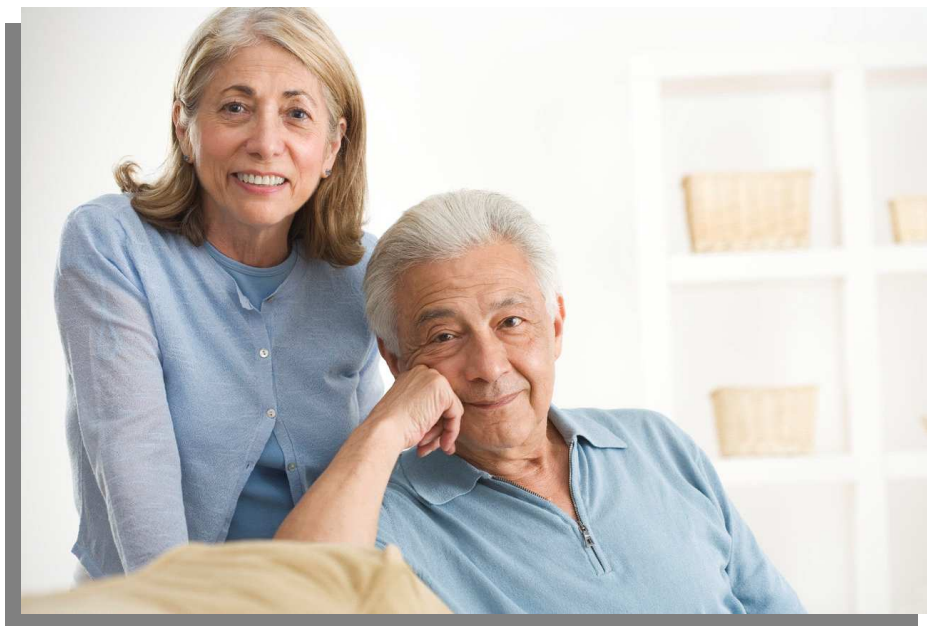


# Central Oregon Council On Aging



## **COCOA**

1135 SW Highland Ave., Redmond, Oregon 97756

Phone: 541-548-8817

Website: [www.councilonaging.org](http://www.councilonaging.org)

Prepared by: Dhyana Kearly

# ANNUAL REPORT

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Fiscal Year 2007-2008

## Who We Are



*The Council on Aging is the only agency in Central Oregon based at the local level which is in business to promote and support an older person's ability to lead a dignified, safe, healthy and independent life. The agency's 23 employees, along with nearly 700 volunteers, provide a variety of services designed to help keep seniors living independently and in their own homes for as long as possible.*

COCOA is one of only two stand-alone AAA (Area Agency on Aging) non-profit organizations in Oregon.

## Mission Statement

*We are a private nonprofit organization and the designated Area Agency on Aging (AAA) under the Older American Act of 1965, responsible for providing services to meet the needs of senior citizens in the tri-county area of Central Oregon. Central Oregon Council on Aging (COCOA) seeks to meet immediate service needs for seniors while encouraging a maximum amount of self-help and independence. Our mission is to promote dignity, well-being, security and independence.*

## Services We Provide

- Nutrition
- Meals-on-Wheels
- In-Home Services
- Information & Referral
- Senior Center Programs & Services
- RSVP—Retired & Senior Volunteer Program

# 2007-08 HIGHLIGHTS

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## Number of Seniors Served

During the 2007-08 fiscal year it is estimated that we had approximately 25,956 documented 'senior moments', or that many unduplicated exchanges for information, meals served or services provided. Bear in mind that services are delivered on an on-going and day-to-day basis; assistance and services are provided on a daily/weekly/monthly and emergency basis.

## Major cost-saving accomplishments realized include:

- Creating a "for-fee-open-to-the-public" salad bar at Bend;
- Increased donation request from \$2.50 to \$3.50;
- Prepare frozen meals rather than purchase them for our nutrition participants.

## Centralized Kitchen Services

After conducting extensive research and evaluation of the COCOA nutrition program, including a critical review of the program expenses, as well as methodology of food preparation and service, staff determined that one very significant way to cut costs and eliminate food waste would be to move forward with plans for centralized kitchen services.

Meals for the Redmond and Sister's meal sites have been prepared at the Redmond kitchen for some time, while a food catering company has traditionally provided the meals for the Bend and La Pine sites, as those sites lack adequate kitchen facilities. Over the years it has become more and more apparent that one way to cut costs, eliminate food waste, control and better utilize food inventories, would be to prepare food in our own local kitchen and then transport that food to meal sites. Recognizing that our highly qualified and experienced Redmond Senior Center staff have successfully prepared meals for many years, plans for a kitchen expansion project got underway in the spring of 2007 with funding provided primarily out of reserves from a larger senior center remodel effort which began four years previous. In the first experimental phase of the centralized kitchen project meal prep for the Madras site began that August. Quickly realizing a success with the first phase, we became ever more convinced of the necessity of realizing the dream of fully functioning centralized kitchen.

The full kitchen renovation began in November of 2007 at the Redmond site. In preparation for this expansion the kitchen was remodeled to include a new double convection oven and a holding oven. We have also purchased food transport carriers both hot and cold, and miscellaneous pots and pans, sheet pans, and utensils, all geared toward facilitating food preparation on a larger scale. A new walk-in refrigerator/freezer has been acquired and will be installed in November of 2008 and full-scale meal preparation is set to get underway at the first of the year. At that time, meals for all five meal sites, as well as food for all Meals on Wheels clients will be prepared at the Redmond Senior Center's new centralized kitchen.

By taking on the task of creating a centralized kitchen preparation program COCOA is eliminating the need to contract out meal preparations to a food catering company, as has been the case since 1997. Estimated immediate and annual savings for providing centralized kitchen services to meal sites is \$25-30K/year.

# COCOA PARTNERS AND SUPPORTERS

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For more than three decades Central Oregon Council on Aging has provided vital resources for seniors in Crook, Deschutes and Jefferson Counties. The ability to provide such specialized services is only made possible by the on-going commitment and generous support of our partners and donors.

## 2007-08 Partners and Supporters Include:

- Deschutes County Commissioners
- Commission on Children & Families
- Oregon Business Energy Tax Credit
- Klamath Falls MOW
- Extended Hands
- Fred Meyer Foundation
- Samuel S. Johnson Foundation
- Jefferson County United Way
- Jefferson County Transportation Funds
- Deschutes County United Way
- SHIBA
- Sterling Savings Bank

## New or Expanded Partnerships:

- Central Oregon Intergovernmental Council
- City of Redmond,
- Jefferson County Commission
- Deschutes County
- Interfaith Volunteer Caregivers
- Time Traders
- Central Oregon Home Health and Hospice
- High Desert Museum
- Oregon State University
- Ministerial Association of Redmond
- Oregon State Representative
- Oregon State Senator
- Oregon Public Broadcasting
- AARP
- Sister's Steering Committee

## Additional Support provided by:

- The Bend Bulletin
- Clear Choice Health Plan
- Bend Broadband
- Whispering Winds Retirement
- 99.7 Mountain FM Radio
- Safe Haven Care
- Cascade Health Care Community
- Murray & Holt
- KBND News & Talk Radio
- Redwood Financial Services Inc.
- Duke Warner Realty
- Red Carpet Events

# THE COCOA FAMILY

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The COCOA Board of Directors meets on the fourth Thursday of each month, except in November and December when meetings are held on the third Thursday, due to the holidays. The COCOA Advisory Council meets on the first Friday of each month with a recess period taken in July and August.

## Advisory Council

### Deschutes County/Bend

Joan Rubira  
Fill-in Term expires 2009

Virginia Reddick  
1<sup>st</sup> Term expires 2010

### Deschutes County/Sisters

Open Position  
1<sup>st</sup> Term expires 2010

Carole Goodman (Chairman)  
2<sup>nd</sup> Term expires 2009

### Deschutes County/La Pine

Dixie Byers  
1<sup>st</sup> Term expires 2008

### Jefferson County/Warm Springs

Lucille Schuster  
1<sup>st</sup> Term expires 2009

### Jefferson County

Dick Montee (Vice Chairman)  
2<sup>nd</sup> Term expires 2010

Shirley Williams  
1<sup>st</sup> Term expires 2008

Louise Muir  
2<sup>nd</sup> Term expires 2009

### Crook County:

Karole Stockton  
1<sup>st</sup> Term expires 2008

### At-Large

Ruthanna Warnock  
1<sup>st</sup> Term expires 2008

Kelly Barnett  
First Term expires 2008

### Seniors & People with Disabilities Liaison

Heather Williams

### Governor's Commission Liaison

Charles Frazier

### Deschutes County/Redmond

Open position

## Board of Directors

### Deschutes County - Redmond

Jerry Thackery (Vice President)  
2<sup>nd</sup> Term Expires 2010

### Deschutes County - Bend

Open Position  
Fill-in Term Expires 2010

Jeanne Merritt (Treasurer)  
1<sup>st</sup> Term Expires 2009

Nancy Webre (Secretary)  
2<sup>nd</sup> Term Expires 2008

### Deschutes County - La Pine

Joe Bales  
Fill-in Term Expires 2008

### Deschutes County - Sisters

Roger Fairfield  
1<sup>st</sup> Term Expires 2010

### Crook County

Open Position  
Fill-in Term Expires 2008

### Jefferson County

Open Position  
Fill-in Term Expires 2009

Bob Jackson  
1<sup>st</sup> Term Expires 2009

Walter Ponsford  
1<sup>st</sup> Term Expires 2008

### At-Large

Gordon Phillips  
2<sup>nd</sup> Term Expires 2008

Paul Svendsen (President)  
1<sup>st</sup> Term expires 2009

Rose Marie Depp  
1<sup>st</sup> Term expires 2010

Pat Croll  
2<sup>nd</sup> Term Expires 2008

### COCOA Advisory Council Representative

Carole Goodman

### RSVP Advisory Council Representative

Renata Beck

# SERVICES, PROGRAMS & PROJECTS

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## Nutrition



The total number of meals served in 2007-08, both congregate (via senior centers and local meal-sites) as well as home-delivered (Meals-on-Wheels) was 132,094.

**Congregate Meals** – This program offers a hot meal, 3-5 times weekly, at senior centers throughout the local area. This meal meets recommendations for dietary allowances in a congregate setting. All seniors may participate as the objectives also include socialization, education and referral services for all seniors.

**Meals-on-Wheels** - These meals are provided to approximately 626

homebound seniors 7 days a week. In this fiscal year the total number of clients increased by 20 percent. The reason for this increase is a result of better communication with hospitals and other facilities in planning and meeting the needs of discharged clients who benefit from short-term services that help speed their recovery. This program benefits from a more diversified funding base than some others. The main source is from the Older Americans Act, the US Department of Agriculture, program income, United Way, as well as donations and other fundraising.

## Transportation

**Dial-A-Ride (DAR)** – From a management perspective, this program has expanded to the point that it was a ready candidate for contracting and/or incorporation into a broader transportation planning and delivery system. As a result, we have contracted the service to Central Oregon Intergovernmental Council (COIC). COCOA's task is to ensure that the interests of our clients are protected under the new system.

The move of COCOA's transportation program to COIC provides seniors with increased transportation options. COIC has been able to expand the service hours to operate from 7:30-5:30 five days a week. They also offer shuttles to Bend from Madras, Prineville, Redmond and La Pine 5 days a week and from Sisters 2 days a week. This allows the seniors far more access to medical services and meets the challenge of our strategic plan to enhance the well-being of area seniors. It also allows COIC to leverage the dollars from COCOA to receive ODOT grants for further expansion of the transportation program that not only benefits seniors, but the community as a whole.



## In-Home Services



During the past year, as demand for in-home services has steadily increased throughout our region, and with no actual increase in funding for programs, we have sought to supplement our in-home care programs through enhanced community partnerships with a greater reliance on volunteer assistance.

**Case Management** - This is not an operational program per se, rather it is an essential service available in-person at senior centers and by phone. The costs are the salaries of five case managers who work on the "frontline" in six communities, coming into daily contact with our clients. The case managers (1) identify the most vulnerable who are eligible for assistance from one of COCOA programs; (2) provide referrals; (3) arrange services; (4) coordinate services among various individual and other providers, and (5) provide follow-up to ensure needs are met.

Case managers provide services in six communities to more than 100 people. In allocating case worker time to particular cases and areas, COCOA takes into consideration the network of support services available to the client. We allocate relatively more staff time to under-served areas.



1-**Oregon Project Independence (OPI)** is designed to provide low-income seniors not qualified for Medicaid with limited housekeeping and personal care. In this program we expanded our contractor housekeeping and personal care services to five commercial in-home services providers. We currently contract with Assured Quality Care, Inc., At Home Care Group, One Step At A Time, Home Instead Senior Care, and Safe Haven In-Home Services.

Whenever possible COCOA has utilized Contractor Employed Providers (CEP's). CEP's undergo a registration process and are thoroughly screened by our agency before being placed into service. These individual home care workers are less costly and most appropriate for uncomplicated service requirements. Under these arrangements, service has been consistent and effective.

2- **National Family Caregiver Support Program (NFCSP)** This program supports respite breaks for family or personal caregivers who are solely responsible for the full time care of an eligible senior and provides 290 hours of service per year for about 68 families at a given time. The principle beneficiaries are those with dementia or Alzheimer's disease. We were able to expand the program with the help of Lifespan Respite of Bend to include grandparents raising grandchildren. In the process, we provided services to eight families in this situation.

While there is a national emphasis supporting this program and a growing need for these services, funding sources are limited with anticipated further budget reductions in the coming year. Projections for future OAA funding for this program are pessimistic.



3- **Home Delivered Meals**, or more commonly called 'Meals-on-Wheels', a designated nutrition program under the Older American Act, continues to be an integral part of our in-home services, supplementing Oregon Project Independence (OPI) and Respite Care in support of COCOA's overall Mission. These three programs enable seniors to live in their homes as long as possible.



It has been statistically proven that living in a home environment increases longevity while reducing institutional living costs by a factor of 30-40 percent, a cost which either families or taxpayers traditionally bear. Finally, and most importantly, this style of living significantly improves the quality of life for our seniors. In short, people live longer and are generally happier in their homes than in any living facility. Additionally, case management staff and central office, provide services to all six communities in Central Oregon, including free referral services to seniors seeking help in areas beyond the scope of COCOA's charter.

## Disaster Preparedness

Since 2006 COCOA has served as chair for the Tri-County Disaster Preparedness For Vulnerable Populations Working Group, with the goal of raising the level of awareness in matters of emergency. We have identified the most vulnerable seniors (most likely to be unable to protect themselves in an emergency) and have prepared a community alert list for the emergency planners/911 centers of Crook, Deschutes, and Jefferson Counties. We are now in the process of developing our own agency-wide disaster response plan and are on a campaign to raise awareness so that the seniors we serve will be better able to respond to an area emergency. With the support of a grant from Deschutes County Health Department COCOA will be furnishing free emergency evacuation kits to our most needy seniors this winter.

## Information, Assistance & Referral

### Senior Center and Meal Site Information and Assistance (I&A) –

Last year COCOA handled over 78,093 calls answering questions and/or referring clients to other service providers. The approximate number of staff and volunteer hours dedicated to providing information and assistance was 5,267 during the past fiscal year.

Services provided by site coordinators and staff include answering a range of questions and responding to the demand for information. COCOA staff believes that information services are the “growth” portfolio of the future and that additional training and resources are needed for staff and volunteers who provide this important service. Staff estimates that about 5 percent of their time is devoted to information dissemination.



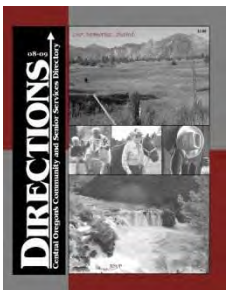
### Senior Help Line (Information & Referral)

The total number of Information and Referral calls handled by the Senior Help Line Operator from the COCOA Central Office during the past fiscal year was 1,721. With average duration of calls lasting about four minutes, that translates into 115 staff hours dedicated to answering questions and helping people locate the community resources and assistance they need.

Seniors or their caregivers can find out about eligibility for benefits and the full range of available services with a single phone call to the COCOA Senior Help Line. Responses are tailored to individual needs. Typical topics of request for information and referral handled by our I&R and I&A Operators includes:

- Senior Lunch Programs
- Home Delivered Meals
- Transportation
- Educational Opportunities
- Home Care/Respite
- Employment Information
- Benefits
- Government Programs
- Medicare/Medicaid
- Lawyer Referral
- Health Care
- Housing
- Volunteerism & Leisure Activities
- Assisted Living
- Crisis Intervention
- Support Groups
- Ombudsman
- Local Senior Centers
- Financial Assistance
- Referral to Services for People Living with Disabilities

**Health Insurance Counseling - SHIBA** (Senior Health Insurance Benefits Assistance) The Council on Aging offers counseling to resolve problems with supplemental insurance, Medicare claims or bills, doctor's bills, and problems with insurance companies regarding the payment of bills. Most recently, the agency provided assistance to seniors in the enrollment of Medicare programs at age 65 as well as during the annual Medicare Prescription Drug Program (Part D) enrollment period.



### Senior Directory Publication

Today, Central Oregonians are healthier, more active and more prepared for retirement than ever before. But whatever their stage or age in life, people often need information and assistance to experience the greatest quality of life possible. It is not always easy to determine what services a senior, a caregiver or family member might need. It's equally difficult to know where to turn to find the kinds of vital services an aging Oregonian might need. The COCOA bi-annual publication called ‘Directions’ is focused on pointing people in the right direction.

This highly sought after publication provides just the kind of information seniors need for making necessary community connections. The newly revised issue includes up-to-date internet websites and email addresses, expanded services, plus the most current descriptions of services provided by the various organizations and businesses. It also contains updated general information for senior service providers who care for the citizens of Central Oregon. This year 12,000 copies were printed and are distributed to local outlets and senior centers all over the tri-county area.

Although the publication is provided free to consumers, the actual production costs for Directions is about \$2 per copy, and no donations have been solicited to cover expenses to this point. Funds raised through advertising helped to pay for the 2007/08 edition.

### **COCOA Website**

Providing information to area residents is important, and to stay ahead of the tech curve we offer a full range of up-to-date information about COCOA services, events and programs on our website which is available by visiting [www.councilonaging.org](http://www.councilonaging.org). The COCOA website hosts about 600 visitors per month (7,200 average hits annually) with about 1,519 page views per month (or 18,228/yr). Information pertaining to services for seniors in the tri-county area is also available through the COCOA database of services found at the Network of Care website.

### **Senior Center Programs & Services**



#### **Services Include:**

- Lunchtime meals
- Support Services
- Nutrition Services
- Case Management
- Transportation
- Health and Independence
- Advocacy & Information
- Community Enrichment
- Senior Volunteer Opportunities
- Home Based Services

Staying involved, keeping active and cultivating a social group are all important factors to maintaining an older adult's health and well-being during the retirement years. Senior Centers are often the focus of community spirit for our clients. Activities, services and programs are just some of the benefits managed for seniors by COCOA Site Coordinators at facilities including La Pine, Redmond and Sisters. Generally, Senior Center programs and services located in Bend, Madras, Crooked River Ranch, Warm Springs and Prineville are managed by outside agencies and organizations, but they all enjoy a partnership with, and are supported in a variety of ways by COCOA.

In May 2008 COCOA created a Volunteer Center in the Redmond Senior Center consisting of Interfaith Volunteer Caregivers and Time Traders (Redmond Community Action Team). The new Volunteer Center helps to ensure an availability to a network of volunteers for senior services. It also provides a convenient way for seniors to learn more about volunteer opportunities available to them through these organizations.

### **RSVP—Retired & Senior Volunteer Program**

RSVP (Retired & Seniors Volunteer Program) is a federally funded program sponsored by Central Oregon Council on Aging. This senior volunteer program is geared toward active and retired persons age 55 and over, living in the Deschutes County area. The goal of RSVP is to provide skilled volunteers to organizations in the Deschutes County area, keeping the skills and talents of volunteers in mind to create a good match.

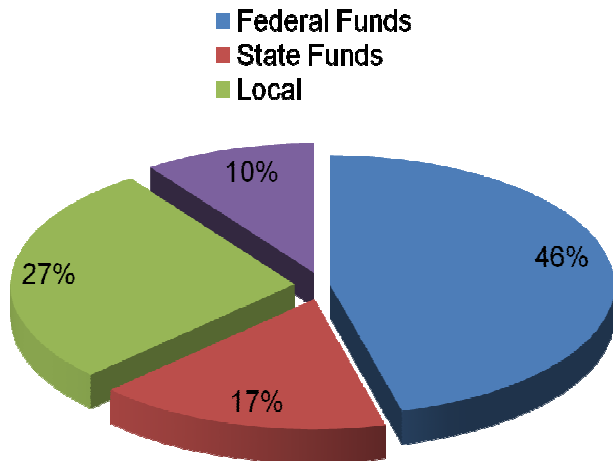
RSVP was incorporated into the Redmond headquarters of the COCOA during the first week of May 2008. There are currently 677 volunteers serving 124 agencies in Deschutes County.

# FINANCIAL REPORT

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COCOA relies on a variety of sources for funding an array of programs and services. The majority of funding for Council revenues stream from two sources—the Older Americans Act (OAA) and the State of Oregon Biennial Budget. The state serves as the conduit for federal funding and also provides the resources for Oregon Project Independence (OPI). Other major funders include a number of recurring grants and income from fund raising and other sources.

## Revenue



Federal Funds	\$803,289	45.9%
State Funds	\$293,048	16.8%
Local	\$480,501	27.5%
Program Income	\$171,354	9.8%
<b>Total</b>	<b>\$1,748,192</b>	

### ***Federal Funds***

OAA	\$628,438
Title XIX	\$30,097
UDSA	\$89,052
KMSC Contract	\$4,371
RSVP	\$51,331
<b>TOTAL</b>	<b>\$803,289</b>

### ***State Funds***

OPI	\$293,048
<b>TOTAL</b>	<b>\$293,048</b>

### **TOTAL FEDERAL & STATE FUNDS**

**\$1,096,337**

### ***Local Funds, Program Income, Grants, United Way, Fundraising***

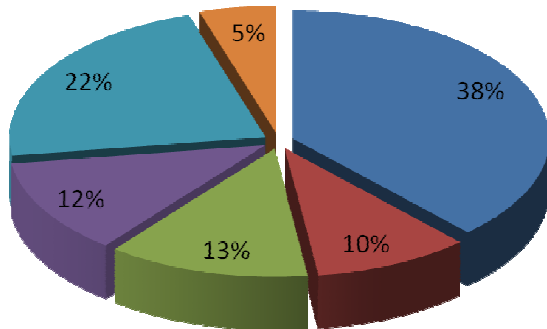
STF Funds	\$61,245
United Way	\$65,787
Fundraising	\$159,106
Interest, Refunds, Other Rev. & Beg. Cash	\$71,508
Special Grants/Bequest	\$90,355
City & County Contributions	\$32,500
<b>TOTAL</b>	<b>\$480,501</b>

### ***Program Income***

**\$171,354**

## 2007-2008 Expenditures

■ Nutrition Programs   
 ■ In-Home Services   
 ■ Case Management  
■ Transportation   
 ■ Other Senior Services   
 ■ Administration



Nutrition Programs	\$711,916.00	38%
In-Home Services	\$184,033.00	10%
Case Management	\$238,410.00	13%
Transportation	\$224,413.00	12%
Other Senior Services	\$419,587.75	22%
Administration	\$90,979.00	5%
	\$1,869,338.75	100%

	total	
<b>Nutrition Programs</b>		<b>\$711,916</b>
Congregate	\$380,875	
Home Delivered Meals	\$331,041	
<b>In-Home Services</b>		<b>\$184,033</b>
In Home Care	\$127,575	
Personal Care	\$21,800	
Chore/Home Repair	\$1,442	
Respite	\$33,216	
<b>Case Management</b>		<b>\$238,410</b>
Case Management	\$191,563	
Outreach	\$46,847	
<b>Transportation</b>	\$224,413	<b>\$224,413</b>
<b>Administration</b>	\$90,979	<b>\$90,979</b>
<b>Other Senior Services</b>		<b>\$419,588</b>
Advocacy	\$209,621	
Ombudsman	\$2,971	
I&A	\$62,664	
Legal	\$4,200	
Health	\$10,667	
RSC	\$34,616	
RSVP	\$94,848	

# COCOA ACHIEVEMENTS

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## Nutrition

- 69,025 Meals on Wheels meals delivered , 626 people served
- 65,112 meals served at meal sites, 3,647 people served
- Madras and Sisters moved onto central kitchen

## Transportation

- Transitioned Dial-a-Ride to COIC to expand transportation options for seniors

## In-Home Services

- 16,360 hours of In-home care
- 290 hours of Respite Care provided to 68 families

## Information & Referral, Information & Assistance

- Number of Central Office Calls: 1,721                      Hours of Service: 115
- Number of Senior Center and Meal Site calls: 79,093
- Total: 5,012 people served
- Technology Upgrades: Utilized new systems to reduce travel costs, streamline information flow, provide for online pay capability, increased content

### Number of persons assisted

- |                            |       |
|----------------------------|-------|
| • Tax Assistance           | 4,549 |
| • Insurance Benefits/SHIBA | 869   |
| • Caregivers               | 499   |

## Senior Center Programs & Services

- Volunteer center created at Redmond Senior Center

## RSVP—Retired & Senior Volunteer Program

- RSVP moved to central offices
- 700+ volunteers serving in over 130 area agencies

## Additional Achievements

- \$34,000 in in-kind advertising with The Bulletin, Combined Communications & Bend Broadband
- Master grants for Central Kitchen, CO GAP, Bend Broadband high-speed
- Outsourced payroll to reduce cost and liability and increase employee services
- Exceeded previous year fundraising efforts: \$159,106

# 2008-09 GOALS & CHALLENGES

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## GOAL Highlights

- Functioning centralized kitchen facility w/Bend and La Pine transitioned to central kitchen service.
- Expand frozen meal program to include for-profit activity
- Integrated '211' I&A system
- Sustainable donor-based fundraising system to augment current fundraising
- Support a working Central Oregon Guardianship and Assistance Program (COGAP)
- Continue to expand strategic partnerships
- Continue to expand use of technology to lower cost, increase information flow
- Explore central office lease alternatives
- Explore feasibility of publishing Directions annually
- Ensure transportation for those most in need
- Provide inter-city transportation;
- Continue to liaise with officials to ensure that the new Bend public transportation system meets the needs of seniors and those with disabilities

## Meal Site Attendance

COCOA plans to encourage increased attendance at the community centers and meal sites by expanding the types of activities offered by COCOA and community partners. This emphasis will incorporate the preferences and interests of the “boomers” who are joining our client population for the first time. We plan to experiment with non-traditional meal presentations and times (e.g., salad bars, buffets, extended meal hours). We also plan on testing “for-profit” food services that are open to the public as a way of helping our centers become more self-reliant.

## Challenges

The demand for services continues to rise at a record pace and COCOA remains committed to doing the best job possible with the resources available. We continue to seek new funding sources and look for ways to partner within the community to use our resources in the most cost effective way possible. Our efforts to recruit and place volunteers will also continue as we pursue new ways to engage individuals and the community.

- Currently, the tri-county senior population is in excess of 35,000 people and is expected to grow by an additional 10,000 seniors before 2010. Given current trends, the senior population will grow to well over 100,000 in the next 30 years.
- Improvements in healthcare and lifestyle options have significantly extended the lifespan of the aging population. Consequently, a far greater number of seniors are at risk of outliving their resources, which will drive up the demand for COCOA core services.
  - Summer/Fall Oregon State Special Legislative Session; 3-10 percent budget reduction
  - Diminishing federal resources
  - Increasing food and fuel costs



*Promoting the dignity, well-being, security and independence of Central Oregon Seniors since 1975.*

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