

Georgetown Thrives: Care for the Aging & Caregiving population

2021 GHF Annual Grant Program

AGE of Central Texas

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Application Form

General Instructions

If approved, should they receive the short or long application?

Long

Congratulations on your advancement to the full application stage!

Please complete the remaining sections of the application. The first four sections labelled "LOI" are included for your reference and are "read only."

Program Name & Amount Requested

Program Name*

Georgetown Thrives: Care for the Aging & Caregiving population

Amount requested

\$30,000.00

LOI - About Your Organization

Organization Mission

AGE of Central Texas helps older adults and their caregivers thrive as they navigate the realities and opportunities of aging and caregiving.

Organization Vision

A society where aging is a shared journey marked by connection, strength, and vitality, and the role of caregiving is supported through community, collaboration, and guidance

Date of Incorporation

1986

Describe your organization's scope of work

AGE of Central Texas helps older adults and their caregivers thrive as they navigate the realities and opportunities of aging and caregiving. In 1986, our founders Burt Kruger Smith and Willie Kocurek gathered passionate nonprofit organizations who serve older adults and their caregivers, forming the Austin Groups for the Elderly, or AGE. Over the years, the organization developed seven comprehensive programs to empower older adults and caregivers with the support and resources they need to thrive. In 2012, AGE changed its name to AGE of Central Texas to reflect our reach; AGE serves the Central Texas community with seven key programs: • Thrive Social & Wellness Centers (formerly Adult Day Health Centers): daytime care for adults with physical needs or mental loss • CaregiverU: free classes and information on topics important to caregivers such as caregiving best practices and fall prevention • Health Equipment Lending Program (HELP): free, no durable medical equipment and incontinence products • Memory Connections: free weekly meeting with activities and support group for adults in the early stages of a memory impairment disease • AGE Computer Lab: technology class for older adults, by older adults • Caregiver Resource Center: one stop shop for caregiver resources, support, and consultation, including seminars and conferences, influence, and work in the greater Central Texas area • Virtual Connections- Virtual care co-designed between AGES professional staff, the older adult, and the caregiver to meet their specific needs and challenges. This program was launched in 2020.

How many unique individuals did your organization serve during the prior fiscal year?

1585

What geographic area does your organization serve?

AGE is dedicated to serving any and all older adults and caregivers in need of our services in the Central Texas Region and plan to continue to grow to meet the increasing needs of one of the fastest-growing older adult population in the country. We most predominantly serve people from Williamson, Travis, Hays, and Bastrop county.

Please select the Georgetown zip codes your organization currently serves:

78626 78628 78633 78634 78673 78674

LOI - Financial Overview

UPLOAD: Most Recent Audit.

Please upload your organization's most recent audit and include all formal communication received from the audit firm in relation to the financial statement audit.

NOTE: If your organization has not commissioned an audit AND if you are applying for less than \$25,000, GHF will accept a CPA-prepared financial statement review. As with the audit, upload all formal communication received from the firm in relation to the review.

****GHF will not accept Forms 990, 990-EZ, or 990-PF in place of an audit or CPA-prepared financial statement review.****

All documents must be uploaded as one PDF.

LOI - Funding Request

PRIORITY 1: Basic Needs (Physiological)

Please identify the focus area(s) your proposal seeks to address (select all that apply):

PRIORITY 2: Basic Needs (Safety) & Social Determinants of Health

Please identify the focus area(s) your proposal seeks to address (select all that apply):

Personal Security Mental Healthcare Healthcare Support for Homebound Adults

Priority 3: Supporting Social Determinants of Health for Priorities 1 & 2

Please identify the focus area(s) your proposal seeks to address. Select all that apply:

Proposal Narrative

Describe how GHF grant funds will be used, if awarded. Please be sure to explain how your organization and this funding request aligns with GHF's Mission, Vision/Vision Philosophy, and Target Population. Specifically identify the target population with which you will be working.

AGE of Central Texas humbly requests Georgetown Health Foundation's support to offer adult day health care, support and guidance, education, and resources for older adults and family caregivers in Georgetown and the greater Georgetown region. A critical need that AGE's services will address is social isolation among the aging community. AGE approaches combating social isolation not only as a mental health issue but as a physiological health issue as well. The National Institute on Aging reports that social isolation increases the risk of chronic illnesses, depression and loneliness, medical decline and even death. While this issue is always present among older adults and caregivers, COVID-19 has amplified the issue and increased AGE's programs' need. Additionally, AGE is focused on meeting the basic needs of the aging community by providing meal solutions, durable medical equipment and hygiene items, and caregiving education to ensure that older adults are safe and healthy while at home. COVID-19 continues to result in a higher risk of falls for homebound older adults lacking the proper safety equipment and to negatively impact finances in ways that lead to food insecurity. If awarded AGE will use funding to support six major programs currently serving Georgetown residents. Georgetown Health Foundation's award will go toward staff salaries, program activity expenses, program supplies and equipment, food and food delivery, and technology services. Each category plays a critical role in providing the care that older adults and caregivers in Georgetown need. • AGE's expert staff is licensed to provide compassionate and dignified care for older adults with cognitive illnesses such as Alzheimer's or dementia. Many staff members have social work backgrounds or licenses to equip them to better serve both the caregiver and the older adult. Funds will be used to keep our staff paid, though each staff member continues to experience a pay cut due to COVID-19. • AGE's Thrive Social & Wellness Center and Memory Connections programs offer evidence informed activities designed to provide cognitive and physical stimulation as well as needed socialization. Activities include Bingo, arts and crafts, low impact exercise, and more. Funds will be used to purchase any necessary supplies or contract to help of local vendors to execute each activity. • Each AGE program utilizes personal protection equipment as recommended by the CDC and local health officials as well as provides all that is needed to administer care. Funds will be used to purchase any necessary equipment. • Every AGE program is and will be offered virtually to care for older adults and

caregivers isolated to their homes as they continue to quarantine due to COVID-19. Funds will be used to cover technology-related expenses such as equipment maintenance, Wi-Fi, and the purchase of any necessary technology applications or tools. Across all programs, we project to serve 621 residents of Georgetown or the greater Georgetown area. More specifically, AGE projects that funding from Georgetown Health Foundation would provide 538 caregivers with the education and support needed to navigate their caregiving responsibilities, durable medical equipment and hygiene items for 50 older adults, AND 9 older adults with adult day health care, virtual care, or early memory loss support. These services will not only serve Georgetown residents, but also the most diverse cohort in our country, spanning every socioeconomic background, race, ethnic group, age, gender, and sexuality. A recent study conducted by AGE and commissioned by the St. David's Foundation found that 1 in 3 Central Texans are or will be caregivers. According to 2020 report from AARP, 61% of caregivers are women, 8% of caregivers self-identify as members of the LGBTQ+ community, and 39% of all caregivers self-identify as people of color. Supporting AGE is an investment in our community as a whole because the challenges of aging span all generations, racial and ethnic groups, income and education levels, family types, gender identities, and sexual orientations. Caregiving is a challenge that does not discriminate. AGE's services in Georgetown in 2021 will be critical. While social isolation has become a well know topic because of its heightened presence in the COVID-19 world, it is a challenge that has always faced the aging community and their caregivers. Ultimately, the Georgetown Health Foundation's support would ensure that Georgetown residents won't have to caregive alone and that all will have the opportunity to THRIVE while they age.

UPLOAD: Proposal Budget & Expense Narrative

Please upload your proposed budget and include the following details:

Staff. Position title(s), salary(ies), and fringe working directly with this program. Include rationale for each position and percentage of time these positions will spend on the program.

Supplies. List descriptions and costs for each supply, including rationale as to why these supplies are essential to the success of the program.

Overhead. Provide your organization's overhead rate and the rationale for that rate. If you include a line item for an administrative position(s), please provide salary percentage and rationale.

LOI - Relationship with Georgetown and GHF

Collaboration

In what ways do you collaborate or coordinate your services with other local organizations to serve Georgetown-area residents?

AGE values and depends on community collaboration to provide needed services. For example, AGE partners with: • Williamson County EMS to reduce fall-related injury by delivering free durable medical equipment and instruction on how to use said equipment to low income older adults in need. • The Worship Place, located in Georgetown, to provide CaregiverU education. • The East Williamson County Collaborative comprised of the Capital Area Rural Transportation System, Baylor Scott & White, Opportunities for Burnet and Williamson Counties, Meals on Wheels, Blue Bonnet Trails, The Caring Place, Boys and Girls Club, and the Georgetown Area Parkinson's society to effect change, combine resources, and connect individuals to services. • Christ Lutheran Church to provide physical space needed for AGE's Memory Connections program to facilitate services. This will be utilized if local health factors allow for a return to in-person care.

Describe your organization's work in Georgetown

fallAGE's Health Equipment Lending program has partnered with the Williamson County EMS to provide free, durable medical equipment and hygiene items to low income older adults in need. As EMS workers receive "fall calls" or conduct wellness visits where a need for medical equipment is identified, AGE provides the equipment, and EMS hand delivers it to rural areas and demonstrates the correct use of the equipment. Since partnering, Wilco EMS reports a 75% decrease in repeat calls as a direct result of the equipment serving as a preventative measure. The Round Rock Thrive Social & Wellness Center provides affordable, licensed adult day health care with daily agendas designed to provide meaningful social connections in a medically-supervised environment. While their loved one attends, caregivers receive respite and support. Program participants are typically 65-years-of-age or older and have cognitive or physical challenges such as Alzheimer's or dementia. The Center accepts Medicaid, Veteran's Assistance, private pay and need-based financial aid. Additionally, the Thrive Centers will serve those unable to return to in-person care with virtual services to reduce isolation and improve health. Memory Connections provides those with early-onset memory loss with the tools and peer support needed to live with their condition, along with the education needed to prepare themselves and their family for what to expect as the disease progresses. The families of program participants are equally supported with support groups, education, and resources. CaregiverU provides free courses for non-professional or "family" caregivers that teach fundamental caregiving skills such as fall prevention, understanding dementia, and caring for oneself while caring for someone else. Some classes are being offered virtually and others are being offered with social distances and other health protocols in mind. AGE's Information & Resource Center will facilitate 2 conferences and multiple weekend seminars to provide in-depth education for caregivers and older adults on topics such as falls prevention, end of life care, financial planning, and more. Virtual Connections provides older adults with 100% virtual care that directly addresses their unique needs and challenges. Virtual Connections broadens AGE's reach to connect with people who are unable to get to our locations due to distance or health concerns or lack of transportation but need professional support and assessment.

How many unique Georgetown residents did your organization serve during the prior fiscal year?

Out of the total number of unique individuals your organization served during the prior fiscal year, how many were Georgetown residents?

222

Is your organization's main office located in Georgetown?

No

If no,

where is your organization's main office located? Do you maintain a satellite space in Georgetown? If so, what is the address of the Georgetown-based satellite space?

Has your organization ever received a GHF grant?

Yes

Do you currently receive any form of rent assistance from GHF?

No

If yes, please provide:

- Property address;
- Annual rent payments to GHF;
- Annual grant dollars committed by GHF to your organization specifically associated with your lease agreement.

Organizational Strategy & Capacity

Instructions. The following four questions were adopted from Charting Impact, developed by the Better Business Bureau Wise Giving Alliance, GuideStar USA, and Independent Sector. We include these questions because they give us a holistic understanding of your organization's approach to achieving your mission. ***Remember to answer these questions at the organizational level, not the program level.***

NOTE: If needed, upload additional information (methodology, rationale, citations for key statistics and research) in a separate document when prompted in the "Citations, Acknowledgement, & Assurance" section.

What is your organization striving to accomplish?*

Clearly and concisely state your organization's ultimate goal for intended impact. Examine how your goals for the next three to five years (or an alternate time frame specified in your answer) fit within your overall plan to contribute to lasting, meaningful change. When finished ask yourself, "If someone unfamiliar with our work were to read this, would they have a clear definition of what long-term success means for my organization?"

mainAGE works diligently to address the significant issues facing older adults and caregivers in Georgetown and Central Texas. Recently Covid-19 shed light on the dangers of social isolation, but older adults have long been among the most at-risk populations to experience social isolation. The National Institute on Aging reports that social isolation increases the risk of chronic illnesses, depression and loneliness, medical decline, and even death, leading AGE to approach combating social isolation as a mental health and physiological health issue. Social isolation doesn't just have adverse effects on older adults but also family caregivers. According to a 2020 study from AARP, 50% of caregivers who report feeling alone believe caregiving has a negative health effect, compared to just 13% who do not feel alone. Nearly 4 in 10 caregivers, or 36%, say they are experiencing high emotional stress, and that number skyrockets to 72% when the caregiver feels alone. AGE recognizes the critical and growing need for its services in Georgetown and in Central Texas. According to Attitudes on Aging, a 2019 survey commissioned by the St. David's Foundation: 7 in 10 Central Texas residents are not aware that the Austin-Round Rock metro area is the second-fastest-growing population of adults 65 and older, and the fastest-growing population of adults 55-64 in the U.S. Among Central Texans who are or will be caregivers, almost half are worried about their stress levels and/or depression. AARP found in 2020 that across the board, the need for services for older adults and caregivers is increasing and that navigating those services is increasingly difficult. AARP also found that those caring for someone aged 65 or older also more often report their care recipient has Alzheimer's or dementia. When asked to identify their care partner's "main problem," among the top three listed were mobility Issues and Alzheimer's or Dementia. Finally, AGE is here to close the cost gap by offering the most affordable services in the area. Caregiving and aging can cause significant financial strain on the caregivers, older adults, and their families. Caregiving in the U.S., a report from AARP, found in 2020 that almost half of caregivers (45%) have experienced at least one financial impact resulting from their caregiving. Savings for things like retirement or education also can be impacted; 28% of caregivers have stopped saving, and more concerning 22% have used

up short term savings, and 12% have used up long term. We know from attitudes on aging a survey commissioned by the St. David's Foundation that when asked about what concerns they have about aging, 48% of Central Texans responded that they worry about running out of money, and 30% of caregivers feel uncertain about their finances in caring for an older adult. AGE's services in Georgetown aim to address these growing issues, and AGE seeks to grow our services to meet the community's needs. AGE offers the community affordable specialized care across the board through our six key programs serving Georgetown:

- Thrive Social & Wellness Centers (formerly Adult Day Health Centers): daytime care for adults with physical needs or mental loss.
- CaregiverU: free classes and information on topics important to caregivers such as caregiving best practices and fall prevention
- Health Equipment Lending Program (HELP): free, durable medical equipment and incontinence products
- Memory Connections: free weekly meeting with activities and support group for adults in the early stages of a memory impairment disease
- Caregiver Resource Center: one stop shop for caregiver resources, support, and consultation, including seminars and conferences, influence, and work in the greater Central Texas area
- Virtual Connections- Virtual care co-designed between AGE's professional staff, the older adult, and the caregiver to meet their specific needs and challenges. AGE launched this program in 2020 to permanently implement virtual care into AGE's repertoire of services knowing that there will always be a population of older adults and caregivers unable to access in-person care due to availability, geographic location, lack of transportation, or other factors.

What are your strategies and capabilities for making this happen?*

Describe your organization's strategies and capacities that support your long-term progress toward accomplishing the goals you cited in the previous question. Specify why your organization believes the methods you employ will benefit your target population and/or advance your issue. Detail your organization's core assets, including internal and external resources.

Through utilizing our programs, older adults experiencing cognitive and physical challenges can receive access to engaging daily programming that fosters social connectivity, safe exercise, and cognitive stimulation, all while receiving personal care and nutrition in a medically supervised environment. These services fulfill basic needs for older adults so that they may age with dignity, maintain levels of independence, and hold onto the quality of life everyone deserves. Without these services, older adults and caregivers are left vulnerable to the potentially fatal impact of social isolation, rapid cognitive decline, falls and corresponding physical disabilities, and more. AGE's purpose is to provide vital services to prevent that from happening. AGE uses nationally recognized evidence-based curriculum and research-based courses delivered by our professional staff, including social workers, certified activity directors, nurses, and non-profit professionals. AGE's expert staff are able to provide compassionate and dignified care for older adults with cognitive illnesses such as Alzheimer's or dementia. Not only do our staff specialize in older adult care, but many staff members have social work backgrounds or licenses to equip them to better serve both the caregiver and the older adult. For caregivers, AGE offers resources to support aging loved ones by providing courses on best caregiving practices, opportunities for respite to reduce caregiver burnout, and support groups. AGE strives to support caregivers and be a partner in care on their caregiving journey. AGE has achieved significant programmatic and collaborative accomplishments over our 35 years in operation. Initially, AGE was created to serve as a launching pad for other non-profits by providing administrative support and affordable office space. AGE is proud to say many outstanding organizations, including the Alzheimer's Association, Creative Action, and Family Eldercare, have used AGE to enhance and expand their missions. That spirit of collaboration continues to this day with many active partnerships to fulfill our mission and extend our reach, including many partners in Georgetown. These include places like The Worship Place, Christ Lutheran Church, Williamson County EMS, and more.

How will your organization know if you are making progress?*

Explain how your organization assesses progress toward your intended impact. Identify milestones that signal progress and success. Describe your assessment and improvement process: the methods you use as you measure key indicators and how your organization uses that information to refine your efforts.

AttitudesAGE evaluates success and determines the future of programs through data and feedback received from annual surveys. AGE also goes through a series of rigorous internal and external evaluations to monitor each program's effectiveness, adapting as feedback and observations are made. The Thrive Social & Wellness Centers are evaluated every three years for licensing by the State of Texas. AGE strives to go above and beyond the State of Texas's minimum standards and has never failed to pass an inspection. Ultimately, AGE works to help older adults age in place longer. All of AGE's services are designed to help older adults and their caregivers have the resources, knowledge, and support to be able to age in their own home. Along the way, AGE sets goals based on success indicators that can determine the effectiveness of AGE program. For example, we strive to have at least 80% of clients strongly agree or agree that AGE programming gave them tools and resource knowledge to cope with the stress of caregiving, at least 80% strongly agree or agree that they feel less stressed because their family member attends the Thrive Social and Wellness Center, and 80% of participants attending Virtual Connections and/or Memory Connections feel more socially connected. Senior staff analyzes the surveys and uses the results to inform programmatic changes. AGE remains a progressive organization, working toward understanding the community's needs and evaluating our processes and services to make necessary adjustments. Conversely, uniformly positive feedback indicates AGE's impact and signals the necessity of AGE programs. According to a recent survey commissioned by the St. David's Foundation entitled "Attitudes on Aging", Central Texans consider AGE's innovative programming to be critical. AGE proudly serves between 3000-4000 older adults and caregivers annually.

What have and haven't you accomplished so far?*

Demonstrate recent progress toward your long-term goals by describing how your near-term objectives are propelling your organization toward your ultimate intended impact. Go beyond the outputs of your work to make clear how these outcomes are contributing to fulfilling long-term goals. In describing both outcomes achieved and those not yet realized, include what your organization has learned about what does and doesn't work, what risks and obstacles exist, and what adjustments to goals, strategies, or objectives have been made along the way.

Non-ProfitIt would be impossible to explain everything AGE has achieved in its almost 35 years of service to older adults in Central Texas. Still, a significant achievement would be filling the gap in providing a financial alternative for those who can't afford in-home care. AGE is the only licensed adult day center in Central Texas and is the most affordable means of care available. AGE accepts Medicaid, VA Benefits, and private pay on a sliding scale rate to cover the cost of care through the Thrive Centers. Additionally, AGE has become a thought leader within the community and plays an active role in creating social and community change to benefit older adults and caregivers. For example, AGE co-hosts the local HIV and Aging Conference to educate and empower older adults living with HIV with the support and education they need. Under AGE's leadership, this conference has grown to be well known in our region and depended upon by many. Over AGE's history, we have been honored to be recognized for our innovation and excellence. Some recent examples include: The Austin Home Health Care Council voted AGE as "Non-Profit of the Year" for 2018 and 2019; we have also been nominated for 2020. The Senior Resource Guide voted the AGE Thrive Centers to be the "Best Adult Day Health Program" for 2019. Finally, one of our Program Directors, K.C. Lawrence, was voted "Social Worker of the Year" by Greater Austin Social Workers. All of that said, AGE is always striving to do more, AGE is working to make services more accessible to communities of color. AGE actively partners with churches in Georgetown and is working to build relationships with faith communities to better reach communities of color. Here's what we know, 75% of Black or African Americans say that religion is very important in their life, according to a recent Pew Research poll. We also know that sharing health concerns outside of a family unit can be taboo, making it harder to reach out for services. By building relationships with communities of faith, AGE will open the door to building trust around our services. We have seen this recently with the CDC recognizing communities of faith and faith leaders as crucial pieces of the puzzle to build confidence in the COVID-19 vaccine. AGE is also working to make progress in reaching the Spanish-speaking

communities. Through a partnership with Superior Health and Univision, AGE has translated all of our program flyers to be available in both English and Spanish. AGE will continue to work on translating program-related materials through this partnership, so that Spanish-speaking communities may have access to up-to-date information on AGE's services. Aging is an issue that faces the most diverse cohort in our country, spanning every socioeconomic background, race, ethnic group, age, gender, and sexuality. Ultimately, AGE wants to make our services as inviting as possible to all communities in Georgetown and Central Texas.

Organization Staff*

How many staff does your organization have? What is the percentage of staff turnover during the last 12 months? What are the primary contributors to staff turnover?

AGE Has a staff of 32 individuals dedicated to improving the lives of older adults and caregivers. The staff turnover was 10% in the last 12 months with the major contributors being COVID and long-term medical issues.

Organization Volunteers*

Does your organization engage volunteers to deliver its programs and services? If so, please describe how they help you to achieve your organizational and programmatic goals.

In light of COVID-19, AGE focused our efforts on safely engaging volunteers to alleviate social isolation for the older adults and family caregivers AGE serves. AGE volunteers create accessible digital content, lead virtual activities, write engaging letters, and create/instruct tech education classes. • Digital Content: Volunteers directly engage with AGE participants by leading activities including yoga, meditation, art, and more via Zoom or pre-recorded video. • Letter Writing: Volunteers provide engagement/positivity by sending hand-written letters to homebound older adults. • Tech Education: Volunteers lead live classes or produce recorded instructional videos to teach a variety of topics such as how to use food delivery apps, how to use Zoom, how to access tele-medical support, and more. When public health conditions allow, AGE looks forward to continuing with the opportunities that have arisen from COVID-19 and reopening all volunteer opportunities that were put on hold. Those opportunities include: • Organizing, cleaning and repairing durable medical equipment and hygiene items to be distributed for free to low income older adults. • Assisting with weekly memory loss activities for older adults with an early stage dementia diagnosis. • Maintaining outdoor garden spaces to provide older adults with a safe space to gather and participate in therapeutic outdoor activities. Volunteers play a critical role in achieving AGE's vision to make aging and caregiving a shared journey marked by compassion, strength, and community.

Organization Board of Directors*

How many Board of Directors does your organization have? What is the percentage of board turnover during the last 12 months? What are the primary responsibilities of your Board of Directors?

The AGE board of director's most significant responsibility is to steer AGE of Central Texas's strategic vision and foster meaningful community connections. AGE has a 15-person board comprised of community leaders and professionals passionate about aging and caregiving. In the past 12 months, AGE has had one person drop from the board of directors or a 6.66% turnover.

UPLOAD: Board List*

List each board member's name, place of business, home address, and years with the organization. ***Specify the percentage of board members that make a financial contribution to your organization.***

BOARD LIST 040921.pdf

Georgetown Community Responsiveness

What makes your Georgetown efforts unique to the community?*

Briefly describe what sets your work apart from other nonprofits in the area and why your organization is best situated to provide this service(s).

What sets AGE apart from others doing similar work is first our expert staff. AGE couldn't be more proud of our exceptional team of dedicated professionals. AGE is able to provide the most passionate care possible due to the dedication of our team of nurses, social workers, program directors, and non-profit professionals, many of whom have their own aging and caregiving journey that have drawn them to the work. AGE also stands out of the crowd due to our dedication to older adults and family caregivers together. CaregiverU offers the bulk of its courses to caregivers, but it also provides fall prevention classes tailored to older adults. AGE believes investing in caregivers and older adults will create a healthier aging community and impact entire family units. AGE offers a linear progression of services for older adults, starting with early memory loss support in Memory Connections and Virtual Connections, to adult day health care through the Thrive Centers. A progression of care allows older adults and their caregivers to move through our services and build relationships with our programs and staff throughout their aging journey. AGE also benefits from our extensive network of partners that have been developed over the past 30+ years. AGE utilizes this ever growing network to provide services to as many older adults and caregivers as possible. In order to keep up with the rapid growth in Georgetown and Central Texas AGE will continue to expand our services to meet the needs of the community and help older adults and caregivers thrive!

How does your organization interpret needs and adapt its programs accordingly?*

Describe how your organization monitors evolving community needs and adapts its work to meet them. Provide a recent example.

AGE is dedicated to meeting the needs of the aging population and those who care for them no matter the circumstance and are poised to thoughtfully react to any need presented while also continuing our regular services that our constituents depend on. When AGE closed its doors in April of 2020 due to COVID-19, we immediately transitioned each program to providing virtual and socially distant care designed to prevent/alleviate social isolation for older adults and caregivers AGE serves. Virtual care has continued along with our re-opening process through a newly launched program called Virtual Connections which provides individual virtual care specially designed to meet each participant's unique needs. In partnership with the Aging Services Council, AGE is working to bridge the divide in technology literacy for older adults creating specialized programming to help break down the barriers that new technology imposes. The program will provide older adults with tablets and a 10-hour self-guided curriculum that builds self-confidence when using new technology and eventually opens the door to greater connection through these devices. AGE focuses on meeting the aging community's basic needs by providing meal solutions, durable medical equipment, hygiene items, and caregiver education to ensure that older adults are safe and healthy while at home. Additionally, AGE remains nimble to the evolving needs that result from local issues, such as the recent Texas winter storm. AGE worked with H-E-B to provide drinking water for older adults and worked with the RBJ Center to provide needed incontinence supplies for older adults. AGE continues to be deft in our reactions to emerging

issues, such as mental and physiological health problems, and meeting the community's basic needs. AGE of Central Texas is committed to being a partner in care to older adults and family caregivers.

Research commissioned by GHF in 2019 and 2015 revealed participants' experience with unequal treatment due to race, citizenship, education, and socioeconomic status. They also expressed a desire to have more voice in decisions that impact them.

The following two questions are designed to help GHF understand how you make your resources visible and accessible to all eligible participants.

Publicizing and Recruiting*

How do you ensure that Georgetown community members who need these resources the most are aware of them? If funded, how, when, and where will you publicize/recruit to engage them?

AGE has a multilateral year-round strategy to reach our constituents, including print media, direct mail, social media, geographically targeted ads, television, and radio. AGE also uses our connections with community partners like with the East Williamson County Collaborative, local churches such as Christ Lutheran and The Worship place, and more to ensure Georgetown community members are aware of the services AGE has to offer. AGE believes sending representatives into the community, whether through partners or at information sessions and community outreach, allows us to build trust in communities and spread the word about AGE's services..

Considering the program locale, how are transportation and accessibility addressed?*

Access to our services remains at the forefront of AGE's priorities. Over the years, AGE has made considerable strides to make our programs accessible. AGE has a fleet of buses to offer door-to-door transportation to and from the Thrive Centers. AGE regularly partners with cap metro and Drive a Senior to improve accessibility and offer no-cost or low-cost transportation to our programs and events. To further the reach of our services, AGE launched its newest program, Virtual Connections, which will provide a broad range of services co-designed by AGE staff and participants that can be accessed from anywhere with an internet connection.

Proposed Program Details

Description of Proposed Program*

Describe the program for which you are requesting funding and the issue it seeks to address. Explain how you determined the Georgetown community's need for this program. Detail the strategies, resources, capacities, and connections that support your progress toward the program's identified goals. Provide evidence to support the strategies you employ within the program that reinforce your organization's long-term goals, and cite whether such strategies have been proven effective by research (if needed, attach citations, research, and any additional information in the "Citations, Acknowledgement, & Assurance" section).

The Georgetown Thrives project and all AGE programs seek to combat the dangerous effects of isolation among older adults and caregivers. Research indicates that loneliness is the most treatable symptom of aging and that if older adults can find relief for their loneliness, they can hold on to everyday abilities and thus

remain independent, slowing the decline rate. In Central Texas, there is a range of high-end care options for older adults who can pay, but there is a lack of affordable care. The Thrive Centers are the most affordable care option available to older adults in our community. AGE accepts Medicare, VA, and private pay to cover to cost of care. The private pay rate is based on a sliding scale, and financial aid is made available so that low-income older adults have access to this needed program. We estimate that our adult day health center services alone save Central Texas families a combined total of approximately \$3.6 million per year, alleviating the financial burden of caregiving for hundreds of families while allowing disabled older adults to age in place longer. AGE's Thrive Centers primarily serve individuals in the later stages of dementia or other cognitive illnesses, while AGE's Memory Connections program comes in right after an early memory loss diagnosis has been made. Memory Connections aims to provide older adults facing a memory loss diagnosis with evidence-informed care intended to slow the progress of dementia, educate them and their caregivers on what to expect as the disease advances, and emotional support as they come to terms with their illness. As Central Texas ages, families are taking the lead role in providing care for aging adults. Statistics suggest that two-thirds of older adults rely exclusively on family members and other informal helpers for care, and a recent Attitudes on Aging survey commissioned by the St. David's Foundation found that one in three Central Texans are or will be a caregiver in their lifetime. Non-professionally trained family caregivers are often juggling the responsibility of caring for their older loved ones on top of caring for children and spouses. The care that older adults, especially those with cognitive or physical disabilities, require can often be overwhelming. This takes a toll on caregiver's finances and their mental and physical health. The Family Caregiver Alliance reports that family members are at risk for emotional, mental, and physical health problems that arise from complex caregiving situations and the strains of caring for frail or disabled relatives. They also report that between 40-70% of caregivers have clinically significant symptoms of depression, with approximately one-quarter to half of caregivers meeting the diagnostic criteria for major depression. Caregivers hold families together and enable loved ones to get the most out of life, but they can't do it alone. AGE's Information & Resource Center provides caregivers with one-on-one support from licensed staff to discuss their unique challenges and identify the community resources, including AGE programs that can best address their needs. CaregiverU provides education for caregivers to learn how best to care for their loved one while also caring for themselves. The curriculum covers fall prevention and stress management, and directly impacts a caregiver's ability to successfully manage their caregiving duties. Through AGE, caregivers have access to support groups to interact with peers experiencing similar challenges and meet their emotional needs. The Georgetown Thrives project will also help address a critical growing need for disabled older adults in the Georgetown community access to durable medical equipment to prevent falls. According to the Center for Disease Control, falls are the leading cause of fatal and nonfatal injuries among adults 65 and older. Data from the CDC also shows that one in three adults 65 and older experiences a fall each year and that people who fall once are two to three times more likely to fall again. One of the best ways to prevent falls is to use appropriate medical equipment such as walkers, shower chairs, and wheelchairs. Unfortunately, the equipment cost can be daunting, with equipment ranging from \$25-250 for those without the insurance to cover it. There is no income or means test to qualify for the Health Equipment Lending Program (HELP), meaning anyone who needs equipment can get it. Clients are referred to HELP through area hospitals, word of mouth, and other social service agencies that AGE works with directly. AGE has a positive approach to care and is committed to serving all older adults and caregivers in need by providing welcoming spaces that lift the spirits of all who enter. The ability to age with dignity, love, and independence and the opportunity to caregive while uplifted by a community of support is what funds awarded to this project will ultimately create.

Proposed Impact*

How does this program prevent/eliminate/reduce the issue OR educate/rehabilitate/maintain a person affected by the issue?

Across all programs, we project to serve 621 residents of Georgetown or the greater Georgetown area. More specifically, AGE projects that funding from Georgetown Health Foundation would provide 538 caregivers with the education and support needed to navigate their caregiving responsibilities, would fund durable medical equipment and hygiene items for 50 older adults, AND provide 9 older adults with adult day health care, virtual care, or early memory loss support. Funding will help AGE to continue re-establishing in-

person programming in Georgetown, while also continuing AGE's strides in virtual programming through the permanent establishment of the Virtual Connections program. AGE aims for our presence in Georgetown and Williamson County to continue to grow over the coming years and decades. AGE has served Central Texas for 35 years with expert care and will continue to do so as long as older adults and caregivers need support. Ultimately, the Georgetown Health Foundation's support would ensure that Georgetown residents won't have to caregive alone and that all will have the opportunity to THRIVE while they age.

Goals

Grant Period: The grant period for all GHF Annual Grants is **July 1 - June 30**.

Number of Georgetown residents to be served by this grant*

621

INSTRUCTIONS: Input at least 1 and up to 3 goals that will be achieved through the funding of this proposal. The goal(s) should be attainable within the 12-month grant period.

GOAL 1*

What end result would this grant support?

AGE has identified stress as a major issue with a wide range of consequences facing family caregivers of older adults. AGE will look to see a reduction of self-reported stress levels in family caregivers of older adults.

Support for the Goal 1: Outcomes, Outputs, Tracking, Activities, Inputs*

Provide a logic model(s) through which you will achieve your goal(s). Organize the logic model for each goal as outlined below. Additional prompts are provided to guide your responses within each category.

Outcomes: *What result will show the accomplishment of the strategy? What impact do you anticipate will result from completion of the activities?*

Outputs: *What are the quantitative measures (# of participants, # of sessions held, # of encounters, etc.) that demonstrate progress?*

Tracking: *How will you measure your progress? What systems will you employ to assess the activities?*

Activities: *What activities will support the goal?*

Inputs: *What resources (human, financial, organization, etc.) will be committed to this goal?*

Outcomes: 80% will strongly agree or agree that AGE programming gave them tools and resource knowledge to cope with the stress of caregiving. 80% will strongly agree or agree that they feel less stressed because their family member attends the Thrive Social and Wellness Center. **Outputs:** Client Numbers: number of unduplicated clients served, attendance at conferences and seminars. Service Numbers: Number of classes taught, hours of programming or care provided, number of encounters with clients. **Tracking:** AGE will Track results via two annual surveys and post-conference, seminar, or class surveys administered after each educational event or course. **Activities:** CaregiverU: Evidence-based and/or research-informed classes for family caregivers and older adults taught through a collaborative model of partner agencies; Free. Resource and Information Center: individual consultations with older adults and family caregivers; educational

seminars and conferences for caregiver; support groups for former and current caregivers; Free. Virtual Connections: Personalized schedule of small group activities designed in partnership with AGE staff, and the family caregiver and older adult; Fee-based. Health Equipment Lending Program (HELP): loans of durable medical equipment and disbursements of incontinent products to those in need; Free. Thrive Centers: daytime care (including engaging activities, nurse monitoring, nutritious meals, and transportation options for older adults needing physical or cognitive support); fee-based. Memory Connections: Strengths based small group activities for people living with dementia; Fee-based. Inputs: Human Resources: AGE Staff, Contractors/Vendors, Student Interns, Volunteers. Financial Resources: Earned income from fee-based programs (private pay, service contracts with VA, Medicaid, State of Texas, CACFP). Contributed Income: Grants, Donations, Sponsorships Physical Resources: AGE Building, Leased Space, Buses, Program Host sites, Technology: Client database, communication equipment, Supplies/Materials: Activity supplies, research data, durable medical equipment, tools for minor DME repairs, nursing supplies, food/meal supplies.

GOAL 2 (if applicable)

AGE has identified social isolation as a critical issue, especially for older adults. AGE seeks for 80% of participants in Memory Connections or Virtual Connection to feel more socially connected.

Support for the Goal 2: Outcomes, Outputs, Tracking, Activities, Inputs

Provide a logic model(s) through which you will achieve your goal(s). Organize the logic model for each goal as outlined below.

Outcomes:

Outputs:

Tracking:

Activities:

Inputs:

Outcomes: 80% of participants attending Memory Connections or Virtual Connections will feel more socially connected. 80% of all caregivers of a Thrive Center member will strongly agree or agree that their family member benefits from the daily exercises and activities. Outputs: Client Numbers: number of unduplicated clients served Service Numbers: Number of classes taught, hours of programming or care provided, number of encounters with clients. Tracking: AGE will Track results via two annual surveys and post-conference, seminar, or class surveys administered after each educational event or course. Activities: CaregiverU: Evidence-based and/or research-informed classes for family caregivers and older adults taught through a collaborative model of partner agencies; Free. Resource and Information Center: individual consultations with older adults and family caregivers; educational seminars and conferences for caregiver; support groups for former and current caregivers; Free. Virtual Connections: Personalized schedule of small group activities designed in partnership with AGE staff and the family caregiver and older adult; Fee-based. Health Equipment Lending Program (HELP): loans of durable medical equipment and disbursements of incontinent products to those in need; Free. Thrive Centers: daytime care (including engaging activities, nurse monitoring, nutritious meals, and transportation options for older adults needing physical or cognitive support); fee-based. Memory Connections: Strengths based small group activities for people living with dementia; Fee-based. . Inputs: Human Resources: AGE Staff, Contractors/Vendors, Student Interns, Volunteers. Financial Resources: Earned income from fee-based programs (private pay, service contracts with VA, Medicaid, State of Texas, CACFP). Contributed Income: Grants, Donations, Sponsorships Physical Resources: AGE Building, Leased Space, Buses, Program Host sites, Technology: Client database, communication equipment, Supplies/Materials: Activity supplies, research data, durable medical equipment, tools for minor DME repairs, nursing supplies, food/meal supplies.

GOAL 3 (if applicable)

Support for the Goal 3: Outcomes, Outputs, Tracking, Activities, Inputs

Provide a logic model(s) through which you will achieve your goal(s). Organize the logic model for each goal as outlined below.

Outcomes:

Outputs:

Tracking:

Activities:

Inputs:

Your Goals and Organization's Strategic Plan*

Does your organization adhere to a strategic plan? If so, how do specific components of your strategic plan tie to the goals outlined in this section?

AGE's strategic plan is driven by the organization's vision, where AGE is a nationally recognized expert on empowering older adults and caregivers to tackle the challenges of aging. AGE is also the nonprofit thought leader that has spearheaded a movement to change the way society thinks and talks about aging by establishing replicable collaborations between government/city agencies, 501c3 nonprofits, and the for profit community. AGE's diverse, robust, and qualified staff are successfully supported by a workplace culture rooted in teamwork, flexibility, and respect. AGE's focus on Georgetown is no chance or mistake, but a continued investment in a community that needs our services. While the issues exasperated by COVID-19 will make 2021 one of the most critical years for our services yet, AGE plans to continue building new partnerships and supporting older adults and family caregivers in Georgetown far into the future.

Organizational Financials

Fiscal Year Start Date*

Please enter the start date of your current fiscal year

01/01/2021

Fiscal Year End Date*

Please enter the end date of your current fiscal year.

12/31/2021

What are your organization's cash reserves, i.e., days cash on hand?*

\$300,000.00

How many months could the organization operate at your continued budget level?*

2

UPLOAD: Balance Sheet for Prior Fiscal Year*

(PDF format)

Balance Sheet - 2020.pdf

UPLOAD: Income Statement for Prior Fiscal Year*

(PDF format)

5. 2020PL.pdf

UPLOAD: Actual vs. Budget Income Statement for the Prior Fiscal Year*

(PDF format)

2020 Budget to Actuals.pdf

UPLOAD: Current Year-to-Date Financials to include Balance Sheet and Income Statement.*

(PDF format)

2021 YTD Financials Feb 2021.pdf

UPLOAD: Year-to-Date Cash Flow Statement

If your organization generates a Cash Flow statement, upload it here in PDF format. If not, leave blank.

2021 YTD Financials Feb 2021.pdf

UPLOAD: Organization Budget for Proposed Fiscal Year, Related to the Grant Period*

(PDF format)

1. Org Budget.pdf

Most Recent Organization Audit

If your organization completed an audit since your LOI submission, please upload the most recent audit here.

Sources of Organizational Support: Individual Donor Contributions*

Provide the total revenue from individual contributions and the total number of individual donors from the prior fiscal year (please do not disclose donor names).

573 donors \$196,650

Sources of Organizational Support: Top 5 Sources*

Provide your organization's top 5 sources of revenue from the prior fiscal year (PFY) and the amount (e.g., Texas Health & Human Services contract, \$250,000).

Foundation Grants Moody Foundation \$40,000 St. David's Foundation \$590,000 Foundation Emergency Funding: The Moody Foundation \$87,500 St. David's Foundation \$150,000 Contracts Veterans Affairs \$32,890

Citations, Acknowledgement & Assurance

Additional Information and Research Citations (optional)

Upload any critical details about your organization or program(s) not already included within this application that will strengthen your case for funding (no marketing material, please). This attachment may also be used to cite any statistics/research, and to define key terms and/or acronyms.

Acknowledging GHF*

Type your name and date in the space below to assure that if funded, the organization will acknowledge GHF on all related marketing materials, your website, social media, and in any other communications in which this program is promoted.

Charles Morris 4/9/21

Assurance*

Type your name and date in the space provided to assure that by submitting this application, you 1) confirm that the information herein is true and correct, 2) confirm that if funded, funds will be spent according to the budget listed in this application, and 3) confirm that the organization will submit interim and final reports as required.

Charles Morris 4/9/21

File Attachment Summary

Applicant File Uploads

- BOARD LIST 040921.pdf
- Balance Sheet - 2020.pdf
- 5. 2020PL.pdf
- 2020 Budget to Actuals.pdf
- 2021 YTD Financials Feb 2021.pdf
- 2021 YTD Financials Feb 2021.pdf
- 1. Org Budget.pdf



AGE of Central Texas's Board is a 100% giving board.

Catherine Vergara 3 years
AGE- Board President
President
CareFor
Austin, TX 78738

John Miller 2 years
AGE-Board Treasurer
Senior Vice President of Commercial Lending
Southside Bank
The Hills, TX 78738

Jared A, Greathouse 4 years
AGE- Board Member
Partner & Attorney at Law
Amini & Conant LLP
Round Rock, TX 78681

Mary Beth Chalk 2 years
AGE- Board Member
President
Chalk & Associates, LLC
Austin, TX 78703

Margaret DeVinney 1 year
AGE- Board Member
Director of Education
Halcyon Home
Austin, TX 78735

Jason McBride 1 year
AGE- Board Member
Senior Vice-President, Medicare Operations
Superior Health Plan
Austin, TX 78759

Liz Nielsen 1 year
AGE- Board Member
Founder
Nielsen Law PLLC
Austin, TX 78759

Julia Menegay 2 years
AGE- Board Vice Chair
Chief Operating Officer
Texas Nurses Association
Austin, TX 78757

Brianna McKinney 2 years
AGE-Board Secretary
President
Bloom Communications
Austin, TX 78759

Patti Tauber 4 years
AGE-Board Member and Past President
REALTOR, GRI, SRES
Carrol Dochen Realtors
Austin, TX 78731

Craig Couch 1 year
AGE- Board Member
Co-founder and Partner
Centric Commercial
Austin, TX 78737

Ismael Martinez 1 year
AGE- Board Member
News Director
KAKW Channel 62 Univision
Austin, TX 78758

Lina Supnet-Zapata 2 years
AGE- Board Member
Executive Director and Managing Partner
MIR Care Consultants
Austin, TX 78754

Ronnie Taylor 1 year
AGE- Board Member
Owner
Homewell Senior Care
Cedar Park, TX 78613

12:58 PM

03/19/20

Accrual Basis

Austin Groups for the Elderly
Balance Sheet
As of January 31, 2020

	Jan 31, 20
ASSETS	
Current Assets	
Checking/Savings	
Donated Gift Cards	2,351.30
Operating Checking/Savings	317,103.92
Restricted Cash for Campaign	159,924.20
Total Checking/Savings	479,379.42
Accounts Receivable	
Accounts Receivable	131,296.56
Campaign Receivables	349,354.00
Total Accounts Receivable	480,650.56
Other Current Assets	
EHWC Security Deposit	3,285.00
Prepaid Expenses	5,165.00
Prepaid Insurance	15,245.64
Prepaid Rent for WC	4,585.00
Total Other Current Assets	28,280.64
Total Current Assets	988,310.62
Fixed Assets	
Accumulated Depreciation	-1,481,902.62
AGE Furniture & Equipment	82,358.14
Automobiles	388,852.64
Building & Improvements	1,246,776.31
CRC Furniture & Equipment	2,000.00
EHWC Equipment	32,686.02
Elderhaven Furn & Equip	33,958.83
Land	181,695.00
Leasehold Improvements - EHWC	87,095.86
Senior Net Furn & Equip	19,807.87
Total Fixed Assets	593,328.05
Other Assets	
Capital in Process	64,287.40
Total Other Assets	64,287.40
TOTAL ASSETS	1,645,926.07
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	16,798.96
Total Accounts Payable	16,798.96
Credit Cards	
Chase Business	11,683.30
Total Credit Cards	11,683.30
Other Current Liabilities	
Accrued Payroll	59,259.86
Payroll & Accrued Liab	22,154.20
Prepaid Rent	2,272.20
Security Deposits	6,056.16
St. David's Aging Services	1,200.10
Total Other Current Liabilities	90,942.52

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03/19/20

Accrual Basis

Austin Groups for the Elderly
Balance Sheet
As of January 31, 2020

	Jan 31, 20
Total Current Liabilities	119,424.78
Total Liabilities	119,424.78
Equity	
Net Assets	20,000.00
Retained Earnings	833,066.95
Temp. Restricted Net Assets	735,341.77
Net Income	-61,907.43
Total Equity	1,526,501.29
TOTAL LIABILITIES & EQUITY	1,645,926.07

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03/19/20

Accrual Basis

Austin Groups for the Elderly

Profit & Loss

January 2020

	Jan 20
Ordinary Income/Expense	
Income	
Allocated Rents	14,250.00
External Rents and Fees	11,769.18
General Contributions	4,090.44
Grant Revenues	54,684.57
Memory Connections	3,810.00
Miscellaneous Income	61.03
Privately Funded Service Fees	39,623.40
Publicly Funded Service Fees	40,616.99
Sponsorships/Event Revenues	14,362.60
Total Income	183,268.21
Gross Profit	183,268.21
Expense	
Activity Expenses	1,242.05
Board & Employee Development	106.66
Copier Lease & Printing	3,632.23
Dues, Fees, Permits	2,022.89
Employee Benefits	8,474.08
Food & Food Supplies(ADHC only)	11,356.55
Fund Raising Expenses	3,243.38
Insurance	3,481.68
Office Expenses	765.96
Outreach	674.00
Payroll Expenses	122,822.85
Professional Fees	6,794.00
Program Supplies & Equipment	1,738.94
Rent	18,835.00
Repairs & Maintenance	4,478.02
Technology Services	4,654.75
Utilities	1,293.35
Vehicle Operation	6,034.44
Total Expense	201,650.83
Net Ordinary Income	-18,382.62
Other Income/Expense	
Other Expense	
Capital Assets	169.17
Comprehensive Campaign Expenses	43,355.64
Total Other Expense	43,524.81
Net Other Income	-43,524.81
Net Income	-61,907.43

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02/17/21

Accrual Basis

Austin Groups for the Elderly
Profit & Loss
January through December 2020

	<u>Jan - Dec 20</u>
Ordinary Income/Expense	
Income	
Allocated Rents	171,000.00
Corporate	41,015.20
External Rents and Fees	135,124.96
General Contributions	196,670.85
Grant Revenues	1,151,034.62
Memory Connections	26,557.50
Miscellaneous Income	6,390.37
PPP Grant	307,947.50
Privately Funded Service Fees	120,170.25
Publicly Funded Service Fees	104,271.72
Sponsorships/Event Revenues	33,309.32
Total Income	<u>2,293,492.29</u>
Gross Profit	2,293,492.29
Expense	
Activity Expenses	5,531.22
Board & Employee Development	5,621.23
Copier Lease & Printing	35,673.62
Dues, Fees, Permits	6,120.34
Employee Benefits	110,353.16
Food & Food Supplies(ADHC only)	40,882.99
Fund Raising Expenses	14,304.07
Insurance	41,780.16
Office Expenses	7,412.46
Outreach	14,602.39
Payroll Expenses	1,319,963.52
Professional Fees	38,923.04
Program Supplies & Equipment	12,733.49
Rent	226,020.00

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02/17/21

Accrual Basis

Austin Groups for the Elderly
Profit & Loss
January through December 2020

	<u>Jan - Dec 20</u>
Repairs & Maintenance	53,876.80
Technology Services	67,178.64
Utilities	49,702.35
Vehicle Operation	<u>42,641.21</u>
Total Expense	<u>2,093,320.69</u>
Net Ordinary Income	200,171.60
Other Income/Expense	
Other Income	
Capital Grants & Funding	16,614.99
Comprehensive Campaign Revenue	166,175.10
Season of Caring Contributions	<u>9,664.56</u>
Total Other Income	192,454.65
Other Expense	
Capital Assets	16,614.99
Comprehensive Campaign Expenses	450,543.24
Season of Caring Expenses	<u>9,664.56</u>
Total Other Expense	<u>476,822.79</u>
Net Other Income	<u>-284,368.14</u>
Net Income	<u><u>-84,196.54</u></u>

Austin Groups for the Elderly

Profit & Loss Budget vs. Actual

January through December 2020

	Jan - Dec 20	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Income				
Allocated Rents	171,000.00	171,000.00		100.0%
Corporate	48,220.20	26,000.00	22,220.20	185.5%
Emergency Funding - COVID 19	400,065.40			
External Rents and Fees	135,244.96	145,000.00	-9,755.04	93.3%
General Contributions	236,967.07	238,000.00	-1,032.93	99.6%
Grant Revenues	1,054,223.23	926,700.00	127,523.23	113.8%
Memory Connections	26,557.50	46,000.00	-19,442.50	57.7%
Miscellaneous Income	6,390.37	8,300.00	-1,909.63	77.0%
PPP Grant	307,947.50			
Privately Funded Service Fees	120,170.25	510,500.00	-390,329.75	23.5%
Publicly Funded Service Fees	104,239.90	408,500.00	-304,260.10	25.5%
Sponsorships/Event Revenues	33,309.32	65,000.00	-31,690.68	51.2%
Total Income	2,644,335.70	2,545,000.00	99,335.70	103.9%
Gross Profit	2,644,335.70	2,545,000.00	99,335.70	103.9%
Expense				
Activity Expenses	8,341.87	29,000.00	-20,658.13	28.8%
Board & Employee Development	9,264.92	13,000.00	-3,735.08	71.3%
Contributed Volunteer Hours	40,192.38			
Copier Lease & Printing	36,703.01	35,000.00	1,703.01	104.9%
Depreciation Expense	101,978.52			
Dues, Fees, Permits	6,120.34	4,750.00	1,370.34	128.8%
Employee Benefits	113,312.98	119,000.00	-5,687.02	95.2%
Food & Food Supplies(ADHC only)	40,734.65	137,000.00	-96,265.35	29.7%
Fund Raising Expenses	14,362.24	33,000.00	-18,637.76	43.5%
Insurance	36,545.32	42,000.00	-5,454.68	87.0%
Office Expenses	7,510.43	12,000.00	-4,489.57	62.6%
Outreach	19,208.40	34,500.00	-15,291.60	55.7%
Payroll Expenses	1,304,255.08	1,470,000.00	-165,744.92	88.7%
Professional Fees	38,923.04	80,000.00	-41,076.96	48.7%
Program Supplies & Equipment	15,076.43	47,000.00	-31,923.57	32.1%
Rent	230,610.00	227,750.00	2,860.00	101.3%
Repairs & Maintenance	53,680.85	62,000.00	-8,319.15	86.6%
Technology Services	67,233.77	62,000.00	5,233.77	108.4%
Utilities	53,046.50	62,000.00	-8,953.50	85.6%
Vehicle Operation	52,898.31	75,000.00	-22,101.69	70.5%
Total Expense	2,249,999.04	2,545,000.00	-295,000.96	88.4%
Net Ordinary Income	394,336.66		394,336.66	100.0%
Other Income/Expense				
Other Income				
Capital Grants & Funding				

Cash / Accrual Basis

Austin Groups for the Elderly
Profit & Loss Budget vs. Actual
January through December 2020

	Jan - Dec 20	Budget	\$ Over Budget	% of Budget
Comprehensive Campaign Revenue	186,175.10			
Season of Caring Contributions				
Total Other Income	186,175.10			
Other Expense				
Capital Assets				
Comprehensive Campaign Expenses	449,148.66			
Season of Caring Expenses				
Total Other Expense	449,148.66			
Net Other Income	-262,973.56			
Net Income	131,363.10		131,363.10	100.0%

3:30 PM

04/09/21

Accrual Basis

Austin Groups for the Elderly

Balance Sheet

As of February 28, 2021

	Feb 28, 21
ASSETS	
Current Assets	
Checking/Savings	
Donated Gift Cards	2,326.62
Operating Checking/Savings	427,512.70
Restricted Cash	461,670.56
Total Checking/Savings	891,509.88
Accounts Receivable	
Accounts Receivable	30,173.86
Campaign Receivables	261,234.80
Total Accounts Receivable	291,408.66
Other Current Assets	
Deposits	40,372.40
Prepaid Expenses	4,091.99
Prepaid Insurance	27,304.83
Prepaid Rent for WC	13,755.00
Total Other Current Assets	85,524.22
Total Current Assets	1,268,442.76
Fixed Assets	
Accumulated Depreciation	-1,725,081.84
AGE Furniture & Equipment	82,358.14
Automobiles	388,852.64
Building & Improvements	1,246,776.31
CRC Furniture & Equipment	2,000.00
EHWC Equipment	32,686.02
Elderhaven Furn & Equip	33,958.83
Equipment & Furniture	21,999.13
Land	181,695.00
Leasehold Improvements - EHWC	87,095.86
Senior Net Furn & Equip	19,807.87
Total Fixed Assets	372,147.96
Other Assets	
Capital in Process	1,928,155.84
Total Other Assets	1,928,155.84
TOTAL ASSETS	3,568,746.56
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	6,268.50
Total Accounts Payable	6,268.50
Credit Cards	
Chase Business	8,387.98
Total Credit Cards	8,387.98
Other Current Liabilities	
Accrued Payroll	49,038.10
Payroll & Accrued Liab	41,058.87
PPP Loan	307,900.00
Prepaid Rent	1,200.00
Security Deposits	5,283.66

3:30 PM

04/09/21

Accrual Basis

Austin Groups for the Elderly

Balance Sheet

As of February 28, 2021

	Feb 28, 21
Total Other Current Liabilities	404,480.63
Total Current Liabilities	419,137.11
Total Liabilities	419,137.11
Equity	
Net Assets	20,000.00
Retained Earnings	2,985,588.82
Temp. Restricted Net Assets	247,501.29
Net Income	-103,480.66
Total Equity	3,149,609.45
TOTAL LIABILITIES & EQUITY	3,568,746.56

3:30 PM

04/09/21

Accrual Basis

Austin Groups for the Elderly
Profit & Loss
 January through February 2021

	<u>Jan - Feb 21</u>
Ordinary Income/Expense	
Income	
Allocated Rents	28,500.00
Corporate	2,365.78
Emergency Funding - COVID 19	30,000.00
External Rents and Fees	21,341.84
General Contributions	5,255.77
Grant Revenues	118,000.00
Memory Connections	6,650.00
Miscellaneous Income	478.49
Privately Funded Service Fees	12,235.78
Publicly Funded Service Fees	8,023.55
Sponsorships/Event Revenues	1,100.00
Total Income	<u>233,951.21</u>
Gross Profit	233,951.21
Expense	
Activity Expenses	21.62
Board & Employee Development	3,095.02
Copier Lease & Printing	5,356.47
Dues, Fees, Permits	1,566.72
Employee Benefits	17,153.69
Food & Food Supplies(ADHC only)	5,183.26
Fund Raising Expenses	963.70
Insurance	7,456.12
Office Expenses	1,284.06
Outreach	3,389.12
Payroll Expenses	186,947.79
Professional Fees	14,370.35
Program Supplies & Equipment	1,413.20
Rent	37,670.00
Repairs & Maintenance	10,952.74
Technology Services	8,736.90
Utilities	4,811.88
Vehicle Operation	5,777.29
Total Expense	<u>316,149.93</u>
Net Ordinary Income	-82,198.72
Other Income/Expense	
Other Income	
Comprehensive Campaign Revenue	15,014.41
Total Other Income	<u>15,014.41</u>
Other Expense	
Comprehensive Campaign Expenses	36,296.35

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04/09/21
Accrual Basis

Austin Groups for the Elderly
Profit & Loss
January through February 2021

	Jan - Feb 21
Total Other Expense	36,296.35
Net Other Income	-21,281.94
Net Income	-103,480.66

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04/09/21

Accrual Basis

Austin Groups for the Elderly

Balance Sheet

As of February 28, 2021

	Feb 28, 21
ASSETS	
Current Assets	
Checking/Savings	
Donated Gift Cards	2,326.62
Operating Checking/Savings	427,512.70
Restricted Cash	461,670.56
Total Checking/Savings	891,509.88
Accounts Receivable	
Accounts Receivable	30,173.86
Campaign Receivables	261,234.80
Total Accounts Receivable	291,408.66
Other Current Assets	
Deposits	40,372.40
Prepaid Expenses	4,091.99
Prepaid Insurance	27,304.83
Prepaid Rent for WC	13,755.00
Total Other Current Assets	85,524.22
Total Current Assets	1,268,442.76
Fixed Assets	
Accumulated Depreciation	-1,725,081.84
AGE Furniture & Equipment	82,358.14
Automobiles	388,852.64
Building & Improvements	1,246,776.31
CRC Furniture & Equipment	2,000.00
EHWC Equipment	32,686.02
Elderhaven Furn & Equip	33,958.83
Equipment & Furniture	21,999.13
Land	181,695.00
Leasehold Improvements - EHWC	87,095.86
Senior Net Furn & Equip	19,807.87
Total Fixed Assets	372,147.96
Other Assets	
Capital in Process	1,928,155.84
Total Other Assets	1,928,155.84
TOTAL ASSETS	3,568,746.56
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	6,268.50
Total Accounts Payable	6,268.50
Credit Cards	
Chase Business	8,387.98
Total Credit Cards	8,387.98
Other Current Liabilities	
Accrued Payroll	49,038.10
Payroll & Accrued Liab	41,058.87
PPP Loan	307,900.00
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Total Equity	<u>3,149,609.45</u>
TOTAL LIABILITIES & EQUITY	<u><u>3,568,746.56</u></u>

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04/09/21

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Profit & Loss
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Utilities	4,811.88
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Total Other Income	15,014.41
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Accrual Basis

Austin Groups for the Elderly
Profit & Loss
January through February 2021

	Jan - Feb 21
Total Other Expense	36,296.35
Net Other Income	-21,281.94
Net Income	-103,480.66

AGE of Central Texas			
2021 Budget			
Revenues			
	Contributed Revenue		
	General Contributions		187,000
	Conference Sponsorships		118,500
	Corporate Event Sponsorships		13,000
	Corporate Grants/Gifts		27,000
	Emergency Funding		200,000
	Grants		942,000
	Total Contributed Revenue:		1,487,500
	Earned Revenue		
	Allocated Rent		171,000
	External Fees & Rents		102,000
	Investment & Interest		300
	Miscellaneous Income		3,700
	Memory Connections/Virtual Connections		55,500
	Private Fees		248,800
	Public Fees		248,800
	Total Earned Revenue:		830,100
	Total Revenue for Ops:		2,317,600

Expenses		
	Activity Expenses	24,350.00
	Board & Employee Development	7,300.00
	Copier, Printing, Postage	35,700.00
	Dues, Fees, Permit	5,000.00
	Employee Benefits	121,000.00
	Food & Food Supplies	71,600.00
	Fundraising	80,000.00
	Insurance	42,000.00
	Office Expenses	11,000.00
	Outreach	24,000.00
	Payroll Expenses	1,350,650.00
	Professional Fees	63,000.00
	Program Supplies & Equipment	20,500.00
	Rent	226,000.00
	Repairs & Maintenance	58,250.00
	Reserve	10,000.00
	Technology Services	62,000.00
	Utilities	62,000.00

	Vehicle Operation	62,800.00
	Total Operations Expense:	2,337,150