



SENIOR FUND
ST. LOUIS CITY



REPORT

TO THE COMMUNITY



OUR VISION

The City of St. Louis is an aging-friendly city where older residents can age in place.



We are pleased to present our first *Report to the Community*.

In 2016, City of St. Louis voters approved a property tax for the purpose of providing programs which will improve the health, nutrition, and quality of life of persons who are sixty years of age or older. With this vote, St. Louis City joined 54 counties in Missouri that support older residents through senior levy funds.

Today the senior services tax generates approximately \$2 million in revenue a year, a portion of which is awarded to local nonprofits and government entities to help older adults age in the home and community that best serves their needs and interests.

This report presents a summary of the first two fiscal years for the St. Louis City Senior Fund, including our first year of grant awards. As we continue our work, our board and staff are committed to serving older residents with resources that meet important community needs, address gaps in services, and achieve the greatest impact towards our vision of an aging-friendly city.


William Siedhoff
Executive Board Chair


Jamie Opsal
Executive Director



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IN ADDITION TO HELPING US SERVE OLDER ADULTS IN THE CITY OF ST. LOUIS,

the St. Louis City Senior Fund has emphasized collaboration across agencies. They support and connect grant recipients that provide a diverse set of services, which strengthens the network of organizations serving older adults and addresses the range of needs each individual may have.”

*– David Ekin, Retired President
St. Louis Society for the Blind
and Visually Impaired*



TIMELINE

for Establishment of the St. Louis City Senior Fund

2013

DEC: Local foundation convened area non-profits to address growing demand for home and community-based services in the St. Louis region.

2014

New initiative, Seniors Count, formed to begin community education and consider policy options to address funding shortage for older adult services.

2016

Proposition S placed on ballot by local legislators in St. Charles County, St. Louis County, and the City of St. Louis.

NOV: City of St. Louis voters pass Prop S to establish a senior levy fund. The proposition did not pass in St. Charles or St. Louis counties.

2017

APR: Seven older City residents appointed by the Mayor of St. Louis to serve on St. Louis City Senior Fund's Executive Board.

MAY: First meeting of the Executive Board.

JUN: Board begins monthly meetings to complete process for establishing the Senior Fund, including bylaws, budget, staff role(s) and hiring, and selection of legal, banking, accounting, insurance, and other required services for operating the Fund.

JUL: Start of first fiscal year for the Senior Fund (FY2018).

DEC: Property taxes for senior services begin to be received; first source of revenue for the Senior Fund.

2018

JAN: First staff member, the Executive Director, is hired.

Consultant hired to facilitate strategic planning for the Senior Fund; process includes identifying priority focus areas for grants based on community needs assessment completed in 2015 and other sources*.

Group of community advisors with experience in senior services invited to work with the Executive Director and the Program and Grants Committee.

FEB: First funding priority areas approved: Fall Prevention and Economic Security.

MAR: FY2019 grant opportunity released and application workshop held.

MAY: Grant applications due; received 25 submissions.

JUN: FY2019 grant awards approved for 17 organizations; a total of \$736,729 in awards.

JUL: Start of second fiscal year for the Senior Fund (FY2019); First disbursement for grant awards are released.

SEP: New priority areas approved for FY2020 funding: Social Isolation and Homemaker Chore Services.

OCT: FY2020 grant opportunity released and application workshop held.

NOV - DEC: Letters of Intent due; received 24 submissions. Sixteen organizations invited to submit full applications.

2019

JAN: Second staff member hired.

FEB - MAR: Site visits with first cohort of grantees completed. FY2020 grant applications due.

APR: FY2020 new grant awards approved for 9 organizations; an additional organization was awarded later in the year bringing the total of new grants to 10.

MAY: Renewals for FY2019 grants approved. This brought the number of organizations receiving funding in FY2020 to 24, for a total of \$1,293,564 in awards addressing four focus areas.

JUN: End of second fiscal year and time period covered in this report.

*OSEDA. (2015). *Seniors Count of Greater St. Louis: Needs Assessment*. St. Louis City.

FUNDED PARTNERS

Supporting organizations to serve older residents

In the St. Louis City Senior Fund's first year of distributing grants, we invested in two focus areas: **fall prevention** and **economic security** programs. These priorities were identified based on needs assessment data collected during the senior services tax ballot initiative. The needs assessment included feedback from a mailed survey sent to City older residents, focus groups with older residents, a web-based survey sent to service providers, and data from the American Community Survey

and other secondary data sources. We continue to add focus areas over time and will reassess funding priorities every few years.

Seventeen organizations received grants that totaled \$736,729 in awards. Grants supported specific programs for older residents in whole or in part. Many of the funded partners had additional programs and resources for older adults that were available for City residents outside of what was supported by the Senior Fund.



Fall Prevention PARTNERS

City Seniors Inc.
 Jewish Family
 Services
 Mission: St. Louis
 Northside Youth and
 Senior Service Center
 Paraquad
 Rebuilding Together
 - St. Louis
 St. Andrew's Senior
 Solutions
 St. Louis Society
 for the Blind and
 Visually Impaired
 The Oasis Institute



Economic Security PARTNERS

Cardinal Ritter
 Senior Services
 Deaconess Faith
 Community Nurse
 Ministries
 Heat Up St. Louis
 Housing Options
 Provided for the
 Elderly
 LifeWise STL
 Lutheran Senior
 Services
 Missouri EnergyCare
 St. Louis Area
 Agency on Aging

To view the Senior Fund's most current list of funded partners, go to stlseniorfund.org.

“ THANK YOU VERY MUCH

for choosing my house to be worked on. I still know there are some good people in the world. I am so grateful that you helped me. I am 77 years of age and have done the very best that I could do to keep my house up.”

*- Rebuilding Together
St. Louis Client*

“ BEFORE THIS PROGRAM,

I didn't know if I was going backward or forward... This program has made me grow in myself—not just financially, but mentally.”

*- Lifewise STL
Program Participant*



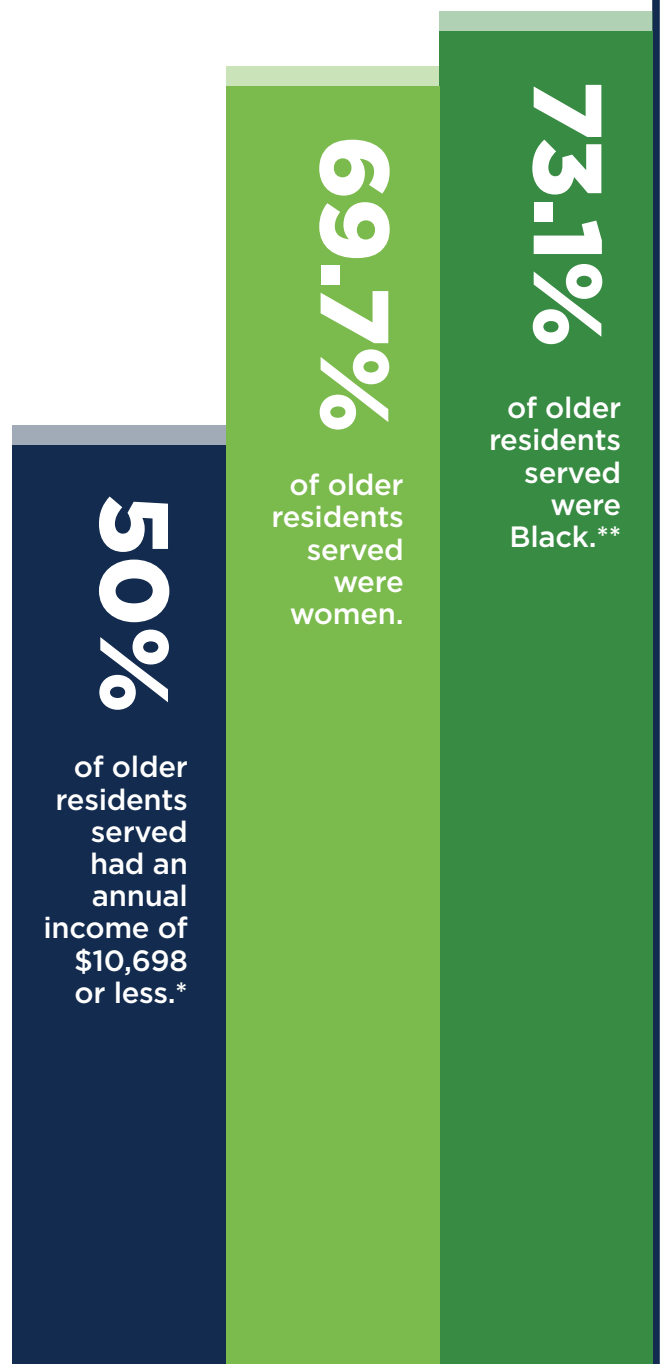
SUMMARY OF RESIDENTS SERVED

Reaching older residents throughout St. Louis City

1,519

older City residents were served in FY2019 by programs supported by the Senior Fund.

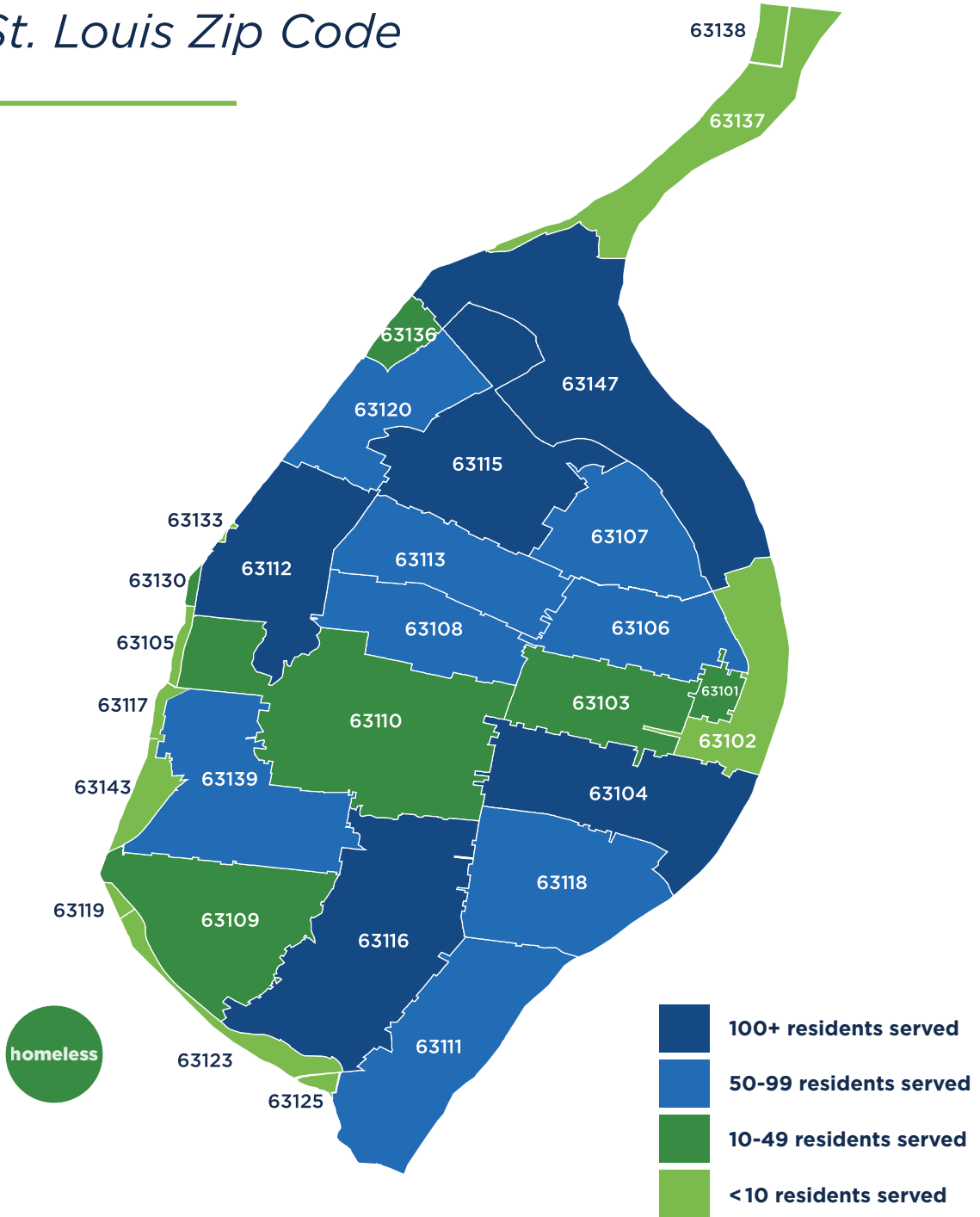
70 YRS
 Median age of older residents served
 (range was 60-101)



* Income range reported is for residents who were served by programs for which income affected eligibility. Annual income ranged from \$0-\$56,225, household size ranged from 1-7. Some residents had \$0 in reported income. This could be because a person was not currently employed, did not have retirement savings, and/or did not qualify to receive Social Security benefits even if they were "retirement age."

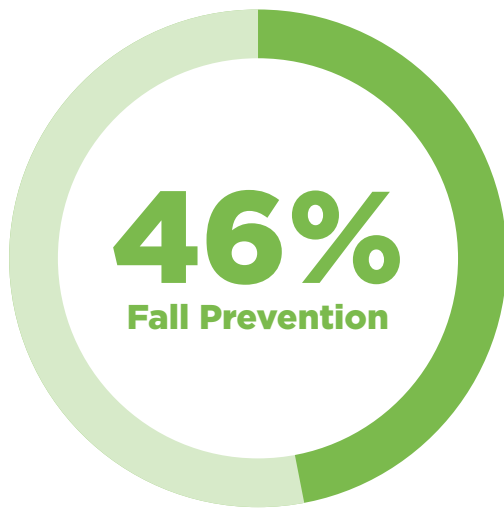
** For other residents served, 21.1% White, 4.4% Asian, 0.5% Bi-racial (Black and White), 0.2% Hispanic, 0.2% Native Hawaiian, 0.1% American Indian, 0.6% Other Race or Ethnicity.

Where Older Residents Lived by St. Louis Zip Code

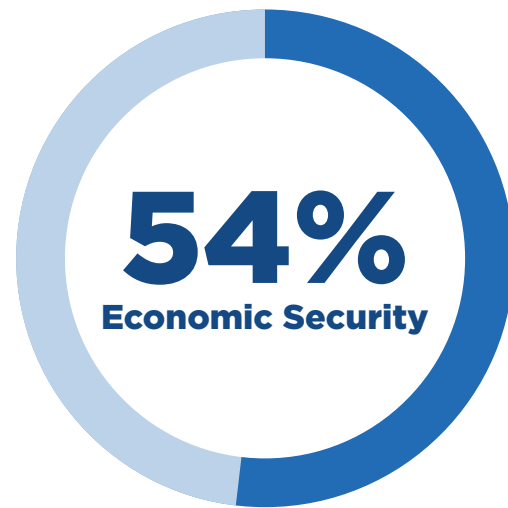


Note: Zip codes partially in the City - 63105, 63117, 63119, 63120, 63123, 63125, 63130, 63133, 63136, 63137, 63138, 63143

How Older Residents Were Served by Program Area



- 26%** Exercise Classes
- 24%** Home Repairs or Modifications
- 23%** Medication Management
- 22%** Fall Prevention Education & Referral
- 8%** Assistance with Low Vision



- 53%** NCOA Benefits Check-ups
- 42%** Weatherization & Utility Assistance
- 5%** Financial Education & Counseling
- 5%** Moving Assistance to Subsidized Apartment



**OUR OLDEST
CLIENT, WHO IS
IN THEIR MID-90s,
IS VERY ACTIVE
IN OUR SENIOR
CENTER PROGRAM.**

They enrolled in our medication management program and were one of our first clients who experienced the highest reduction in pharmacology therapy. They have been able to improve their blood pressure rate with half of the medications they were previously prescribed. Their primary physician has praised their efforts and is continuing to monitor their progress.”

- Northside Youth and Senior Service Center



FOCUS AREA

FALL PREVENTION

Offering resources for older residents to reduce their risk for falls

For many people, an unexpected fall can result in a serious and costly injury. Falling is not a normal part of aging. Strength and balance exercises, managing medications, having vision checked, and making living environments safer are all steps people can take to prevent a fall. In FY2019, the Senior Fund sought to support programs that would help older residents reduce their risk for falls and live safely in their home and community.



694

older City residents were served by a fall prevention program supported in whole or in part by the Senior Fund.



174 older residents participated in fall prevention education programs and/or fall risk screenings led by Jewish Family Services and Oasis Institute. Some of these residents also received assistance with connecting to resources for support as needed.



169 older residents participated in exercise programs at nine sites throughout the City. Classes focused on improving balance with exercises that promoted muscle strength, flexibility, and/or range of motion. They included Stretch Yoga, Balance Barre, and Chair Line Dance offered at City Seniors in partnership with Vitality Ballet; Tai Chi, Matter of Balance, Better Balance, and ExerStart led by Oasis Institute and hosted at several different locations; and general use and one-on-one support for exercise at Paraquad's Health and Wellness Center.



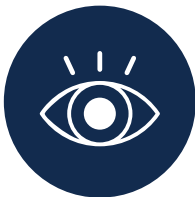
169 older residents had their medications reviewed by trained healthcare providers through two organizations; Northside Youth and Senior Service Center, in partnership with Saint Louis University's Geriatric Clinic, and St. Andrew's Senior Solutions. Residents received additional assistance, as needed, to set up medical appointments to consider reducing or changing medications, obtaining medications they had trouble affording, and implementing strategies to help manage use.



168 older residents received assistance with home repairs or modifications from three organizations: Rebuilding Together - St. Louis, Mission: St. Louis, and St. Andrew's Senior Solutions.

602 safety-related changes were completed. The most common repairs or modifications were related to railings, lighting, and grab bars. Repairs to floors and steps and additions of ramps and safety equipment were also completed for some residents.

Many residents' homes had additional repairs that were beyond funding available through the Senior Fund (e.g., extensive plumbing or electrical issues, roof repairs). Partner organizations were able to respond to some of these needs with funding from other public and private sources.



57 older residents who experienced vision challenges after using glasses or contacts received a low vision assessment

and assistance with obtaining low vision and adaptive living aids through the St. Louis Society for the Blind and Visually Impaired. 19 residents received further assistance through the organization's Vision Rehabilitation Therapy services to help them adapt to their vision changes and continue to remain independent, safe, and healthy in their homes.





ONE PARTICIPANT HAS COME FAITHFULLY TO THE CLASSES

for Better Balance. Even though they use a walker and have mobility issues, they are willing to try anything. They know their limits and accept help from the instructor and fellow class members when needed. Other class members cheer them on and recently have acknowledged their progress.”

– Oasis Institute



“

ONE OF OUR CLIENTS, WHO IS IN THEIR LATE 70S,

is essentially bed ridden and has a high fall risk. We installed an ADA toilet for bathroom safety and a light fixture in the ceiling of their main living area to improve lighting and minimize risk of tripping. In addition, they no longer had the key to the doors for their home. They were regularly leaving their door unlocked so caregivers and service providers could enter without needing to get up and answer the door. This put our client's safety at risk. We installed new locks and keys to ensure their safety from both a fall risk and crime perspective.”

- *St. Andrew's Senior Solutions*





A CLIENT WE WORKED WITH WAS IN THEIR EARLY 60s, HOMELESS,

and experiencing progressively worse housing situations. After sleeping on the couches of family members and friends, they were reduced to sleeping on a park bench and finally under a bridge. Because they had no stove, refrigerator, or permanent address, living day-to-day was very costly. This meant that even when an apartment did open, they didn't have enough money for first month's rent and a deposit, they also did not have any furniture. Support from the Senior Fund allowed us to pay for their first month's rent and deposit and obtain some basic furniture to get them started. They are now settled into a clean and safe apartment that they can financially afford."

- Housing Options Provided for the Elderly (HOPE)



FOCUS AREA

ECONOMIC SECURITY

Connecting older residents to resources that help meet basic needs

One in two older adults in St. Louis City are economically insecure; many struggle to cover the costs of housing, healthcare, transportation, food, and/or other expenses*. In FY2019, the Senior Fund sought to support programs that would help older residents access resources and strategies to increase their income or decrease expenses. Some funding was also allocated to address emergency utility assistance to ensure residents could live safely in their homes.



825

older City residents were served by an economic security program supported in whole or in part by the Senior Fund.

*OSED. (2015). *Seniors Count of Greater St. Louis: Needs Assessment, St. Louis City.*



437 older residents completed a locally tailored version of the National Council on Aging's BenefitsCheckUp®

to apply for benefits and other resources. Several organizations helped residents with reviewing and applying for benefits: St. Louis Area Agency on Aging, in partnership with Bilingual International Assistant Services and Mission: St. Louis, Lutheran Senior Services, and Deaconess Nurse Ministry.

300 residents confirmed they received 492 new benefits and resources that helped reduce the costs of their medications, medical care, food, rent and other housing needs. The new benefits had a financial value of \$809,348.



349 older residents received weatherization and/or utility assistance

to ensure they could remain safe and healthy in their homes, no matter the season. Three organizations assisted residents: Cardinal Ritter Senior Services, EnergyCare, and HeatUp St. Louis.

255 residents received assistance with utility bills; a total of \$60,217 in utility expenses were paid during the year. 121 residents received window air conditioners, space heaters, or other supplies to help stay warm or cool in their homes. An additional 13 residents received weatherization focused repairs such as window or door replacements and furnace or air conditioner repairs.



40 older residents participated in multi-week financial and aging education courses

led by Lifewise STL. In addition to attending seminars, participants were connected to a financial savings match program, individual financial counseling, and the BenefitsCheckUp® program.



39 older residents received assistance from Housing Options Provided for the Elderly (HOPE) to reduce their housing

cost burden by moving to subsidized senior apartments. Assistance included identifying and applying for apartments, as well financial support for any initial moving needs.

The new median rent for residents assisted by HOPE was \$247 per month, ranging from \$75 to \$454 per month.

13 residents did not have permanent housing at the time they connected with HOPE; before moving to an apartment, they were relying on staying with family or friends or living in cars, shelters, and/or outside.





ONE OF OUR CLIENTS, WHO WAS IN THEIR LATE 70S,

called our Aging Answers Line to request help with re-applying for Medicaid in-home services to assist with daily activities such as cleaning, cooking, and laundry. Our Elder Care Specialist helped them re-apply for in-home services and completed the BenefitsCheckUp[®]. In addition to support through Medicaid, our client was eligible for benefits they did not currently receive, including the Low-Income Home Energy Assistance Program (LIHEAP) and the Missouri Property Tax Credit (Circuit Breaker). They were also able to receive prescription support stockings and a handheld shower head from other resources at our organization. Our client is now able to continue living in their home.”

- Lutheran Senior Services





ONE OF OUR CLIENTS WAS IN THEIR EARLY 60S

and had recently taken custody of their four grandchildren. The five of them were living on our client's monthly Social Security benefits. We assisted them with a very high utility bill, repairs to their furnace, and a new window air conditioning unit. They also received some stand-alone fans. These repairs not only improved their home living conditions but will help reduce their monthly utility bills. Now that they are connected to our organization, they will continue to receive support through our Relatives Acting as Parents Program and other services.”

- Cardinal Ritter Senior Services



FY 2018 & 2019

FINANCIALS

Statement of Net Position

	FY18	FY19
Assets		
Cash	\$1,871,912	\$ 3,147,534
Taxes Receivable	100,907	136,363
Accounts Receivable		25,563
Prepaid Expenses and Other Assets		167
Total Assets	1,972,819	3,309,627
Liabilities		
Accounts Payable	2,633	31,216
Accrued Liabilities	1,864	3,044
Accrued Compensated Absences	3,726	4,262
Total Liabilities	8,223	38,522
Net Position		
Unrestricted	1,964,596	3,271,105
Total Liabilities and Net Position	\$ 1,972,819	\$ 3,309,627

FY2018 – December 31, 2017 – June 30, 2018; FY2019 – July 1, 2018 – June 30, 2019

FY 2018 & 2019

FINANCIALS

Statement of Activities

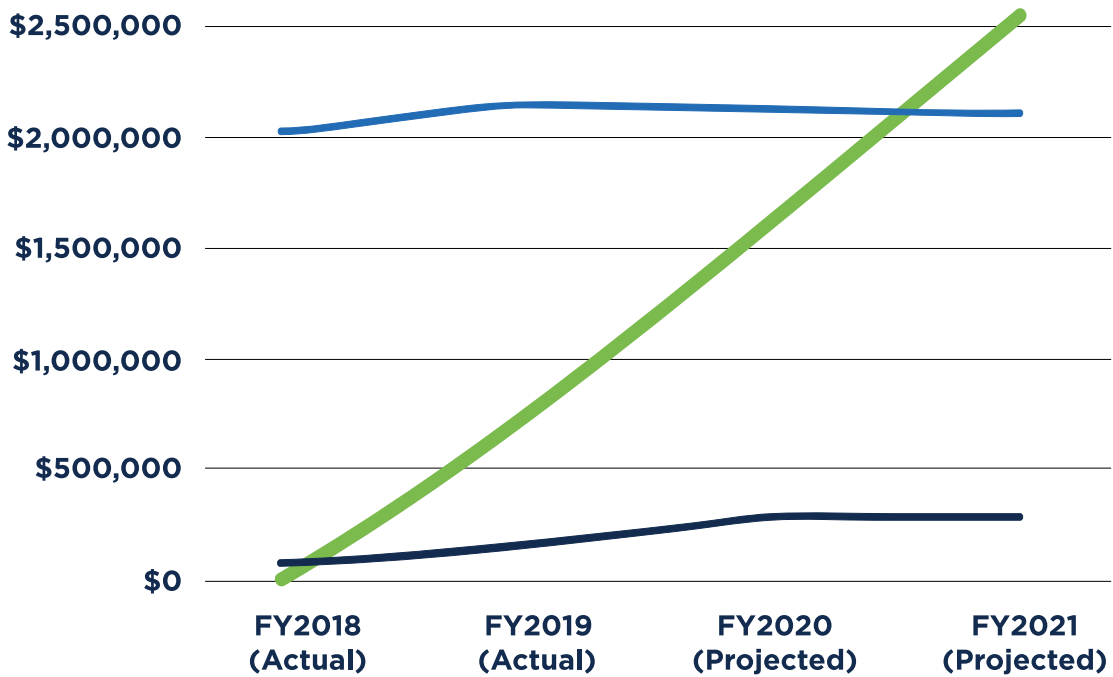
	FY18	FY19
Program Expenses		
Senior Citizen Services Provided	\$ 85,879	\$ 887,394
General Revenues		
Tax Revenue	2,042,948	2,149,933
Interest Income	7,527	43,970
Total General Revenues	2,050,475	2,193,903
Change in Net Position	1,964,596	1,306,509
Net Position - Beginning of Year	-	1,964,596
Net Position - End of Year	\$ 1,964,596	\$ 3,271,105

FY2018 - December 31, 2017 - June 30, 2018; FY2019 - July 1, 2018 - June 30, 2019

FY 2018 - 2021

REVENUE & EXPENDITURES

Actual & Projected



● Tax Revenue ● Grant Awards ● Program Support & Other Expenses

ST. LOUIS CITY SENIOR FUND

BOARD & STAFF

Executive Board

William Siedhoff, Chair
 Cynthia Crim, Vice-Chair
 Theresa Mayberry, Treasurer
 Mary Ann Nestel, CSJ, Secretary
 Chauncey “Skip” Batchelor
 Ann Bannes
 Karl Wilson

Staff

Jamie Opsal
Executive Director

Stephanie Herbers
Program Manager



Board members must live in the City of St. Louis and are appointed by the Office of the Mayor.



SENIOR FUND
ST. LOUIS CITY



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REPORT

TO THE COMMUNITY

