



Annual Report— July 1, 2014 – June 30, 2015



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Summary

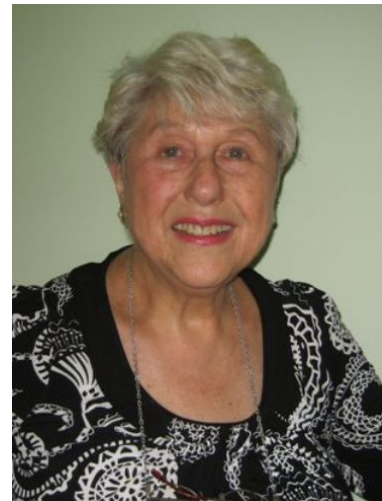
The Center for Advocacy for the Rights and Interests of the Elderly (CARIE), is a nonprofit organization, based in Philadelphia, dedicated to improving the quality of life for vulnerable older adults. Founded in 1977, CARIE has emerged as one of the region's leading resources on elder care issues.



While serving the interests of all older adults, CARIE targets the most vulnerable elderly including the low income, very old, those with physical, cultural, or language barriers who have no one else to advocate for them. CARIE's core mission is: to improve the wellbeing, rights and autonomy of older persons through advocacy, education, and action.

Pictured above and right: Ms. Terri Ivers, 84, one of CARIE's first SMP volunteers when the program began in 1997 died this past May. Ms. Ivers spent countless hours volunteering for CARIE and other organizations. She was an outspoken advocate and made sure that she got her message across. She educated hundreds if not thousands of beneficiaries to protect their personal information, watch for signs of health care fraud, and learn more about their benefits. We miss her.

On the following pages, you will see some of the ways that we worked to serve our mission and those who so desperately need our help.



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Direct Advocacy Programs

The **CARIE LINE** is a unique client-centered, telephone consultation and advocacy service for older adults, caregivers and professionals providing frail and vulnerable older adults and educates consumers, caregivers and professionals about the rights of the elderly and their needs.

In FY 2015, the CARIE LINE served 2,274 older adults and family caregivers and addressed 3,006 problems. Among problems, 99% were completely resolved. Nearly 900 older victims of crime and abuse were provided with comprehensive victims services. CARIE LINE staff presented or participated in 95 educational programs and information fairs reaching 2,417 older persons, caregivers and professionals with critical information.

The **Long-Term Care Ombudsman Program** is a federally mandated program to provide advocates for long term care consumers through which CARIE represents more than 4,000 residents of 150 settings in Philadelphia.

In FY 2015, staff and volunteers handled 160 complaints from consumers, made over 523 visits to long term care programs, and provided information and consultation to 291 individuals and 42 service providers. The ombudsman program worked with four “PEER” programs to empower long term care consumers to serve as ombudsman for fellow residents. The Program planned CARIE’s annual “Golden Games” athletic competition (pictured right) for long term care consumers with more than 200 residents, staff and volunteers participating.



The **Pennsylvania Senior Medicare Patrol (SMP)** recruits and trains a corps of retired professional volunteers statewide to educate their peers about health care fraud and how to make reports.

In FY 2015, SMP volunteers and staff conducted 320 presentations and participated in information fairs that reached a total of 9,432 persons; and assisted 939 individuals one-on-one throughout Pennsylvania).

Systemic Advocacy

CARIE’s **Dorothy S. Washburn Legislative Committee** educates policy makers and monitors legislative and regulatory developments at the local, state, and national level in an effort to promote the wellbeing of older adults.

In FY 2015, CARIE distributed ten e-newsletters to more than 600 subscribers, and corresponded with 68 state legislators. Achievements of CARIE’s policy efforts include averting a SEPTA fare increase for shared ride and Para Transit services (benefiting all riders in Southeastern PA) and successfully advocating for \$50 million in additional funding for home and community based services for seniors in Pennsylvania’s 2014 budget.

CARIE staff participate in the Medical Assistance Advisory Committee (MAAC) Long Term Care Delivery Systems Subcommittee (CARIE serves as Vice-Chair). CARIE is involved in statewide advocacy campaigns such as the Senior Support Coalition and the Disability Budget Coalition and is also a member of PCA's Long Term Care Advisory Committee.

CARIE coordinates a public policy committee in the Lehigh Valley that meets monthly. In May 2013, the group held its first Legislative breakfast attended by about a dozen members of the legislature and staff and about 100 from the committee and community.

CARIE's executive director was appointed to serve on an Elder Law Task Force created by the Pennsylvania Supreme Court in April 2013 to "study the problems with guardianship, abuse and neglect, and access to justice being faced by older Pennsylvanians." In addition, she serves on the PCA Financial Abuse Task Force and the Montgomery County Elder Abuse Roundtable.

Among other initiatives CARIE accomplished the following:

- Comments were submitted on Pennsylvania's proposed transition plan for Home and Community-Based Settings (HCBS) on 9/16/14 and again on 3/20/15.
- In 10/14, CARIE and fellow members of the Disability Budget Coalition met with the Deputy Secretary and other PA Department of Aging staff and with the staff of the Office of Long Term Living to discuss budget issues and requests for next fiscal year.
- In 11/14, CARIE spoke with key staff at the Pennsylvania Department of Aging (PDA) and submitted recommendations and resources to help PDA in adapting its forms to be inclusive of an individual's gender identity (GI) and sexual orientation (SO) so that the Department can begin to expand standards of nondiscrimination and create a welcoming environment for all older Pennsylvanians.
- The Supreme Court Elder Law Task Force released its final report at a press conference in 11/14. CARIE's executive director served on the task force and was appointed to the newly formed Advisory Council for the Office of Elder Justice in the Courts.
- On 2/2/15 CARIE submitted comments about proposed amendments to the Aging Waiver to the PA Dept. of Human Services (DHS) Office of Long Term Living (OLTL).
- On 4/9/15, CARIE participated in a Senior Support Coalition (SCC) breakfast in Harrisburg to educate legislators and staff about home and community-based services, budget issues impacting older adults, and the SCC.
- On 4/13/15, CARIE sent a letter to Senator Toomey and Senator Casey about the Medicare Access and CHIP Reauthorization Act of 2015.
- CARIE was invited by the Pennsylvania Department of Human Services (DHS) Office of Long Term Living to participate in a stakeholder meeting on 5/7/15 to provide input into its proposed Home and Community-Based Settings Transition Plan.
- CARIE assisted in facilitating a White House Conference on Aging program, "Deepening the conversation on aging" on 5/28/15 sponsored by WHYY and Kendal Corporation.
- CARIE is a partner with the National Adult Protective Services Association, the National Center for Victims of Crime, and the International Network for the Prevention of Elder Abuse celebrating the First Global Summit on Elder Abuse held to commemorate the 10th Anniversary of World Elder Abuse Awareness Day on June 15th, 2015.
- On June 26 CARIE provided testimony at a DHS hearing about Managed Long term Services and Supports.

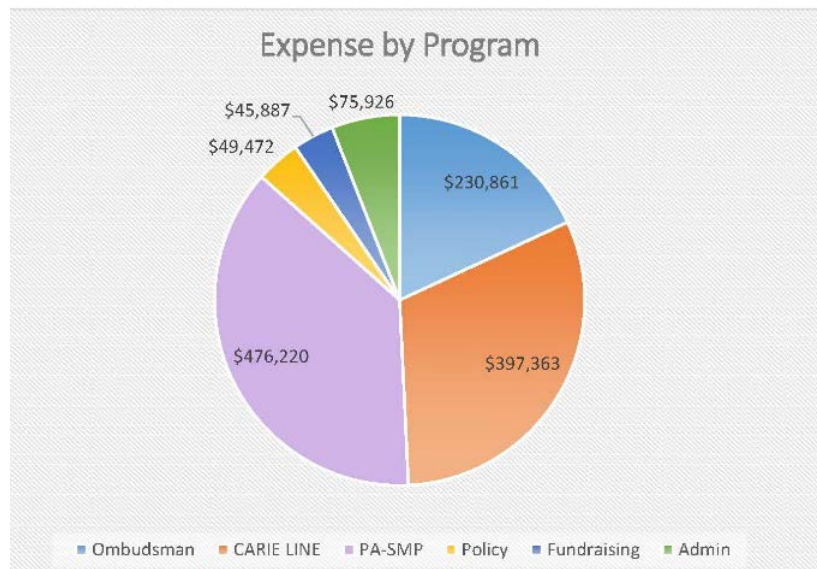
**CENTER FOR ADVOCACY FOR THE RIGHTS
AND INTERESTS OF THE ELDERLY
STATEMENTS OF FINANCIAL POSITION
JUNE 30, 2015 AND 2014**

ASSETS	2015	2014
CURRENT ASSETS		
Cash	\$ 106,034	\$ 91,700
Accounts Receivable	10,306	17,801
Contracts Receivable	72,098	97,530
Grants and Pledges Receivable	130,317	36,092
Prepaid Expenses	26,296	32,280
Total Current Assets	<u>345,051</u>	<u>275,403</u>
PROPERTY AND EQUIPMENT		
Office Equipment	86,025	77,754
Office Furniture	21,453	21,453
Leasehold Improvements	7,959	7,959
Website Development Costs	11,000	18,208
Total	<u>126,437</u>	<u>125,374</u>
Less: Accumulated Depreciation	50,034	52,127
Total Property and Equipment	<u>76,403</u>	<u>73,247</u>
OTHER NONCURRENT ASSETS		
Grants Receivable, Net of Current Portion	75,000	13,600
Beneficial Interest in Community Foundation	24,469	25,012
Security Deposit and Other	18,520	18,510
Total Other Noncurrent Assets	<u>117,989</u>	<u>57,122</u>
Total Assets	<u>\$ 539,443</u>	<u>\$ 405,772</u>
LIABILITIES AND NET ASSETS		
LIABILITIES		
Capital Lease, Current Portion	\$ 7,498	\$ 7,043
Line of Credit	-	29,000
Accounts Payable	36,697	37,076
Deferred Liabilities	28,404	10,887
Fiscal Sponsorship - LGBTQIE	2,812	34,699
Other Liabilities	2,500	12,500
Total Current Liabilities	<u>77,911</u>	<u>131,205</u>
LONG-TERM LIABILITIES		
Capital Lease, Long Term Portion	<u>24,746</u>	<u>32,245</u>
Total Liabilities	102,657	163,450
NET ASSETS		
Unrestricted:		
Board Designated	24,469	25,012
Undesignated	138,670	124,493
Total Unrestricted	163,139	149,505
Temporarily Restricted	273,647	92,817
Total Net Assets	<u>436,786</u>	<u>242,322</u>
Total Liabilities and Net Assets	<u>\$ 539,443</u>	<u>\$ 405,772</u>

Financial

Functional Expenses – FY 2015

Report



June 30, 2015

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Initiatives

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Executive Director

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Program Manager

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Carleta Foreman
Clerk

Morgan Hugo
Office Manager

Janet Lanier
Receptionist

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Advocate/Supervisor

Jennifer Hruslinski, JD, MSW
Advocate

Jasmine Jackson
Advocate

William McNeill
Advocate

Han Meadway, JD, MSW
Advocate

PA-SMP

Lynn Krantz
Program Assistant

Mariel Lorenz, MA
Volunteer Coordinator

Vanessa Miller, MSW
Volunteer Coordinator

Ombudsman Program

Mark Davis, Esq.
Ombudsman

Sharon Liebhaber, Esq.
Ombudsman

Millie Offray, MS
Ombudsman

CARIE's wonderful volunteers:

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Pam Bechtel
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David Bogdan
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Edward Callahan III
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 North City Congress
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 United Way Southeastern PA and Southern NJ
 US Department of Health and Human Services/Administration on Aging
 UU House Outreach Program
 W. W. Smith Charitable Trust
 Wesley Enhanced Living
 West Avenue Grille
 Western Association of Ladies for Relief and Employment of the Poor
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photos by Mark Garvin