

on Aging Alliance

living stronger, living longer



Our Message

I am proud of the Alliance Board and staff for their ongoing efforts to evaluate and manage resources. Through our completed Strategic Plan, we are addressing the changing needs of the growing aging population and we have a fresh look at how to be responsive.

Coping with uncertainty has challenged programs and services available to seniors this past year. Most certainly it has made the Alliance on Aging more cautious, focusing on preserving what we have and avoiding unnecessary risks. Your financial support and the dedication of our loyal staff and volunteers have made an important difference.

Transitioning from the “work world” to the retirement phase of life, can present challenges along with the care

of older family members, wading through the Medicare maze and governmental rules and regulations. Alliance on Aging can answer questions and advocate on your behalf as well as keep you informed of new issues that may impact your life quality.

Look to a strong, collaborative relationship with the Alliance on Aging. We are here to help you move through challenges in the year ahead.



Nancy Dalton,
Board President

*Every
10.3 seconds,
a “Boomer”
turns 60!*



Teresa Sullivan,
Executive Director

As we celebrate our 40th year of service to seniors in Monterey County, we must recognize those who have made this possible. Countless donors and supporters, dedicated volunteers and staff have from the beginning, driven our mission to promote independence, dignity and quality of life for our community of seniors. Our theme for this newsletter “living longer, living stronger” mirrors that legacy and our hope for all of those we serve.

2010 was a year of reflection as we look to the future for Alliance on Aging. As part of our planning we asked over 500 seniors to complete a survey so we could better understand how their needs have changed in this dynamic environment. Responses varied depending on age, income, geography or ethnicity. But there was a common theme. Seniors remain fiercely independent! They want to direct their own lives in their own homes for as long as possible. They want to continue to lead productive and meaningful lives and even help others when and while they can. They recognize that they currently do, or will need help, and turn to the Alliance on Aging.

In California where the cost of living for seniors is already twice that of other states, the downturn economy has had an even greater impact on them. So how do we reconcile their diminishing resources with their desire to remain independent? How does the Alliance continue to meet the needs of such a diverse group of seniors at a time when there are dramatic increases in their numbers and dramatic reductions in our funding?

Those are the provocative questions that tested the minds and hearts of the many who have worked diligently to produce our Strategic Plan. It is thoughtful, realistic and visionary and provides a fluid template to guide our actions for the next five years.

Some of the highlights for 2011 include the opening of an Alliance on Aging office in Salinas which will offer better access to those residents and the surrounding areas. Alliance on Aging will continue to actively explore programs that will fill the gaps in services to seniors. As well as expanding outreach efforts throughout the County, we will venture further into the world of social media with a retooled website, where you can link to join conversations on Twitter or LinkedIn. Please join us in our journey to the future.

Find us on our website:
AllianceOnAging.org
and sign up for our
email newsletter



*56% of
"Boomers" say
they will donate time
to community
service during
retirement*

*"Boomers"
make up 23% of
the population
of every state*

OUR PROGRAMS

**Community Outreach and Education
HICAP – Medicare Information and
Counseling
Ombudsman – Nursing Home
Information and Advocacy
Senior Employment
Senior Luncheon
Senior Peer Counseling
Tax Counseling for the Elderly**

Volunteers at the Heart of Alliance on Aging

Gandhi said, "The best way to find yourself is to lose yourself in the service of others." Alliance on Aging offers many paths to service. Our volunteers are the backbone of our services for seniors. If you would like to volunteer, please let us know and we will schedule a training session.

Health Insurance Counseling and Advocacy Program (HICAP), provides information, counseling and assistance with Medicare benefits at a number of locations in Monterey County. Volunteers play a vital role in meeting the high demand for help with Medicare and related insurance issues. We offer an extensive training program (24 hours), leading to certification as a HICAP Counselor. Please contact Tamara McKee, HICAP Manager if you are interested becoming a HICAP Counselor! She may be reached Monday through Friday at 831-655-4245.

Ombudsman protects the rights of individuals in long-term care facilities. We offer a 36-hour certification program for volunteers interested in participating in this vital community service. We are in particular need of volunteers in Salinas, and those who are bilingual in English and Spanish.

Please contact Jackie Woods, Ombudsman Program Director at 831-655-7560 for more information about upcoming Certified Ombudsman training.

*"The best way
to find yourself
is to lose yourself
in the service of
others." — Gandhi*

Senior Peer Counseling program has volunteer training courses starting soon. We're looking for those that are at least 40 years of age, are compassionate and are good listeners. We are in particular need of volunteers who are bilingual in English and Spanish. Training and supervision provided by mental health professionals. For more information please contact Sheryl Zika at 831-646-1458 or 831-758-4011.

Our **Outreach** program is seeking California State University Monterey Bay students interested in fulfilling their Service Learning requirements by assisting with outreach activities throughout Monterey County. Venues include fairs, fiestas, farmers markets, houses of faith, and more. Attendees at events are of all ages and represent multiple cultures and languages. Students are expected to participate at the leading edge of their respective knowledge, skills and expertise; and will hone their face-to-face communication skills, interview and research techniques. Throughout the experience the students will gain an appreciation for the unique challenges of growing older in America and the resources available to this sector of the population. For more information, contact Anton Prange or Genie Jimenez, Outreach Specialist at 831-236-6135.



Wellness Lecture



Medicare Counseling for Seniors

Community Outreach

Genie Jimenez, Outreach Specialist covers all corners of the County in her quest to reach people who might not know about or have access to senior services. Over the last year she has reached out to thousands of seniors and their families. She is often their first contact with the Alliance on Aging.

Genie travels the County in the “InfoVan” distributing printed materials in Spanish and English about the Alliance on Aging and other senior services in the County. She utilizes many venues in her outreach efforts including in-person contact, radio, television, community meetings, workshops, internet and print media. She meets with people individually, in small groups, or in groups as large as 500.

A typical contact can include guidance about our available services, a search through the labyrinth of services from other organizations, or additional information as simple as a phone number or web address. Genie can provide a quick field assessment of the client’s expressed needs to determine the best possible services available to the client.

You will see Genie at workshops, fairs or fiestas, health fairs, senior centers, political gatherings, farmers’ markets, schools, churches—just about anywhere people gather—enthusiastically engaging them in conversation about her favorite topic!

*Senior Peer Counselors
provided 1,474 individual
counseling sessions &
517 group sessions*

Community Education

2010 was another busy year for Community Educator, Bob Petty. Over 2,400 persons attended 70 **Community Education** events. With aging Baby Boomers rapidly increasing the number of seniors in our community, it’s not surprising that Boomer Education 101 was the most popular. Over 752 students attended six Boomer Education 101 minicourses covering Medicare, drug plans, Social Security, and long-term care insurance.

Concern about drug plans and changes to Medicare prompted over 700 to attend Medicare Update seminars during the last quarter. Health reform was the newest topic generating interest. Over 500 individuals came to hear about how the new laws will affect health care. We expect these topics to continue to be the “hot” ones in 2011.

In addition to live presentations, Bob provided community education through the monthly *HICAPsule* newsletter, radio spots on three different stations, and articles in local newspapers.

Salinas Senior Luncheon



1,800
seniors received
Medicare counseling for
a projected savings
of \$340,000

HICAP – Health Insurance Counseling and Advocacy Program

The Maze of Medicare

What do you do if your Medicare Part D plan were switched, unbeknownst to you, and the new plan debited your checking account over double the anticipated amount? The difference in these amounts can be whether you can buy groceries this month... or not. By the time our client realized what had occurred, another double debit was about to occur in 2 days. The drug plan indicated that they sent her a letter notifying her of the impending change. Given HICAP experience in helping this woman over the years, we know with confidence that if she had received a letter, she would have phoned us numerous times and left messages at all hours of the night. HICAP was able to help her reconcile the billing and get her back into the original less expensive coverage.

This is just one example of the many issues that we address at HICAP. We have more than 1,172 clients who call Alliance on Aging for help through the Medicare maze at no cost.

For more information call HICAP at 831-655-4245 or 831-758-4011.

Senior Peer Counselors



Senior Peer Counseling Program

“Dad has rediscovered meaning in his life since he has been meeting with the peer counselor. It is so good to see him smile again.” The Senior Peer Counseling program – utilizing the services of trained and supervised volunteers – provides individual counseling, support groups, and wellness workshops to strengthen the well-being of older adults. Sheryl Zika, Program Director applauds her 40 plus dedicated volunteers who draw from their experiences to help other older adults. Peer-to-peer counseling offers emotional support and guidance to people experiencing some of the challenges that accompany aging. Support groups provide a place to discuss common themes of aging while encouraging social connections. Sheryl reports “one of our support groups has been meeting for over 10 years.” Wellness lectures, presented by experts in the field, share information that promotes emotional resiliency and healthy aging. All services are offered in English and Spanish and are at no cost to the clients.

- 1,471 individual counseling sessions were provided at client’s homes, in offices, and at residential facilities last year. We will exceed that number in 2011.
- 18 new volunteer peer counselors were trained by mental health professionals, and four are bilingual.
- 5 support groups met regularly throughout the County.
- 4 Spanish-speaking wellness lectures were held in South County given by the following lecturers: John Silva, MD; Maria Runciman, LCSW; Liliam Perez, MD; and Lupe Covarrubias-Martinez .“
- A 2-part wellness workshop was facilitated by Patricia McDermott, LFMT and Lydia Davis, LFMT.

Senior Peer Counseling offers a comfortable, compassionate and effective counseling option that serves both the client and the volunteer. “I see people going through a lot of circumstances that are likely to happen to me as I get older. As a volunteer counselor, I feel like I am preparing myself for more of the issues that I will have to face.”

For more information about the Senior Peer Counseling program, call 831-646-1458 or 831-758-4011.

2,800
meals served at
our Tuesday luncheons
in Salinas

*Tax
counseling assisted
almost 1,200 seniors who
received over \$600,000
in refunds*

*Ombudsmen
provided 5,325
hours of complaint
investigation*



Digital Inclusion Class

Ombudsman

Ombudsmen are very special people! They advocate for the most vulnerable citizens, our seniors in local nursing homes and assisted living facilities. Ombudsmen make regular visits to these residents to ensure their best possible care and treatment. For some of these seniors, the Ombudsman is their only visitor from the outside. “I look forward to seeing the Ombudsman. He really listens to me and everyone listens to him.” Ombudsmen investigate complaints and act as a spokesperson for those who are without family or friends to speak on their behalf, or who fear abuse or retaliation if they complain. Jackie Woods, Program Director, recognizes the value of her volunteers. “They are our eyes and ears in these facilities and we would not be able to do what we do without them.”

- At any point there may be as many as 2,108 residents in our local skilled nursing and residential care homes
- 27 volunteer and 2 staff Ombudsmen make regular visits to the 16 skilled nursing facilities and 64 residential care facilities in Monterey County
- Ombudsmen spent 4,938 hours in complaint investigation on behalf of residents (those included allegations of abuse and neglect)
- By California State law, Ombudsmen serve as witnesses to Advance Health Care Directives for residents in Skilled Nursing Facilities
- Ombudsmen provided assistance and guidance to 205 family members looking for placement for their loved ones

Placing a loved one in a nursing facility can be one of the most heart wrenching experiences for any family. The Ombudsmen can provide local information and insights that can make this difficult task a constructive process for family members. For more information call 831-655-1334 or 831-758-4011.

Tax Counseling

According to Sarah Guzman, Coordinator of the Tax Counseling for the Elderly program (TCE) her volunteers are a special breed. “They thrive on the intensity of the tax season and find great satisfaction in helping seniors with their taxes. Last year, they assisted almost 1,200 seniors and facilitated over \$600,000 in refunds in about 10 weeks.”

For the last 34 years, the Alliance has sponsored this free tax service which assists low-income seniors in filing their state and federal tax returns. That translates into millions of dollars that have gone directly into the pockets of seniors over the years. For some seniors, their tax refund is the largest check they will receive all year. Many of them rely on it to pay bills that their monthly income will not cover.

Tax volunteers must go through training and pass a test to become certified to assist with tax preparation. Training is provided to the volunteers by the IRS and the State Franchise Tax Board. “We are very fortunate” said Sarah, “to have the staff at one of our local tax businesses, *Bay Tax Service*, provide space and assist with training every year.” They also serve as a resource to our volunteers throughout the season—all at no charge to us or our clients.”

These volunteers, many of whom are seniors themselves, inspire trust and make what can be an unpleasant experience for a senior, a very comfortable one. “My husband died a year ago and had always taken care of filing our taxes. I didn’t know where to go and my neighbor told me to call the Alliance on Aging. Their volunteer was so patient with me and I got my refund in a few weeks”.

For more information call Alliance on Aging Tax Counseling Program at 831-655-4241.

Senior Employment Training

“After my husband died, I realized I needed to get a job. My skills were rusty and I had not worked with the public in a long time.” The Senior Community Service Employment Program (SCSEP) helps seniors like this every day by placing them in paid on-the-job training in our local non-profits. These placements help them gain the skills and confidence they need to reenter the work place. It is a win/win proposition! While the seniors are getting training, they are also providing support to the host agencies and the clients they serve.

To qualify for the program, participants must be low income and at least 55 years old. They are paid an hourly stipend which is a boost to their limited incomes. Jerry Sera, Project Coordinator is proud of their work this last year. “In 2010 our training program started with 33 participants and ended the fiscal year with 58 participants. A 76% increase from last year! We added several new host agencies to accommodate that growth. We also recruited agencies that would accept monolingual Spanish participants which means we can now recruit Spanish monolingual seniors into our program.”

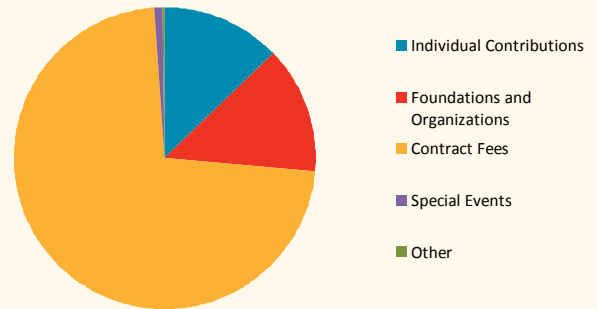
An exciting new addition to SCSEP is the Digital Inclusion Initiative (DII)—otherwise known as computer training. Under the mentoring of peer coaches, seniors get one-on-one training to help them to learn the basics of computers, email, and internet. Rose Riso, Program Coordinator states, “this program has opened up a new world to so many seniors. They are emailing family members and friends all over the country and the world.” Rose is proud of her peer coaches and their accomplishments this last year. In 6 sites (three in Salinas, one in Marina, Monterey, and Gonzales) over 540 students have been trained and 1,830 coaching sessions have been provided.

A 76 year-old student felt that he could never use a computer but attended a DII session anyway. He is now very proud that he can send emails to his friends and family. He said, “Without Alliance on Aging and the Peer Coaches I would never have had the opportunity to learn to communicate in our computer age.” For more information call 831-655-1334 or 831-758-4011.

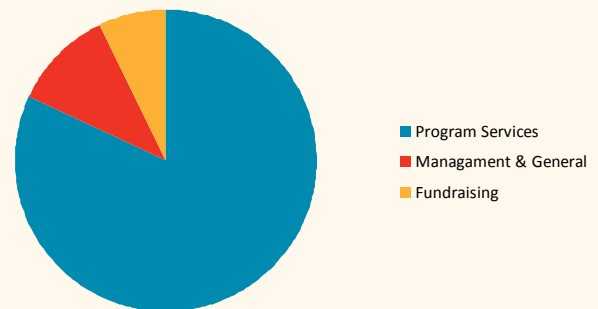
Seniors were paid training stipends of \$365,000

Financial Summary

FY09-10 REVENUE



FY09-10 EXPENSE



REVENUE

Individual Contributions	207,182
Foundations and Organizations	221,136
Contract Fees	1,179,195
Special Events	11,603
Other	4,915
	\$1,624,031

EXPENSE

Program Services	1,307,426
Management and General	170,558
Fundraising	114,840
	\$1,592,824

Surplus \$31,207

In-Kind Revenue \$442,965

When asked why he chose Alliance on Aging to include in his estate planning, Mr. Perry Flicker said, "Alliance on Aging is a wonderful asset in our community; they do an excellent job in providing services for seniors while making a positive difference in our lives. I'm so appreciative of their services; I thought it was the right thing to do to include them in my will."



Mr. Perry Flicker

Perry is a faithful diner at the Senior Luncheon in Salinas. He meets friends, enjoys excellent food and, occasionally, wins a cake at the weekly drawing.

Perry's philanthropic efforts reflect an exceptional selflessness and love for the people who live and serve seniors in our community. Won't you join Perry in the Legacy Society and make a lasting gift to Alliance on Aging?

Leaving Your Legacy — *Eric Holk*

Your charitable gifts to the Alliance on Aging are deeply appreciated and makes it possible for us to provide a wide range of services to our local community. Hopefully, your tax-deductible gifts to the Alliance also give you some personal satisfaction from assisting one of your favorite charities and knowing that you are helping to make the world a better place.

Have you considered including a bequest to the Alliance as part of your estate plan? Even a modest gift from your estate can help keep our services going well into the future. There are many ways to provide for such a gift, including:

- A direct bequest in your will or trust for a dollar amount or percentage
- Naming Alliance as a direct beneficiary of a life insurance policy or annuity (even a small percentage to the Alliance would be deeply appreciated!)

- Designating the Alliance as a primary or secondary beneficiary on a taxable IRA or other tax-deferred retirement account (anything that goes straight to charity will avoid the income tax that is otherwise due when such funds are distributed).
- Creating a charitable remainder trust with the Alliance as a charitable beneficiary.

We hope you will consider a gift to the Alliance out of your estate. Your gift could make a difference for generations to come!

Eric Holk, Attorney at Law is a Certified Specialist in Estate Planning, Trust and Probate Law. For more information, call him at 831-622-8808 or eric@trusts-etc.com

**WAYS TO GIVE AND BE PART OF
ALLIANCE ON AGING'S SUCCESS:**

Annual Gifts include direct gifts, honor or memorial tributes and pledges in the form of cash, check, credit card or gifts of stock, mutual funds or other appreciated property.

Matching Gifts can increase the value of your gift by taking advantage of your employer's matching gift program.

Planned Gifts can be made designating Alliance on Aging as your beneficiary in your will or life insurance policy.

Gifts-in-Kind are non-cash and can be certain donated goods and services.

on Aging Alliance

2200 Garden Rd. Monterey, CA 93940

Non-profit Organization
U.S. Postage
PAID
Permit No. 18
Monterey, CA 93940

ADMINISTRATIVE OFFICE

2200 Garden Road
Monterey, CA 93940
831-655-1334
831-655-8781 (fax)

MONTEREY OUTREACH OFFICE

280 Dickman Avenue
Monterey, CA 93940
831-646-1458
831-646-1232 (fax)

SALINAS AND SOUTH COUNTY

Call for appointments
831-758-4011

AllianceOnAging.org

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Celebrating 40 years of Excellence