>	<b>811,750</b>	<b>824,200</b>
<b>Total Revenues and Fund Balance</b>	<b>1,908,992</b>	<b>1,762,891</b>	<b>1,720,717</b>	<b>1,612,606</b>	<b>1,634,356</b>	<b>1,566,512</b>
<b>Expenditures:</b>						
Salaries	436,054	441,824	454,059	464,088	464,088	464,088
Employee Benefits	40,891	42,023	39,760	49,567	49,567	50,000
Health Insurance	66,661	74,103	61,818	61,240	67,240	70,000
Supplies	3,341	1,806	3,825	999	999	2,000
Utilities, Building Maintenance	19,921	15,833	8,127	28,280	28,280	20,000
Travel & Training	1,358	3,746	6,291	1,750	1,750	2,000
Office Equipment/ Renovation Costs	1,551	1,962	90	92,565	120,000	3,000
Debt Payments	0	0	0	0	0	0
Other: Program expenses	280,241	247,961	220,889	47,350	47,350	60,000
Other: Operating expenses	188,610	123,534	97,482	107,770	107,770	150,000
Other: Fundraising	343	314	5,770	5,000	5,000	5,000
<b>Total Expenditures:</b>	<b>1,038,971</b>	<b>953,106</b>	<b>898,111</b>	<b>858,609</b>	<b>892,044</b>	<b>826,088</b>
<b>Ending Fund Balance 12/31/xx</b>	<b>870,021</b>	<b>809,785</b>	<b>822,606</b>	<b>753,997</b>	<b>742,312</b>	<b>740,424</b>

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### Budget Request Analysis

Community Partner: **Senior Resource Center for Douglas County**

#### Analysis of Revenue Sources:

The Douglas County government funding remains the most critical portion of funding for SRC. This funding ensures that core components to services can continue so SRC can leverage funding from other sources which would not alone allow for program feasibility.

For instance, the funding from Douglas County ensures the salaries for the Health and Human Services staff who can pivot to qualify for two small grants through the State of Kansas, the SHICK grant and the MIPAA (Medicare Improvements for Patients and Providers Act) grant. **These two grants qualify SRC to provide the sizable amount of Medicare counseling each year, yet alone would not be enough to cover the entirety of the cost of this program.**

Additionally, Douglas County's investment means Senior Wheels can support the salaries for the transportation director and dispatcher and covers with much of the overhead for vehicle maintenance, registration and more. This in turn allows SRC to secure a small amount of **annual funding from KDOT in addition to KDOT's vehicle matching purchase program.** Because Senior Wheels' **riders also pay a low fare toward each ride** they receive, the riders themselves put into the bottom line of the Senior Wheels program. In addition, **Midland PACE has an agreement with SRC for their clients** to receive transportation, for which PACE pays per ride. Coming in 2019, SRC **hopes to secure a contract with the State of Kansas' Medicaid transportation program**, thus allowing SRC to provide rides to Medicaid recipients which would be reimbursed by KanCare's Managed Care Organizations.

Douglas County's support for the administrative overhead of SRC is met with a **small amount of funding from the City of Lawrence**, specifically earmarked for the salary of the Executive Director, as well as a **small amount provided by the Baldwin City government** for operations. A conversation is in progress to establish a similar arrangement with the city government of Eudora and their new foundation designed to meet the needs of seniors.

Thanks to the community in Douglas County, SRC has a sound **donor database and grows it each year.** Because the vast majority of services provided by SRC are free of charge, SRC asks that all **users of services consider a donation** to SRC. This occurs at "check out"; when a customer form is completed at the end of a face-to-face appointment with an SRC staff person or volunteer. For example, when someone has an appointment for Medicare counseling, they are educated that the service itself is free. However, in order to assure that SRC can continue to provide this service, their donation helps to safeguard operations at SRC. The majority of individuals who enjoy this free service do see the value of maintaining SRC,

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and therefore make a donation at a level they can afford when they leave. These donations add to the overall revenue for SRC, but would not be possible if the County's funds were not supporting the bottom line of the program(s).

While SRC does enjoy a loyal base of donors built from this system, SRC also has an opportunity to **build this base significantly in the coming year**. The anticipated excitement and infusion of activities which will surround SRC's return to 745 Vermont will include a chance to **appeal to donors in a new, invigorating way**. At this time, SRC has already changed the conversation about **corporate sponsorships throughout the community**. Plans to ask SRC's community partners (both for- and non-profit) to invest through financial support allows SRC to leverage the excitement of our Homecoming (the name of our celebration to return downtown), and carrying that forward with a new plan to use marketing and partnership activities. These activities can appeal to a sponsor's charitable giving budget, but also their marketing budget and encourages those community partners to invest in SRC in turn. **SRC has already secured one major corporate sponsor** (currently confidential) for the 2019-20 sponsorship season, and hopes to repeat that success with other sponsors.

### Analysis of beginning & ending fund balances, and dedicated or restricted cash reserves:

SRC enjoys healthy **reserves in both a Money Market account and with funds housed at the Douglas County Community Foundation**. The goal is for SRC to hold in reserves one-year's operating expenses, which currently SRC has approximately four-months.

However, the major consideration at this time are **the unique expenses related to SRC's move back to 745 Vermont this fall**. Returning to that facility **will require use of some reserves and specific funds** for purchasing **furniture** for rooms which didn't exist under the old floor plan, as well as some features on the 745 Vermont site which will be a unique expense. For instance, if a current passer-by looks at the "front door" at 745 Vermont, they will see a POLICE sign. This sign has been deemed historic, therefore, SRC cannot remove it. SRC will need to invest in a **historically approved, appropriate sign cover** to eliminate to the best of our ability any confusion that SRC is not, in fact, a police station. This is an unexpected expense that we do not yet know the total of, and we can be relatively assured it will not be inexpensive. In addition, SRC is investing in a **hearing loop** for the two multi-purpose rooms at 745 Vermont Street in order to accommodate those with hearing loss. We know that many other **smaller expenses will add up**.

Otherwise, it is the policy of the SRC Board of Directors that reserves should not be used for operations unless it is a unique situation or there is an emergency. Because almost everything about the move back to 745 Vermont is a unique situation, we know we will be forced to dip into reserves to complete the move. The intent is not to use any more than necessary.

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<b>Analysis of expenditure changes:</b>
<p>It is expected that, once the high expenses associated with the 2019 move back to 745 Vermont Street have leveled out, SRC will return to a financial status that is stable and protects (and even grows) reserves. There will be <b>costs associated with growing and re-building the many additional programs</b> SRC intends to offer the community as quickly as possible. SRC has already begun collecting offers of those who would volunteer to lead groups, thus reducing the need for additional paid staff, at least initially. However, when these activities begin again in earnest and the SRC facility returns as the mainstay of the senior community, the time dedicated to regular fundraising should yield results. Then SRC will be able to consider investments in both activities which have associated programmatic costs, but also create the possibility for revenue through participation fees. But ultimately, it is SRC's critical responsibility in 2019 and 2020 to leverage this exciting opportunity.</p>