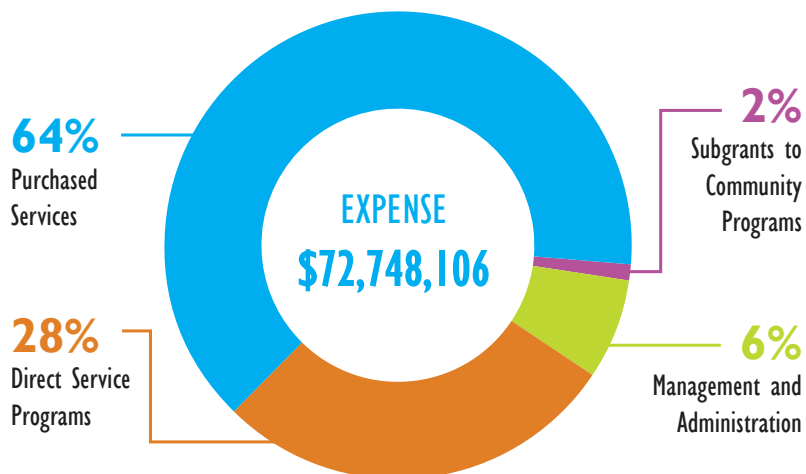
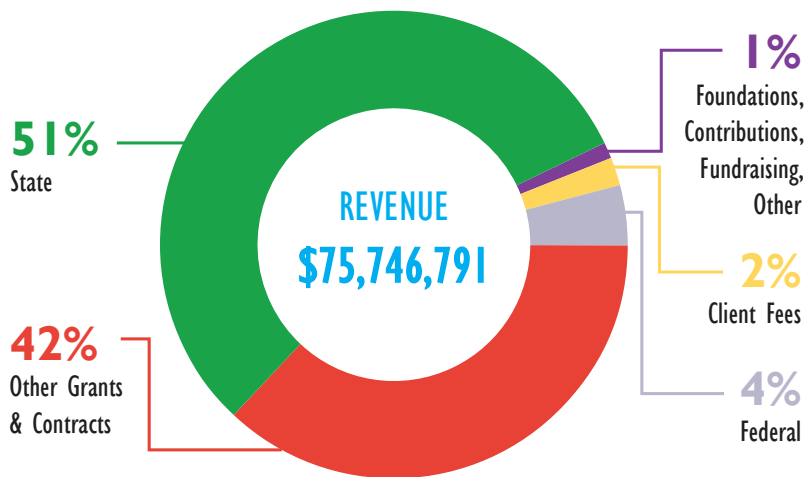




# ANNUAL REPORT 2019

# FY 2019 FINANCIALS

07/01/2017 - 06/30/2018



## SOURCES OF REVENUE

- AARP Foundation
- Administration on Community Living (ACL)
- Centers for Disease Prevention & Control
- Circle Health
- Commonwealth Care Alliance
- Community Fund for Nantucket
- Department of Public Health
- Executive Office of Elder Affairs
- Fallon Community Health Plan
- George C. Wadleigh Foundation
- Griffin-White Foundation
- Harvard Pilgrim Health Care Foundation
- Katharine C. Pierce Trust
- Mass Association of Councils on Aging
- MassHealth
- N4A Hartford
- National Councils on Aging
- Partners in Care Foundation
- Pfizer Inc.
- Senior Whole Health
- Tewksbury Housing Authority
- Title III of the Older Americans Act
- Tufts Health Plan Foundation
- United Healthcare Community Plan
- Veterans Administration
- Winn Properties

## PROGRAMS

Aging & Disability Resource Consortium  
Community Choice Program  
Congregate Housing  
Consumer Directed Care  
Elder Brown Bag Program  
Enhanced Community Options  
EnhanceWellness Program  
Family Caregiver Support Program  
Frail Elder Waiver  
Group Adult Foster Care  
Healthy Living Center of Excellence  
Healthy IDEAS  
Home & Community-Based Waiver  
LGBT Senior Social Connection  
Long Term Care Ombudsman  
Massachusetts Senior Medicare Patrol (SMP) Program  
One Care Plan  
Options Counseling  
Personal Care Attendant  
Program of All-inclusive Care for the Elderly (PACE)  
Senior Care Options Programs  
Serving the Health Insurance Needs of Everyone (SHINE) Program  
Supportive Housing  
Veterans Direct Program  
Volunteer Programs

## SERVICES

Adaptive Housing/Durable Medical Equipment  
Adult Day Health Care (Medical, Social, Dementia)  
Care Management  
Chore Services  
Clinical Assessment & Eligibility  
Companionship  
Habilitation Therapy  
Home Delivered & Congregate Meals  
Home Health Services  
Homemaker Services  
Information and Referral  
Medication Dispensing Systems  
Minority Outreach  
Money Management/  
Representative Payee Service  
Nutritional Assessment  
Personal Care Services  
Personal Emergency Response Systems  
Protective Services  
Resident Services Coordination  
Respite Care  
Short Term Respite Beds  
Supportive Home Care Aide  
Wanderer Locator Systems

## Community Education...

- Outreach Efforts – assisted residents and supported the councils on aging in Lawrence, Andover and North Andover in the aftermath of the Columbia Gas Crisis
- Participated in over 40 health, info and resource events across the Merrimack Valley
- Supported the Merrimack Valley Councils on Aging community awareness and outreach efforts
- Hosted 24 Elder Network Meetings featuring speakers who presented on agency programs, services and new initiatives



## Recognition...

- Celebrated 45 Years of Service to older adults in the Merrimack Valley
- Healthy Living Center of Excellence – Trailblazer in Aging Innovator Award from NCOA
- Merrimack Valley Chamber Award for Non-Profit Small Business
- Milestone Award – Presented by Merrimack Valley Magazine for 45 years in business



*Celebrating*  
working together to improve  
in the community

# REVIEW



## Events...

- 23rd Annual Golf Classic
- Second Annual Rocktober Vibe
- Caregiver Events – Pies for Guys, Latino Caregiver Event, Morning for Me and Memory Cafés
- Lobby Day at the State House

## New Initiatives...

- Long-Term Services and Supports Community Partners - Expanded services to include new populations ages 3-64 and now working with 11 Accountable Care Organizations
- Developed CAPABLE - An in-home evidenced-based program (Community Aging in Place – Advancing Better Living for Elders) to decrease falls risk, improve safe mobility, improve ability to safely accomplish daily functional tasks.
- Expanded the Resident Services Coordinator Program to private housing in Newburyport
- Grant funding from ACL expanded Falls Prevention efforts to New England regions.
- Pfizer Community Initiative Grant – expanded community markets to 9 sites, outreach to underserved populations and supported our LGBT Senior Social Connection

g 45 years  
improve the quality of life  
in the communities we serve

# ON A FINAL NOTE...



Joan Hatem-Roy, Chief Executive Officer

This past year was filled with exciting opportunities and unexpected challenges that taught us about resiliency, tenacity and our ability to think creatively.

The Columbia Gas Explosion crisis in Lawrence, Andover, and North Andover, along with the parking upheaval at our Lawrence offices, demonstrated our capacity to prioritize resources and use them where they were needed most – serving our consumers and the community.

New opportunities were abundant. Our service options were expanded to include a broader population serving younger consumers including those with disabilities who experience many complexities of daily living. New funding expanded our evidenced-based programming to other states in the New England region. We became an active member in the Lawrence Partnership as a member of the Board, as well as taking on leadership

responsibilities with Accountable Care Organizations, Columbia Gas, the Essex County Community Foundation and the statewide Home Care network. In the field of aging, our work as thought leaders, change agents and innovators has positioned the agency as an important and willing collaborator for local state and federal leaders seeking new ways to address the Social Determinants of Health and long-term care concerns.

Most importantly, the past year focused on our merger with North Shore Elder Services. This new venture expands our resources and enhances our competitive edge with existing and new funders; serves five additional communities, totaling 28, and embraces a diverse staff of almost 500 members. We are grateful to all our staff, who have been incredible, through the transition process and to our Board of Directors for their unwavering support while integrating two long-standing and successful organizations.

We will continue to embrace change as we adjust, adapt and evolve as an organization. However, what will remain steadfast is our mission of meeting the needs of our consumers and their families. This work is not done alone, and we recognize that our community partners' commitment to this agency plays a crucial role in our continued success. Thank you for your continued support.

Sincerely,

Joan Hatem-Roy  
Chief Executive Officer



## BOARD OF DIRECTORS FY 2019

Maurice Balboni	Corinne LaCharite
Pamela Blaquiere	Grace A. Lagana
Dean Cleghorn	Sandra Levin
<i>Vice President</i>	Charlene Muscato
Annamary Connor	Colleen Ranshaw-Fiorello
<i>Clerk</i>	Roseann Robillard
Alan DeNaro	<i>President</i>
Laura Dillingham-Mailman	Michael Rurak
Ennis Duffis	<i>Treasurer</i>
H. Crowell Freeman	Ashley Springman
Nancy Gump	Grace Ann Steed
Robin Hynds	Martha Velez
Edward Irvin	



## ADVISORY COUNCIL FY 2019

Amy Anwyl	John Lawlor
Doreen Arnefield	Debbi Logan
Richard Aziz	Lisa Shea
Frank Baskin	Joanne Souza
Randy Carter	Elizabeth Vallerand
Martha Cashins	Daisy Varela
Michael Causbie	Beth Vellante
Jerry Congdon	Theresa Woodbury
Connie Donahue-Comtois	



## SENIOR MANAGEMENT FY 2019

Joan Hatem-Roy	Jennifer Raymond
Christine Tardiff	Meredith Fisher
Anne Proli	Alicia Ritter
Tammy O'Donnell	Marie Kissel
Mark Batchelder	Kim Flowers
Anna Bellows	Sandy Jennings
Ron Bourque	Lisa Arsenault



## **Elder Services of the Merrimack Valley, Inc.**

*Choices for a life-long journey*

280 Merrimack Street, Suite 400, Lawrence, MA 01843  
800-892-0890 • [www.esmv.org](http://www.esmv.org)

 @ElderServices  @ESMVNorthshore

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