



Looking Back, Looking Forward

2009–2010 Annual Report

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PLEASE REMEMBER
CARESOURCE
IN YOUR ESTATE PLANS.

These have been challenging times for everyone, no more so than for those of us in the caring industries. This past year CareSource saw more people in true need of our services. We have been pleased to see that those who comprise the CareSource family are meeting the challenge. The level of dedication and professionalism among our staff, executives and volunteers is exceptional. The response from the community has been emotionally, if not yet financially, gratifying.

Looking forward, we are committed to being the best at what we do. The challenges are increasing, but we must meet them head on. Providing services to those in need and building CareSource as a vital community resource are our fundamental objectives. To accomplish this, we reach out to you. Please join us this coming year with your interest, involvement and support in any way you can.



Stephen Margulis

Our Board of Directors continues to be an integral and important part of CareSource as they keep us grounded in our mission and guide us toward more effective ways of serving our clients while maintaining a sound financial base. This year the Board voted to require 100% participation of all directors in their support of CareSource through personal donations, increasing our annual income from personal donations by an estimated 43%.



As you read this annual report, please take note of the fantastic work done by the CareSource staff. These dedicated professionals work all day long to assure our clients are safe, secure and healthy. The services they provide to our clients would not be possible without the generous funding provided by our donors. Thank you for your support, whether it was in the form of a financial gift, a donation of your time and energy, or just telling someone about the good work we do here at CareSource.

THANK YOU!

Financial Report

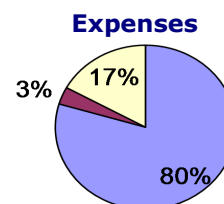
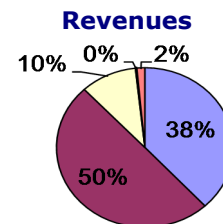
The poor economy took a toll on everyone, and CareSource was no exception. As anticipated, revenues were down while expenses remained static. Thankfully, our previous year had established a small surplus; because of this we managed to avoid any staff reductions or program losses. This coming year our goal is to increase our unrestricted income, rather than program-specific funding, in order to maintain the financial stability of the whole agency.

Revenue

■ Guardianship and Protective Services	\$294,146.49
■ Dare to Care	\$385,684.09
■ Fiscal Literacy & Independence Project	\$80,153.25
■ Advice, Advocacy & Education	\$2,023.89
■ Donations/Grants	\$11,373.70
Total Revenue	\$773,381.42

Expenses

■ Program Services	\$662,955.00
■ Fundraising	\$28,479.00
■ Administration	\$142,042.00
Total Expenses	\$833,476.00



OUR PROGRAMS

CareSource has four established programs, three offering direct services and one offering information, referrals and education. This year we served more than 150 individuals and delivered over 11,000 hours of service.

Fiscal Literacy & Independence Project (FLIP)

Our newest program provides financial counseling and daily money management to persons at risk for bankruptcy or financial exploitation. We explore entitlements and benefits, educate clients on how to manage their money better and serve as the representative payee for some individuals at risk for financial exploitation or mismanagement.

CareSource provided ongoing FLIP supportive services to **22 families** this year. As a collaborating partner in the United Way-funded program "Building Generations," we provided fiscal literacy and benefit application services to an additional **26** Coral Springs residents. The positive results of these services are highlighted below:

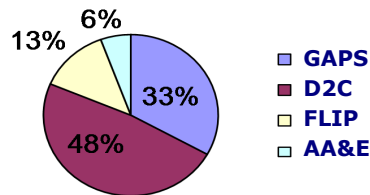
Fiscal Literacy & Independence Project (ongoing daily money management)

28% received one new benefit
4% received two or more benefits
68% maintained or improved fiscal literacy in other ways

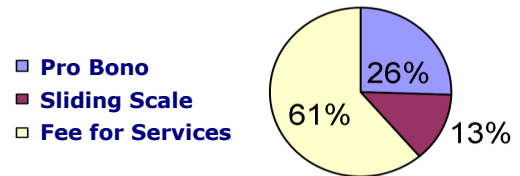
FLIP (in Building Generations Program) (Limited benefit application services)

62% received one new benefit
23% received two or more benefits
15% ineligible or pending approval

Indigent Clients served based on Programs Accessed



Clients served based on Payer Source



Guardianship and Protective Services (GAPS)

The GAPS program is the longest running of our three service programs. If an individual is legally incapacitated, has no advance directives, and is non-compliant with the necessary assistance to provide for their well-being, then guardianship may be the only alternative to keep him or her safe. This unusual and rarely replicated program fills the "gaps" in service left by other social service agencies in the South Florida community.

Since our last Annual Report, CareSource has been appointed guardian for 20 more incapacitated individuals and provided support to another two family guardians. This year, 99% of all the court reports we filed were submitted on or before the required date as evidenced below:

100% of Initial Plans filed timely

98% of Annual Plans filed timely

100% of Initial Inventories filed timely

100% of Annual Accountings filed timely

Early in 2010 the Social Security Administration conducted a field audit of our files due to the number of individuals for whom we serve as representative payee. The audit included interviews with clients and their care providers. The interviewed individuals expressed overall satisfaction with our services; one facility reported that **"CareSource was clearly the best Guardianship [agency] in terms of identifying patient needs and routine visits to see the patients."**

Dare to Care (D2C)

Our Care Managers provide a direct link between clients and the services and care providers they need. We offer intense case management rarely replicated by other agencies to some of South Florida's most at-risk residents, including persons who are legally incapacitated.

This year, our care managers made **1621 visits** to our clients at their homes, senior centers or doctor's offices. At each of these visits, staff assesses five key indicators to assure we meet our goal to keep clients safe and independent. This year we were very successful as shown below:

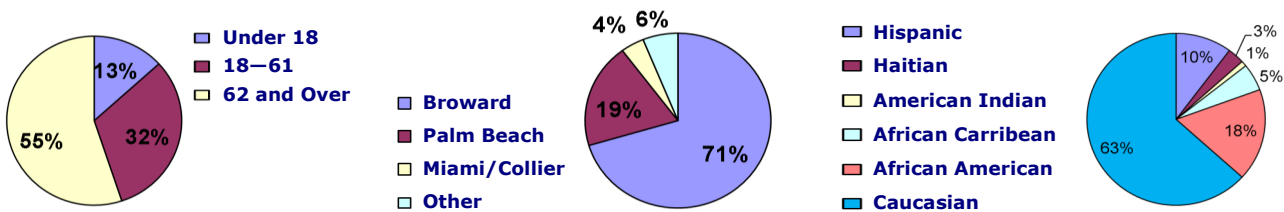
- 99% of program participants received regular medical care**
- 97% of all clients were in safe housing at each visit**
- 96% of all clients' mental status was the same or better**
- 94% of our clients' Plans of Care remained appropriate**
- 94% maintained or improved their functional status**

The *Friendly Visitor Project*, an expansion of D2C thanks to funding from the United Way of Broward County, trains volunteers to visit clients between professional care management visits. In the inaugural year of this project, we trained **4 volunteers** who in turn provided **68 friendly visits** to **12 different clients** (see "Our Volunteers" section for more details.)

Advice, Advocacy & Education (AA&E)

This year, we provided more than **130** hours of information and referral services to **121** individuals in need. We trained more than **120** professionals within the South Florida community on various subjects. We also sponsored a 40-hour Professional Guardian class, open to the public, to ensure the four new CareSource employees complete the course pursuant to our policy.

Age, Location and Ethnicity of the clients we served (by all programs)



Our Volunteers

AARP For almost five years now we have been fortunate to have some of the best volunteers assist with our clerical and administrative duties through the AARP Senior Community Service Employment Program. We also met some terrific new supporters through Volunteer Broward.



With a generous donation from the United Way of Broward County, CareSource launched the *Friendly Visitor Project* to complement the wonderful work of our Care Managers. In addition to the direct benefit to our clients, these very special volunteers take their new knowledge back to their neighborhoods and share their caregiving expertise with family and friends. Our first friendly visitor, Lois Entin, was honored in the 10th Annual Heart of the Community salute sponsored by The Miami Herald and Volunteer Broward.

We are always looking for volunteers to help with the varied and interesting tasks we perform at CareSource. Check our website's Volunteer page at www.CareSourceFL.org for more information, or just call our office at 954-720-2485.



According to the Florida Department of Elder Affairs, between 5,000 and 10,000 persons are in need of guardianship services each year. While CareSource is not a designated Public Guardian, we serve as a “de facto” public guardian. More than a third of our guardianship clients are indigent, and most of the program’s clients are also served through our Dare to Care program.

Published by CareSource

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CareSource is a not-for-profit charitable organization with a 501 (c)(3) designation from the IRS.

Since 1992, it has overseen the care of hundreds of clients living in Broward, Miami-Dade, and Palm Beach counties.

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CareSource is a United Way of Broward County 2009–10 funded Community Impact Partner

Mission and Vision

Our Mission is to support vulnerable individuals who need help with life management due to age, disability or family circumstance.

Our Vision is to be the premier advocate for vulnerable persons in our community using innovative programs.

History

CareSource is a Broward County-based agency providing services to the frail, elderly, mentally ill, disabled, indigent and at-risk populations of South Florida, helping them to remain safe and independent.

In September 2010, **CareSource celebrated its 10-year anniversary** as a not-for-profit organization. Although we had been offering services to the vulnerable communities of South Florida as The ElderCare Connection since 1992, in 2000 we welcomed the challenges and rewards of finding new partners to move our vital work forward within a non-profit environment. Since that time we have moved to a culture of *FriendRaising* and *FUNdraising*, established defined program with clear outcomes, instituted annual financial audits of the agency’s systems and accounting practices and trained over 2500 individuals to be either family or professional guardians.

As a non-profit agency, CareSource is funded through sliding scale program fees, fundraising events, grants, and individual donations. We offer our services without regard to the individual’s ability to pay. Your gifts enable us to remain responsive to those in our community who are vulnerable and incapacitated. Sadly, we have a waiting list for our services for the first time ever. We now face the dilemma of having to remain viable both financially and in our service delivery, while being anxious to respond to the very real and growing needs in our community.

We ask for the continuing support of both our individual and institutional donors in carrying forward our crucial work, and welcome participation through charitable donations, referral to others or volunteer assistance.

Our Supporters

In January 2010, we held our Annual Pro Bono Recognition Luncheon and our fun and funky “Game of Life” in June, raising over \$7800 this year. Thank you to the **Signature Grand** and the **Preserve at PalmAire** for hosting these events. And thank you to our **Regular Supporters** (listed below) as well!

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THANK YOU ALL FOR YOUR ONGOING SUPPORT!